WideNARROW

Newsletter Guide

Guide for Superusers
Manual Newsletters and Automated Newsletters

This step-by-step guide helps you to produce a newsletter in the Newsletter module.
You can create both **Manual newsletters** and **Automated newsletters** in the same feature.

Creating a new Newsletter Series

When creating a newsletter for the first time, start by creating a new newsletter series.

1. Navigate to the **Newsletter** tab in the main menu.

2. On the Newsletter Series overview page: Click the **New newsletter series** button at the top right of the page.

In the **Create new newsletter series** window:

3. Enter the name of the newsletter series in the **Name** field.

4. Optional: Enter a description of the newsletter series in the **Description** field.

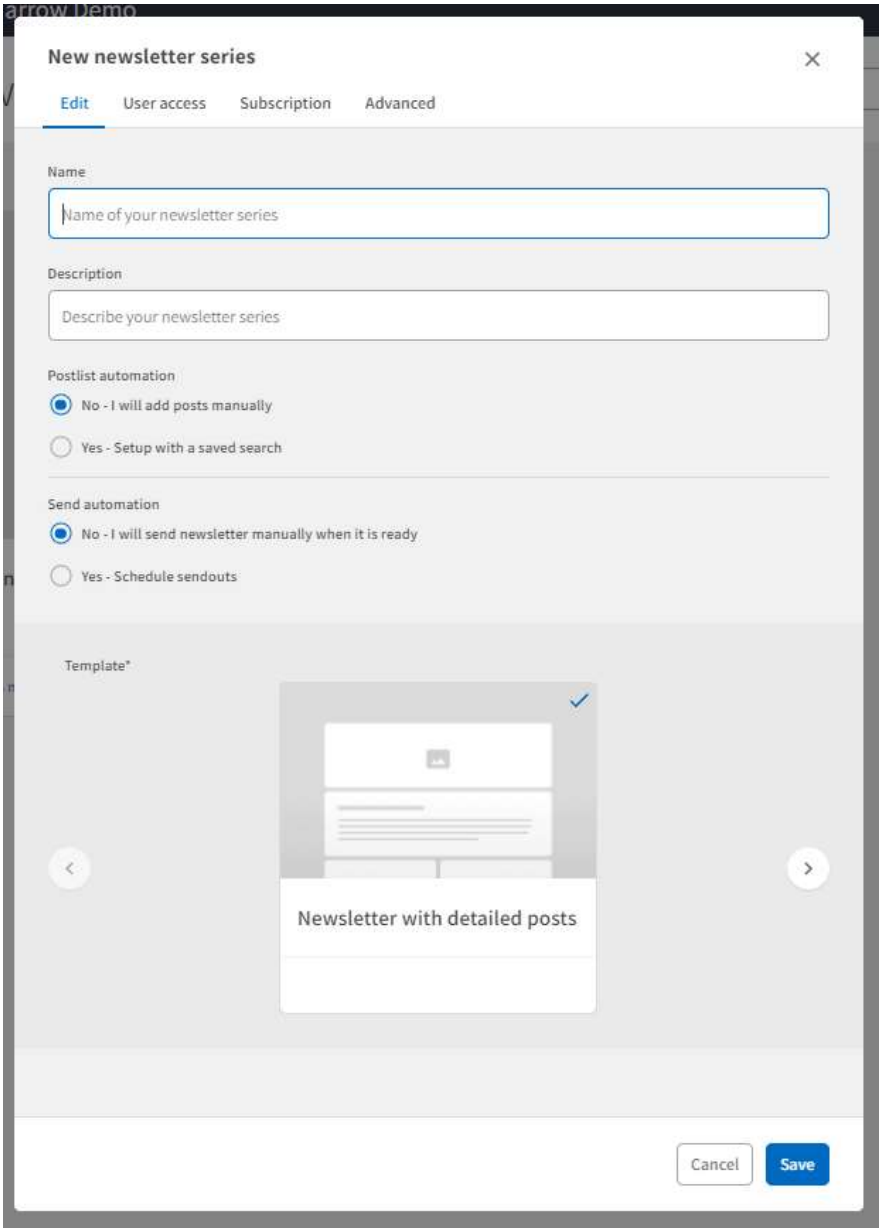
5. Click **User access** in the top menu and select users or user groups to give co-producers access to the newsletter.

