viewfindermailinglist THE MANUAL

Table of Contents

Introduction

Viewfinder Mail List (VML) is an easy to use yet comprehensive mailing list manager with support for multiple lists, automatic subscribes and unsubscribes, custom fields and reporting. Although the application is designed to be easy to use, the following guide should also help in the general usage and features of the package.

Viewfinder Mailing List and this manual were conceived, coded, written and published by Lee Penney. You can find out more about Lee at his personal site: www.thedigeratipeninsula.org.uk

If you find the software useful please consider making a donation via the website and/or providing a link back to www.viewfinderdesign.co.uk

Warranty and Licence

Viewfinder Mailing List is offered completely free for commercial and non-commercial use but comes with no guarantees, warranties or support of any kind. The software is supplied as is and by using it you accept that you do so at your own risk.

Features

Viewfinder Mailing List has the following features:

- Handles a large number of recipients
- Support for numerous mailing lists
- User admin and access levels for administration
- Mailing templates
- Automatic archiving of sent emails
- Save emails
- Build emails using templates, previous sent or saved emails
- Support for embedded or linked images
- Easy upload images to the server
- Remote capture of hosted images to be embedded
- Reports on sent mails
- Ability to review and delete mails in the mail queue

- Custom fields to store whatever data you wish to collect
- Open tracking of HTML emails
- Import and export of mailing lists
- Delayed sending
- Throttled sending
- Tags to allow user data to be entered in email (such as first name)

Requirements

In order to run Viewfinder Mailing List you need to install it on a web server with a connection to the internet and a mail sending ability. The server needs to have PHP version 4.3.7 or higher (it may run on lower but this has not been tested) and MySQL version 3.23.49 or higher installed. You must also have the rights to create a database though it can use and existing one. In order to send email you need to be able to create cron jobs or have access to some sort of scheduled task processing. Another option is to use pseudo-cron, which is mentioned further on in this manual. Check out the Setting up Cron section at the end of this guide.

Installation

To install VML, download and unzip the VML package. Copy all of the files and folders to a folder on your web server and open the install.php page in your browser (e.g. http://www.yourwebsite.com/thefolder/vml-admin/install.php), follow the onscreen instructions. Note that you need your MySQL user details and you may need to create a database (and user) first in your host's control panel.

Copy the details you are given for the config.php file, edit your local copy and upload this into the folder you placed the installation, replacing the copy already there.

Now click on the link to the admin section (http://www.youwebsite.com/thefolder/vml-admin/) and login using the details provided.

The first thing you will be asked to do is complete the site details. To do this, you should enter the following details:

- **Site Name**: The name of your website/mail service.
- **Website Address**: The web address to your installation of VML (NOT your general address). This is used in some of the auto-generated links so it's important, and you should put a / on the end (e.g. http://www.yourwebsite.com/vml/).
- **Admin Email Address**: The email address any notifications and other email message from VML should be sent (not replies to emails sent).
- **'From' Email Address**: The email address that any mailing sent via VML will appear to come from.
- **Notification**: Whether you wish to be notified whenever someone leaves or joins a mailing list.
- **Default mail format**: Whether you want to set HTML or text emails as the list default (used when a subscriber has not specified one). Typically HTML is best as a multipart message will be sent which includes a text version.
- **Form type**: Whether you are using an inline or pop-up subscribe form.

- **Validation**: Whether you want people subscribing or unsubscribing to validate their action (stops automated services or other people subscribing/unsubscribing someone other than themselves.
- **Send Rate**: The rate you want to send messages (most web hosts set a limit to stop spam and limit the drain on system resources, plus it gives the mailer time to catch up). Default is 50, but this is for how many are sent each time the send script it scheduled to run, so if it runs once an hour, that's 50 per hour, if it runs once every 15 minutes that's 200 per hour..

Make sure you also check out the Setting up Cron section at the end of this guide, this is very important and VML will not work properly without it.

You also need to make sure that your change the permissions on the imagefiles folder in the vml-admin folder to writeable for everyone (CHMOD 777).

Once you have done this you're all ready, just create a mailing list, add some people to it, build and email and send it.

Upgrading

To upgrade from a previous installation of VML, backup all the files and the database in your current installation and save somewhere safe. Unzip the VML package, upload and overwrite all the files into your existing VML installation then open the upgrade.php file in the vml-admin folder in a web browser and follow the instructions.