6. Optional: Click **Subscription** in the top menu to make the newsletter subscribable to other users. Select **Open** to make it available for all users on the Subscriptions page. Select Closed to make it available for selected users.

7. Click **Edit** to return to the Edit window.

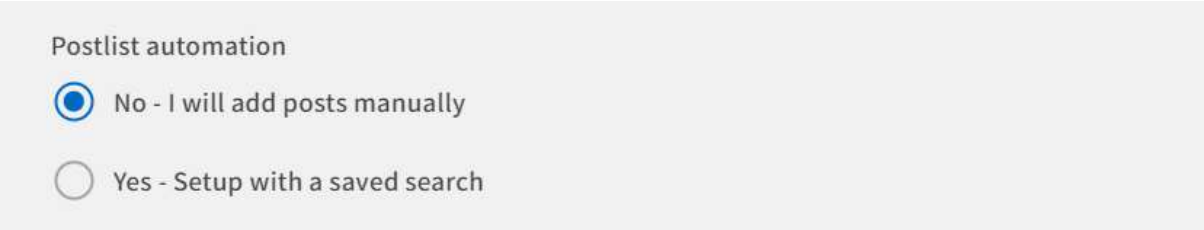
8. Click the template tile to **preview** the template options. The preview pages allow you to preview the templates before selecting a template. Switch between the computer and mobile icons to see how the newsletter templates look on different

screens. Select a template by clicking a template tile and then click **Use this template**.



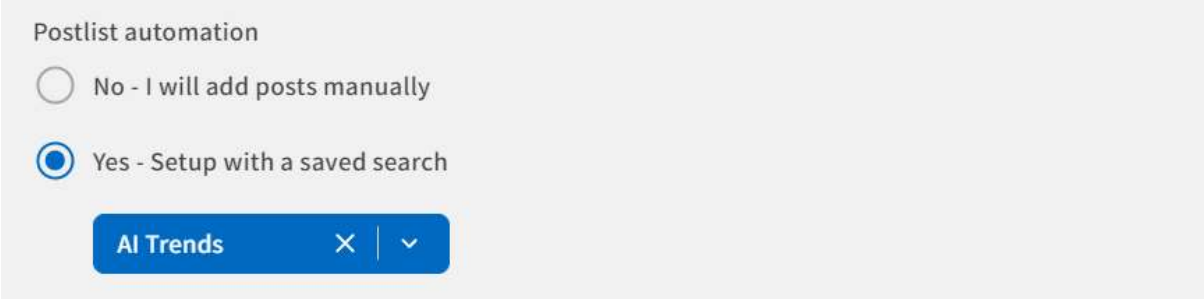
Manual post list population:

9. Select **No – I will add posts manually** to the newsletter.



Automated post list population:

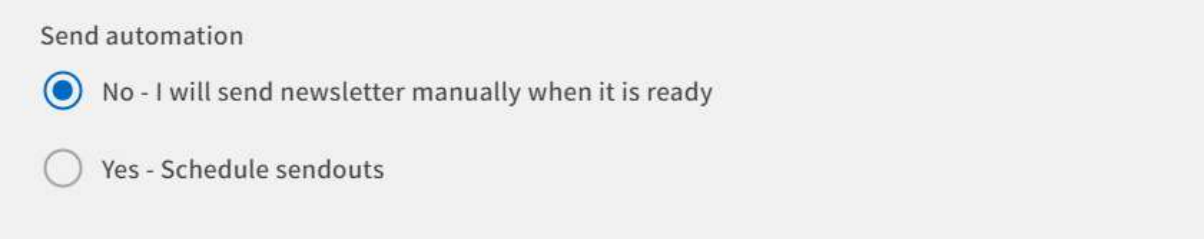
10. Select **Yes – Setup with a saved search** to add posts **automatically** to the newsletter. Select an available saved search in the drop-down menu to populate the newsletter.



If you want to create a new saved search to connect to your newsletter post list:
Go to **Search** and define your search by the **Filter categories**. Save the Search as a **SYSTEM saved search** to make it available for Automated Newsletters. Review the saved search to ensure that your saved search is based on qualified information of high quality and relevance.

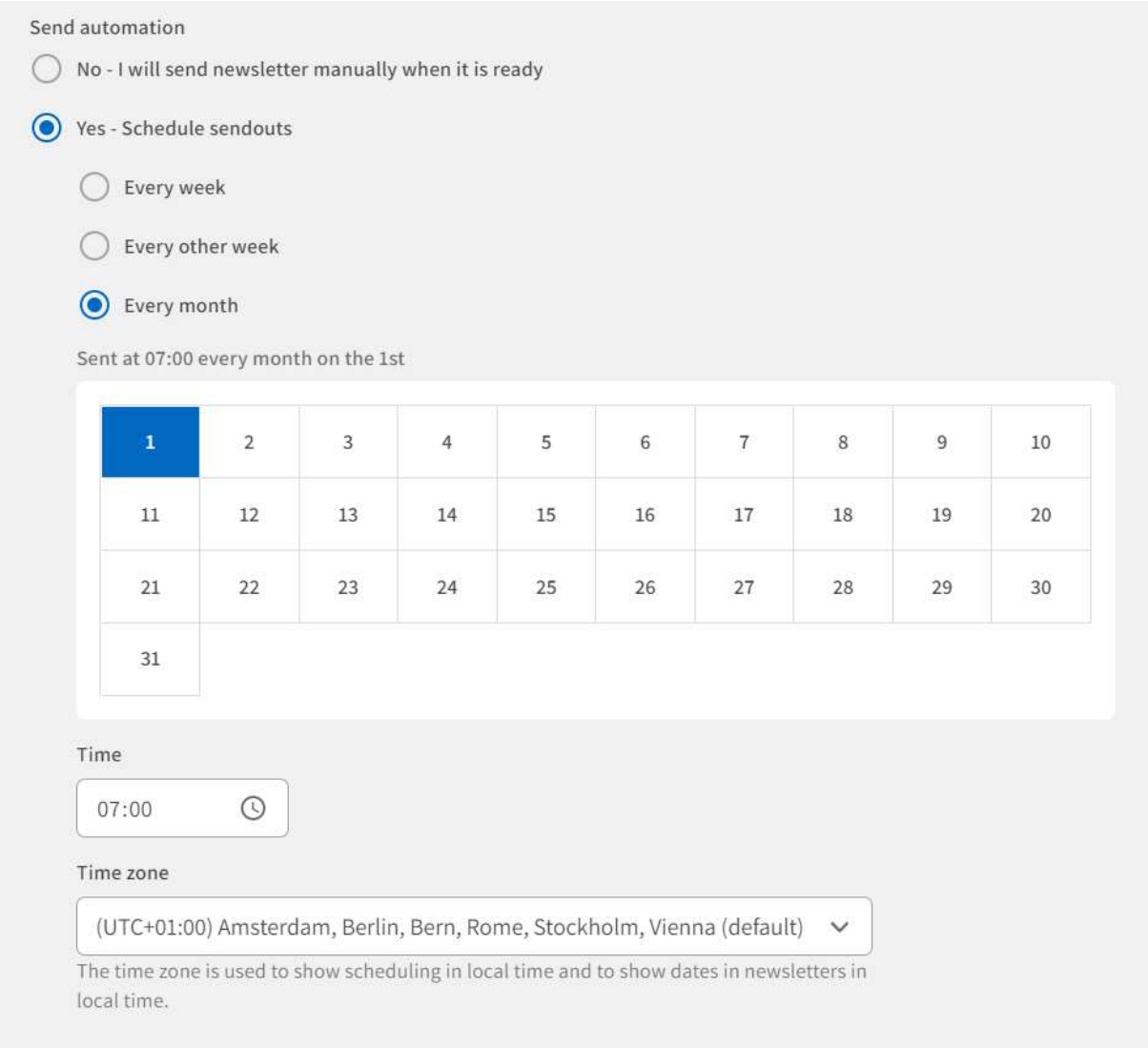
Send Manually:

11. Select **No – I will send the newsletter manually when it is ready** to send the newsletter manually.



Send Automatically:

12. Select **Yes – schedule sendouts** to schedule an Automated Newsletter.
    Choose how often you want to send out your newsletter by selecting month, dates, week, and weekdays.
    Select the send-out time by clicking on the clock icon under **Time**.
    Select the time zone in the **Time zone** drop-down list. Time zone shows the scheduling and dates in newsletters local time.