Mailing Lists

This section covers everything on the Mailing Lists page.

Creating a List

To create a new mailing list, visit the Mailing Lists page. Under the heading Create List, type in the name of the list (note that this has to be unique, you can't have lists of the same name) in the List Name box and hit Create New List.

Adding Recipients to a List

You can add recipients to a list in two ways:

1. One at a time via the Mailing Lists page
2. By importing a CSV file of email addresses and details

1. Adding Recipients One at a Time

To add a single recipient, the fastest way is to go to the Mailing Lists page, scroll down to the Add Recipients section, enter the new or existing (for adding a subscriber to a new list) email address in the box, select the relevant list from the dropdown, and hit Add Recipient.

If you need to add any further details for this person, you can type in their email address to the Search/Edit Recipient box and then hit Search/Edit Recipient to edit their details.

2. Import Recipients in a CSV file

Comma Separated or CSV files can be produced by most spreadsheet applications and a range of other software too. You can even manually create them in a text editor if you wish.

Using Microsoft Excel as an example, you would create a new spreadsheet, put the word email at the top of the first column, then simply put the email addresses you want to import on separate rows. When you've done that, select File and Save As, from the Save as type dropdown box, select Comma Separated (CSV) and save it with any name you want.

Now login to VML and go to the Mailing Lists page. Scroll down to the Upload List section. Pick the list you want to add the recipients to, then hit Browse and locate the CSV file on your computer. Next you can pick from one of two options: Import New, which only imports new recipients to the list and Update Everything which will import any new subscribers and overwrite the details of any existing subscribers with the details in the spreadsheet. BE VERY CAREFUL using this second option as you could remove or destroy the data in the database. If you have a blank field in the spreadsheet you are importing but data in the system it will be wiped.

The spreadsheet can be used to update all of the fields in the system or only the ones you specify. To do this simply add more columns with the heading identical to the field you want the data imported to (e.g. First Name, format, etc).

You can also import data for custom fields this way.

View/Edit a List

You can search for individual recipients using the Search/Edit Recipient Details function, which will also allow you to edit their details, but if you want to see a complete list and make bulk changes the best way if via the View/Edit List function. Got to the Mailing Lists page and select the list you want to see from the dropdown in the View/Edit List section. Click View/Edit List.

In a new window you will see a complete list of all the recipients on the list including their basic details. To make changes, select the recipient(s) by clicking the check box on the right (use the Toggle link to select or deselect all boxes) and then pick the action you want to perform from the dropdown.

- Delete will completely remove the selected recipient(s) from the system.
- Remove will remove the selected recipient(s) from the mailing list.
- Update will let you update a selected field with for all of the selected recipients. Select the field from the next dropdown and enter a value in the box.

Click submit to perform the action.

Find Recipient/Edit Recipient Details

To search the database to see if a recipient with a specific email address exists or to edit the details associated with a recipient, go to the Mailing Lists page, type their email address into the Recipient Email Address box in the Search/Edit Recipient Details section and hit Search/Edit Recipient.

This will show you the subscriber's details where you can edit all of their details, including their email address and any custom fields. You can also use this screen to delete a recipient.

Exporting a List

To export a mailing list in CSV format, visit the Mailing Lists page and scroll down to the Export List section. Pick the mailing list from the dropdown and hit Export List, it will be exported as listname_yearmonthday.csv, just save on your compuer and open with a suitable application (such as StarOffice Spreadsheet or Microsoft Excel).

Deleting a List

To delete a mailing list, head to the Mailing Lists page and then scroll down to the Delete a List section, pick the list you want to delete from the dropdown and hit Delete List.

Sending a Mail

To send a mail you need to visit the Send page, this section covers all the options during the send process.

Constructing Your Mail

When you want to send a mailing you are presented with four options:

1. Brand New Mail – this enables you to create an email from scratch starting with blank fields.
2. Use Saved Mail – this allows you to pick a previously saved email and use that as your starting point.
3. New Mail Based on Previously Sent Mail – this allows you to pick one of the emails you have already sent and use that as your starting point.
4. New Mail Based on Template - this allows you to pick from any of the templates in the system as use that as your starting point.

Creating a Brand New Mail

Selecting this option will take you straight to the editing screen, see Constructing Your Mail below.

Using a Saved Mail

Selecting this option will present you with a list of all the saved emails in the system, to select one you just need to click on the name and it will take you to the editing screen and fill in the relevant details.