Customize the newsletter layout

Besides the basic settings, the newsletter templates are composed of **customizable sections**. There are four types of sections; banner, headline, post list, and footer.
You can style each section (text style, background colors, text and image positions, and other layout details) and save it as a new section template.

CREATE

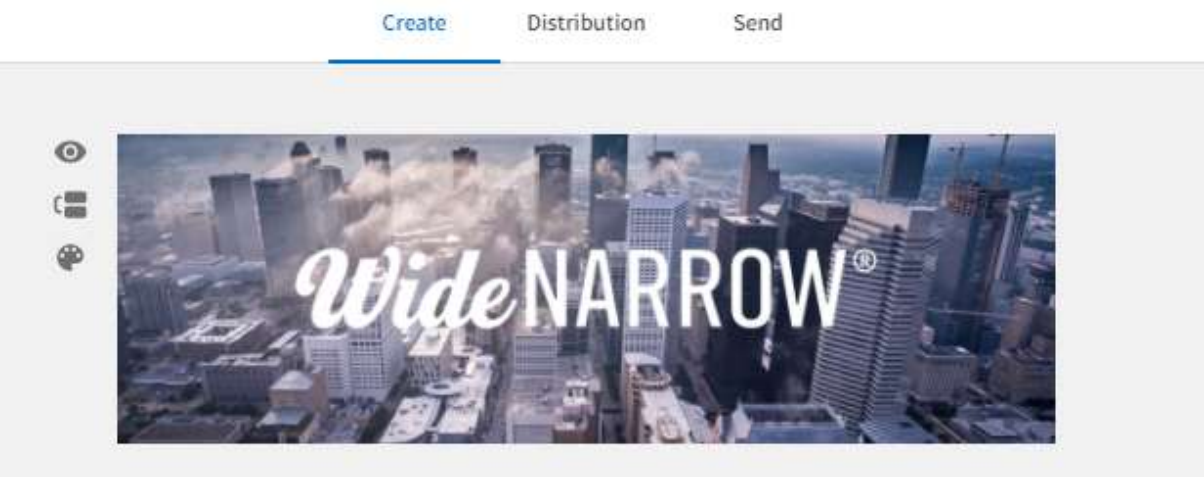
Basic settings

On the Create page:

1. Click the **palette icon** in the menu on the banner's left to select the fonts, the font size and background color of the newsletter. Click **Save**.

2. Add a new font by clicking the displayed font and then **Custom font** at the bottom of the drop-down list. Enter the font name. Click **Save**.

While working on the newsletter, click the **eye icon** to preview the newsletter and the **row icon** to toggle view for a better overview.



Banner section:

1. Mouse over the **Banner section** to display the banner section menu. Click **Edit** (the pencil icon) to open the banner section.

2. Remove the default banner image by clicking the **cross** below the banner image. Add a banner image or click **Find image** to find an image in the in-app image library.

   Alternatively, click on **Background color** to use a color as a banner. Add a custom color by selecting **Custom color** in the Background color drop-down list and then click the color box to open the color scheme. Add the RGB, HSL, or HEX color code, or use the slider and pen to set a color.

   Alternatively, click **Replace section Template** and select another existing banner template from the banner library. Click **Replace** on the selected banner, and **Yes, Continue** to confirm.

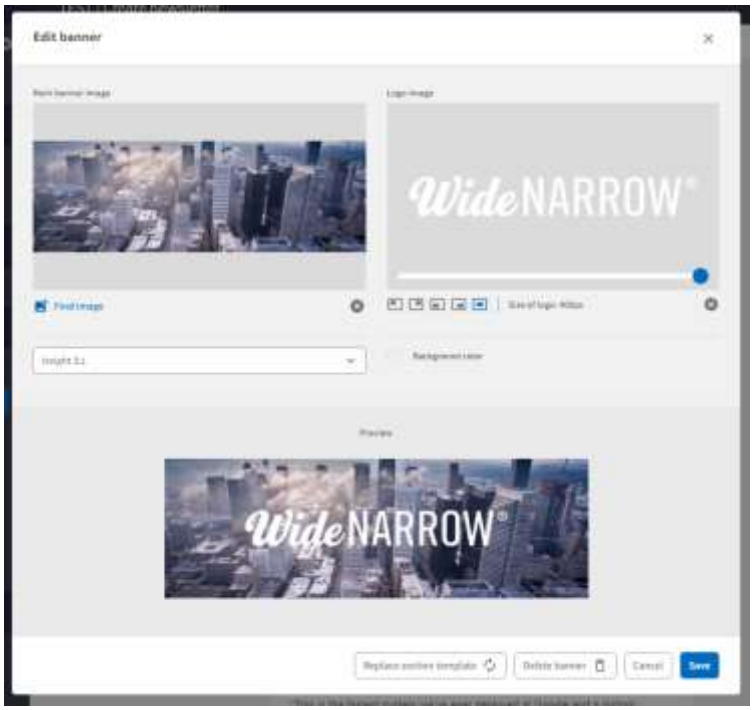
3. Select the **banner height** in the drop-down list.

4. Remove the default logotype by clicking the **cross** below the logotype.
   Click to add a logotype and adjust the size of the logo with the **slider**.
   Position the logo on the banner image by clicking the **position icons**.

5. Preview the section layout and then click **Save**.

6. To save the banner section as a template, open the banner section menu, click **More** (three dots), and then Save as a **template**.

7. To remove the **section margin** between the banner and the next section, open the banner section menu and click the **Margin** icon (two arrows).



Headline section:

1. Mouse over the **Headline section** to display the headline section menu.
   Click **Edit** (the pencil icon) to open and edit the headline section.

   Alternatively, click **Replace section Template** and select another existing Headline template from the Headline library. Click **Replace** on the chosen headline, and **Yes, Continue** to confirm.

2. Enter a title and introduction in the text box. Style the text (e.g., size, color, position, hyperlinks).

3. Tick the **Separator** checkbox to add a separator at the bottom of the Headline section.

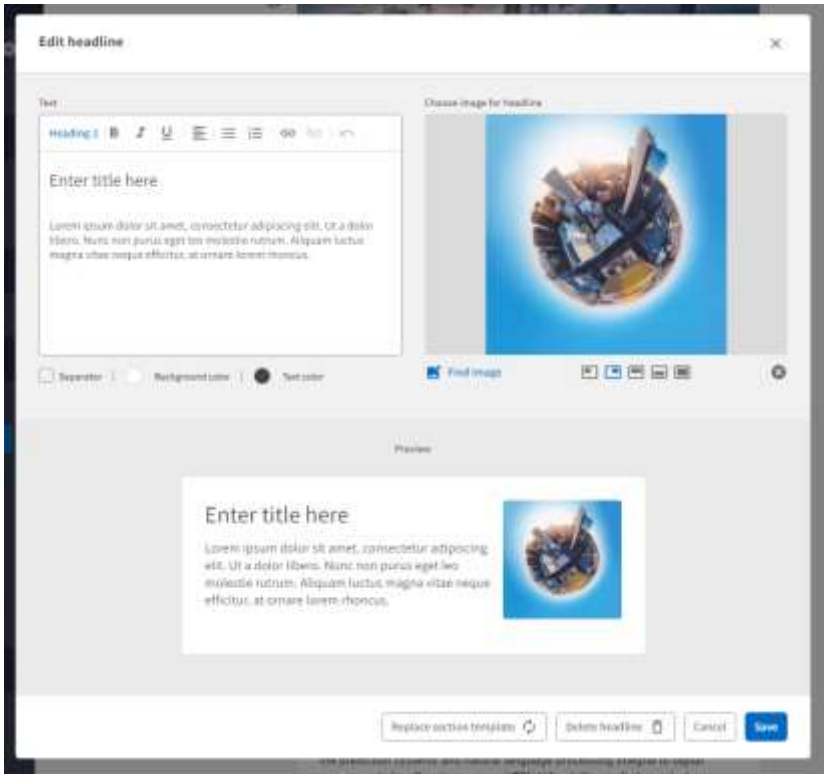
4. Choose a background color by clicking **Background color.**

5. Add a headline image or click **Find image** to find a picture in the in-app image library. Position the image by clicking the **position icons**.