You can also preview the mail, send a test version to any email address or delete a saved mail from this screen.

Using a Previously Sent Mail

Selecting this option will present you with a list of emails that you have sent. Select one by clicking on the name and you will be taken to the editing screen with the relevant details completed.

You can also preview the mail from this screen.

Using a Template

Selecting this option will present you with a list of templates stored in the system. Select one by clicking on the name and you will be taken to the editing screen with the relevant details completed.

You can also preview the mail from this screen.

Constructing Your Mail

Once you have selected your option for how you want to create your mail you will be taken to the editing screen. This provides you with boxes to enter the subject, the HTML content, the text content, pick which list to send to, when you want to send it and whether you want to embed any images.

This page will also let you preview your mail, upload images into the system (so they can be embedded) and save the mail.

The text you want to appear in the subject line of your email goes in the Subject box.

The HTML code to make up the HTML version goes in the HTML Content box, obviously you need to construct this outside the system and then just copy and paste in.

You can either create a separate text version (needed regardless of if you have any recipients actually receiving text versions, it gets added to the HTML version as well) and copy and paste in to the Text Content box or you can hit the Create/Update Text Version button and the system will try and copy over the text from the HTML version, you may wish to tidy this up.

Once you've done that you can use the Preview button to see what it looks like prior to sending.

You may also need to upload images to the system if you wish to send them as embedded images. If your HTML specifies images available online, and they're not protected by hotlink protection, put the full URL (i.e. http://wherever.com/images/logo.gif) in the HTML code and if you have the Embed Images option checked and then hit save or send the system will automatically load the images into the booth (you may want to save the email and check this before sending it). See the Embedded vs Linked Images section below for the pros and cons of each type.

It's generally recommended that you build your email outside of the system using a web design package (bearing in mind the special requirements for email) and cut and paste the code/text into the relevant box.

It is also advisable to send a test version to different desktop and web-based mail clients to make sure it appears as it should in all of them.

Template Tags

In order to allow you to include some dynamic content, VML lets you use some simple tags which will be replaced during sending with relevant information from the database where possible. Just insert the tag into your mail where you want the text to appear. The tags you can use are as follows:

- {firstname} – this puts in the first name of the subscriber where possible and Subscriber if empty

  Usage: Dear {firstname}
- {lastname} – this puts in the last name of the subscriber where possible and Subscriber if empty

  Usage: Dear Mr {lastname}
- {fullname} – this puts in the first and last names of the subscriber where possible and Subscriber if empty

  Usage: Dear {fullname}
- {email} – this puts in the email address of the subscriber

  Usages: this email was sent to {email}
- {date d-m-Y} – this puts in the current (i.e. sent) date in the format dd-mm-yyyy (day with leading zero on single digits)

  Usage: this email was sent {date d-m-Y}
- {date m-d-Y} – this puts in the current (i.e. sent) date in the format mm-dd-yyyy (day with leading zero on single digits)

  Usage: this email was sent {date m-d-Y}
- {date j-m-Y} – this puts in the current (i.e. sent) date in the format d-mm-yyyy (day without leading zero on single digits)

Usage: this email was sent {date j-m-Y}

- {date d/m/Y} – this puts in the current (i.e. sent) date in the format dd/mm/yyyy (day with leading zero on single digits)

  Usage: this email was sent {date d/m/Y}
- {date m/d/Y} – this puts in the current (i.e. sent) date in the format mm/dd/yyyy (day with leading zero on single digits)

  Usage: this email was sent {date m/d/Y}
- {date j/m/Y} – this puts in the current (i.e. sent) date in the format d/mm/yyyy (day without leading zero on single digits)

  Usage: this email was sent {date j/m/Y}
- {date jS-F-Y} – this puts in the current (i.e. sent) date in the format dth m yyyy (e.g. 1st December 2006)

  Usage: this email was sent {date jS-F-Y}
- {date jS-F/Y} – this puts in the current (i.e. sent) date in the format d m, yyyy (e.g. December 1, 2006)

  Usage: this email was sent {date jS-F/Y}
- {format} – this puts in the format the subscriber receives the email in

  Usage: your current setting if for {format} formatted emails
- {showInBrowser} – this puts in the URL to a page where the email is displayed as a web page

  Usage: click here to see in a browser
- {unsubscribe} – this puts in the URL to the general unsubscribe page and adds the list id and subscriber id so they can be processed easily

  Usage: click here to unsubscribe
- {opentracking} – this creates a link to an image used to track if an email is opened (this only works for HTML emails)

  Usage: {opentracking}

Saving a Mail

If you wish to save the mail for future sending, to check something or to send yourself a test email all you need to do is hit the Save button. Make sure you check the Embed Images box if you want to the images embedded, or leave blank for linked images.