6. Preview the section layout and then click **Save**.

7. To save the headline section as a template, open the headline section menu, click **More** (three dots), and then Save as a **template**.

8. To remove the **section margin** between the headline and the next section, open the headline section menu and click the **Margin** icon (two arrows).



Post list section:

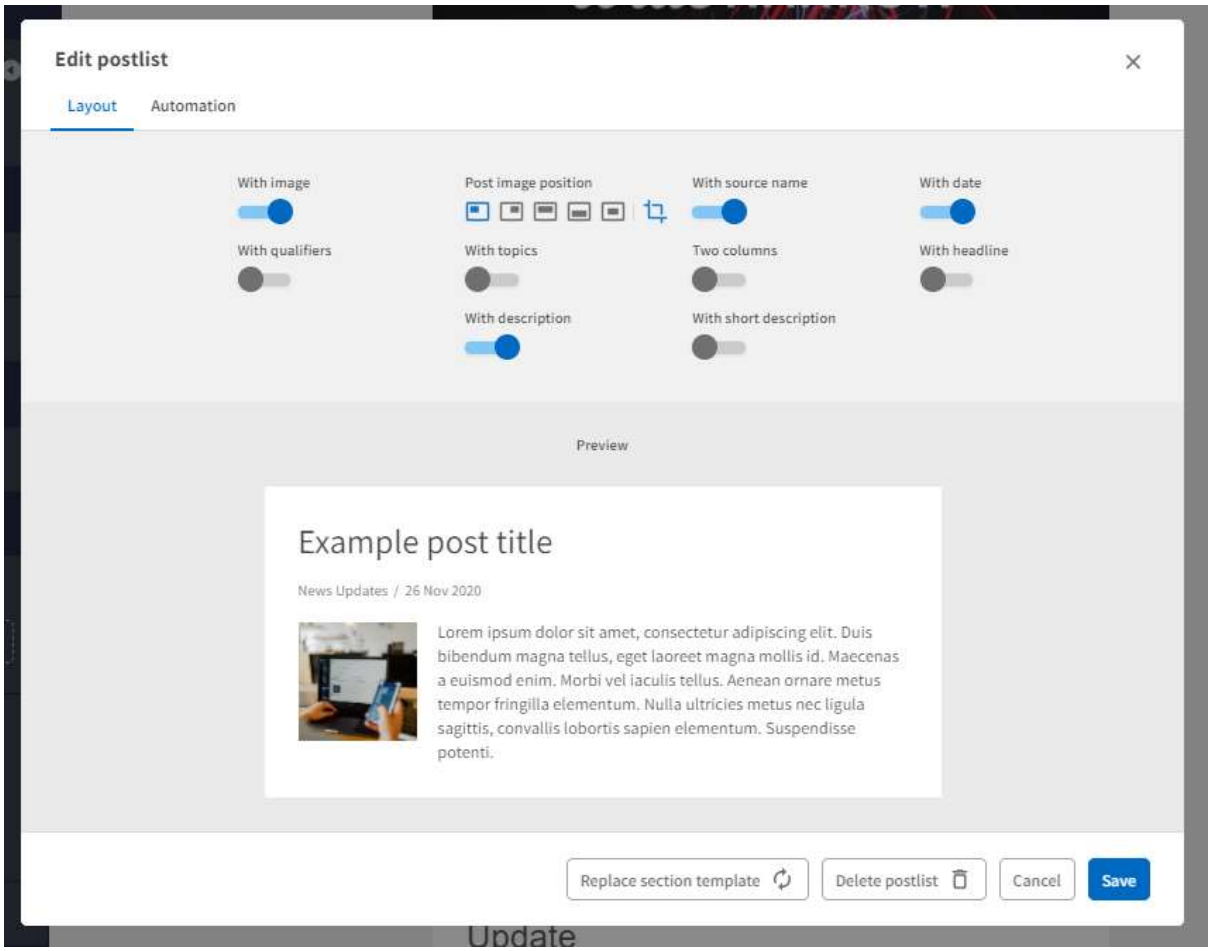
1. Mouse over the **Post list section** to display the post list section menu.
   Click **Edit** (the pencil icon) to open the **Edit Post list** window.

2. Customize the post list layout in the **Layout** view:
   Switch the **toggle buttons** to show or hide elements in the posts.
   Select the default image position.
   Note that you can still change the layout per post in the post list.

You can also add several post-list sections with different layouts.

3. Preview the post layout and then click **Save**.

4. To save the post list section as a template, open the post list section menu, click **More** (three dots) and then **Save as a template**.



Automated Newsletters:

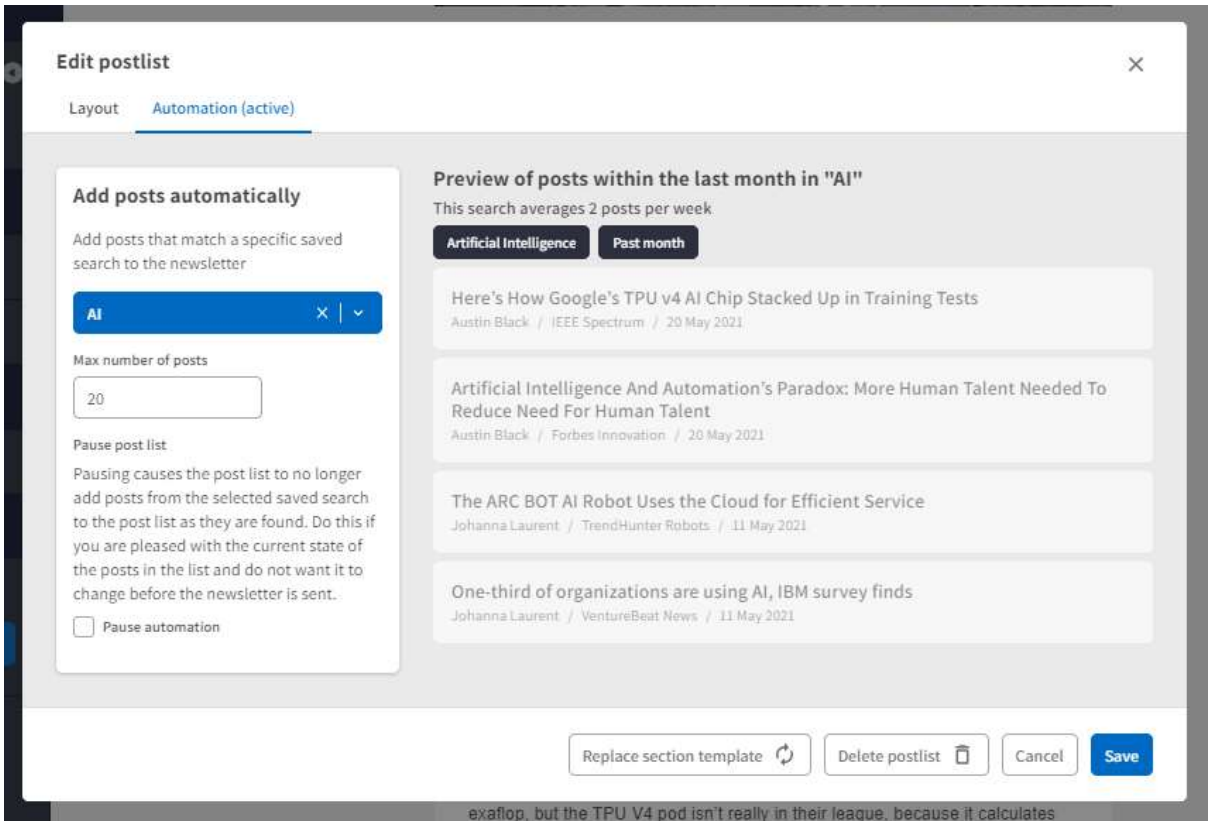
5. Click **Automation** to preview and the automated post list.
   A preview of the posts included in the selected saved search is visible to the right.

6. Change the saved search to populate the post list by selecting another saved search in the blue drop-down list to the left.

7. Select the maximum number of posts to include in the newsletter in the drop-down list to the left.

8. Check the **Pause Automation** checkbox to pause posts from the selected saved search to populate the newsletter automatically.

9. Click **Save** to confirm the adjustments.



Footer section:

1. Mouse over the Footer section to display the Footer section menu.
   Click **Edit** (the pencil icon) to open and edit the Footer section.