Images

Images in a mail can be included in two forms: linked and embedded, see the next section for the pros and cons for each. To include them in a mail, simply put them in your HTML as you would any ordinary image. If you want to embed images you need to upload them into the VML system using the upload facility. To use images on the server you should adjust the source location in your HTML (i.e. the big between the quotes in) to either imagefiles/imagename.gif or imagefiles/subfolder/imagename.gif.

Any images that are imported from a remote location are automatically stored in a sub-directory with today's date (with the format yyyymmdd).

Linked vs Embedded Images

As previously mentioned there are two ways to include images in an email, linked and embedded. Linked images are those which remain on a web server and are referenced by a full URL (e.g. http://www.yoursite.com/images/logo.gif). When someone opens your email the browser fetches the image from the server. This is good for keeping your images small, or if you want to use changing images, for example. Linked images can be used to verify if an email is opened or not and is a technique used by spammers (and legitimate people) to find working email addresses. Because of this, many email clients block linked images initially because they want to protect your privacy, so you have to manually click to accept the images. This can mean that your email can look very disjointed on first view. It also means if the site has hotlink protection installed or the user doesn't have a connection to the internet at that time, it will not be able to show the image at all.

Embedded images are essentially attached to the email and are downloaded along with everything else so they are shown immediately when an email is opened. This is great if you want to make an impact with a good looking mail containing lots of images. Unfortunately, as the images are attached, it increases the size of the email, which makes it slower to download and can trigger spam filtering software or simply get bounced (returned) if it's too big.

Which one you choose can depend on a number of things. Viewfinder Mailing List supports both types of images.

Dispatching a Mail

Once you have finished constructing your mail and uploaded any embedded images, select the mailing list you want to send to from the dropdown, choose whether you want to send it immediately (note that this may not go instantly depending on how you have set up your system) or select At the following time and pick a date and time using the dropdowns to send at a pre-defined date and time. Then hit Send Email.

You can check your email has queued okay on the Send Queue page and can monitor it from there until it has been completely sent when you can use the Reports page to see how it got on.

Templates

The Templates page can be used to construct and edit new and existing templates in the VML system. It operates in much the same way as the edit screen of the Send page.

Creating a Template

One of the options you will see on the Templates page is Create New, this is used when you want to create a brand new template. Clicking on the link will transfer you to the edit screen, just enter a name for the template in the name field and paste the HTML of the template into the Body box.

You can also upload any images in the template into the system using the Upload Images button.

The Preview button will allow you to see a preview of the template, whether it has been saved or not, or you choose to Save or Delete (only for existing templates).

Editing or Viewing a Template

Once a template has been saved it will appear on the main Templates page. Simply click on the title and the edit screen will appear with the boxes filled in with the template name and HTML. You can edit any of this information or use the Preview button to see a preview of the template.

You can also upload any images in the template into the system using the Upload Images button.

You can delete the template using the Delete button.

If you make any changes make sure to hit the Save button to save them, but be aware that this will overwrite the saved data

Template Tags

You can use tags in a template to substitute dynamic data (such as recipient name), check out the Templates Tags under Sending a Mail for more information.

Archives

The Archives page shows details of all the mails which have been sent by the system, this includes the date sent and the subject of the email. You can also see take a look at en example of the email that was sent, or delete a mail from the archives.

User Management

VML allows you to create multiple users who can login to the admin area and perform tasks based on their user level. The User Management page lists all the users on the system, and allows you to create, edit and remove user accounts. You can also set permissions for each user.

Creating a User

By default, there will always be an admin user account, but if you want to create other accounts to allow different people to login and use the system just enter their username and password in the Create New User section, select a user level from the dropdown and hit Create User.

User Levels

There are five different user levels you can apply with varying degrees of access to the functions within VML. The various levels and their access rights are as follows:

Description	***Privileges***
Read	Access archives, view list subscribers, export list, view reports
Templates	Create, amend and edit templates, access archives, view list subscribers, export list, create list, add recipients, upload list, view reports
Send	Create, save and send mail, create, amend and edit templates, access archives, view list subscribers, export list, create list, add recipients, upload list, view reports
Users	Create, edit and delete users, bulk update, bulk remove, delete subscribers, create, save and send mail, create, amend and edit templates, access archives, view list subscribers, export list, create list, add recipients, upload list, view reports
Admin	View and remove items from the send queue, view and edit system options, create subscribe/unsubscribe forms, create, edit and delete users, bulk update, bulk remove, delete subscribers, create, save and send mail, create, amend and edit templates, access archives, view list subscribers, export list, create list, add recipients, upload list,

view reports

Editing User Details

To edit a user's details, go to the User Management page and select edit for the relevant user. On the following screen you will be able to edit the user's username, password and user level. Leave the password blank if you do not want to change it.

Deleting a User

To delete a user, visit the User Management page and click on Delete in the relevant row. This will completely remove a user from the VML system.

Custom Fields

Although there are several standard fields in VML (email, first name, last name, preferred format), but to allow you to store other data you may wish to collect you can create any number of custom fields to store whatever you wish. The Fields page allows you to review, edit or delete any existing fields and create new ones. Custom fields are applied to all lists automatically and can be added at any time.

Creating a New Custom Field

To create a new custom field, go to the Fields page, find the Create New Custom Field section, type the name you want to call the field in the Field Name box and hit Create Custom Field. You can then add data to the field either by uploading via a spreadsheet, editing a specific user's details or by creating a new form with the field for new users to fill in when they subscribe.

Forms

The Forms page provides you with the ability to quickly and easily generate the code needed for subscribe and unsubscribe forms. This can be done for different lists to allow specific sign-ups and you can also specify which fields a subscriber needs to fill in.

Creating a Subscribe Form

To create a subscribe form for one of your lists, head to the Forms page and click on Subscribe Form next to the appropriate mailing list. The email address is always included in the form, but on the next screen you can select which other fields you want to include, simply check the box next to the field to include it (or uncheck it to remove it), then hit Create Form. Any custom fields you have created will appear on the list and you will be able to select them too. On the next screen you will see a box containing the form code you need to create the subscribe form, simply paste this into whichever web page you want the form to appear.

Creating an Unsubscribe Form

To create an unsubscribe form for one of your lists, head to the Forms page and click on Unsubscribe Form next to the appropriate mailing list. This will create a form where subscribers can enter their email address to remove themselves from the relevant mailing list. On the next screen you will see a box containing the form code you need to create the subscribe form, simply paste this into whichever web page you want the form to appear.

Reports

The Reports page allows you to access reports for each of the mailings you have sent.

Viewing a Report

To see the report for a specific mailing, go to the Reports page, then click on the name of the mailing. This will take you to a report screen with details of the date and time it was sent, which mailing list it was sent to, how many emails were sent in total, how many of each type (HTML or text) were sent, the number of tracked opens and the percentage of the total emails that have been opened. You can also review what the email looked like.

Send Queue

The Send Queue page allows you to see what is currently still in the queue to be sent, you can also delete mailings that have not yet been sent. The page shows details of the mailing subject, sent to list, the number of people on the mailing list, the number still in the queue and the percentage of the list so far despatched to.

Deleting a Mailing from the Queue

If you want to delete or remove a mailing that has been sent you can see if it is still in the queue by visiting the Send Queue page. This will list all of the mailings currently in the queue. To delete a mailing simply click Delete on the appropriate row.

Options

The options page displays and allows you to edit the different VML install options, see the installation section for full details of what each of the options means.

Setting up Cron

In order to send emails you need to get the server to execute the **delayed_send.php** file at regular intervals, this will process the send queue and actually despatch the emails. It is recommended this be done by using the built-in Cron functionality on a unix/linux-based server (or similar). Alternatively, if you do not have access to this functionality you can use Pseudo-Cron.

I would suggest setting the script to run at least once an hour every day (every 15 or 30 minutes might be better still) but the choice is up to you.

Many web hosts use CPanel as their use administration panel, you can find out how to add Cron jobs in CPanel here: www.cpanel.net/docs/cpanel/

Pseudo-Cron

Information about Pseudo-Cron and how to use it can be found online at: www.bitfolge.de/pseudocron-en.html