2. Edit the default footer section or click **Replace section Template** and select another existing footer template from the footer library. Click **Replace** on the footer, and **Yes, Continue** to confirm.

3. Enter a footer text in the text box. Style the text (e.g., size, color, position, hyperlinks).

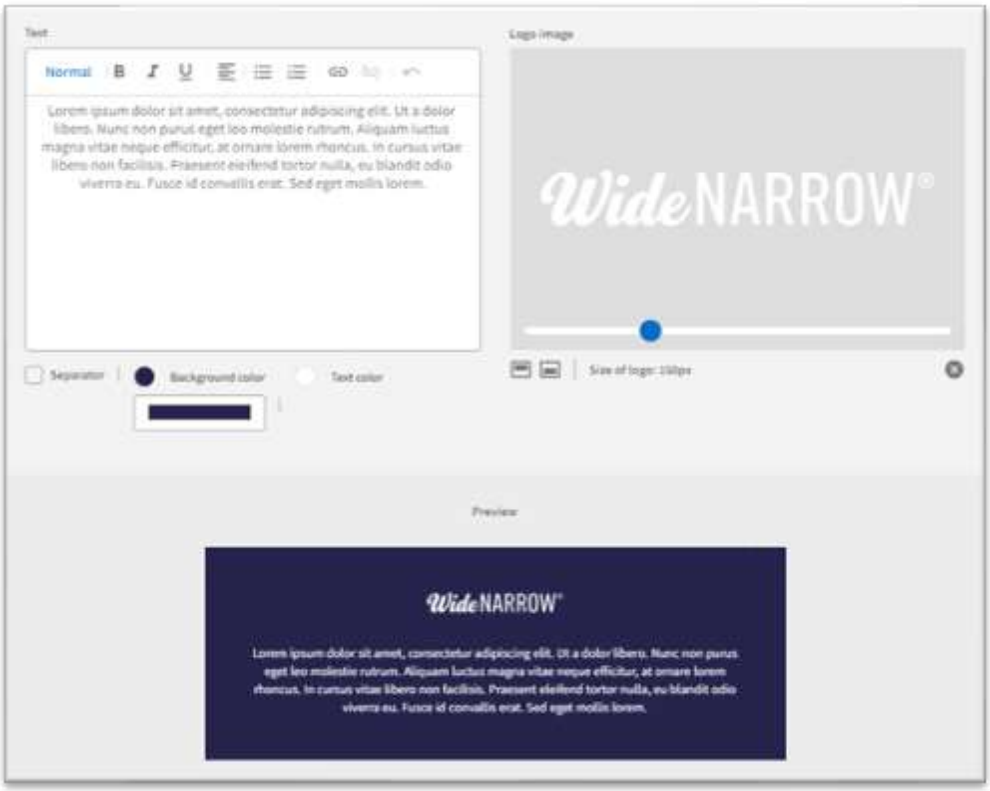
4. Tick the **Separator** checkbox to add a separator at the bottom of the footer.

5. Choose a background color by clicking **Background color**. Add a custom color by selecting **Custom color** in the Background color drop-down list and then click the color box to open the color scheme. Add the RGB, HSL, or HEX color code, or use the slider and pen to set a color.

6. Remove the default logotype by clicking the **cross** below the logotype.
   Click the logo image box to add a logotype. Adjust the size of the logo with the **slider**. Position the logo by clicking the **position icons**.

7. Preview the section layout and then click **Save**.

8. To save the Footer section as a template, open the Footer section menu, click **More** (three dots) and then **Save as a template**.



Add a new section

1. Add a news section by clicking the blue **Add section** button.
   Or open a section menu, click **More** (three dots) and then select **Add new section below** or **Add new section above**.

2. Choose a section (banner, header, post list, or footer) and then select a section template. Click **Add** to add the template.

Populating the post list section with posts:

Manual Newsletters:

1. Populate the newsletter by dragging and dropping posts from Search, Inboxes, or Clusters to the newsletter drop-zone in the black left menu.
   To create a drop-zone in the menu: go to the Newsletter series overview page and click the newsletter card's pin icon.

2. When ready, click the drop-zone to open the newsletter. Now you can review and edit the populated post list.

3. Mouse-over a post to display the Edit post menu. Click **Edit post** to open the Edit post form. Edit the post and click **Save**.

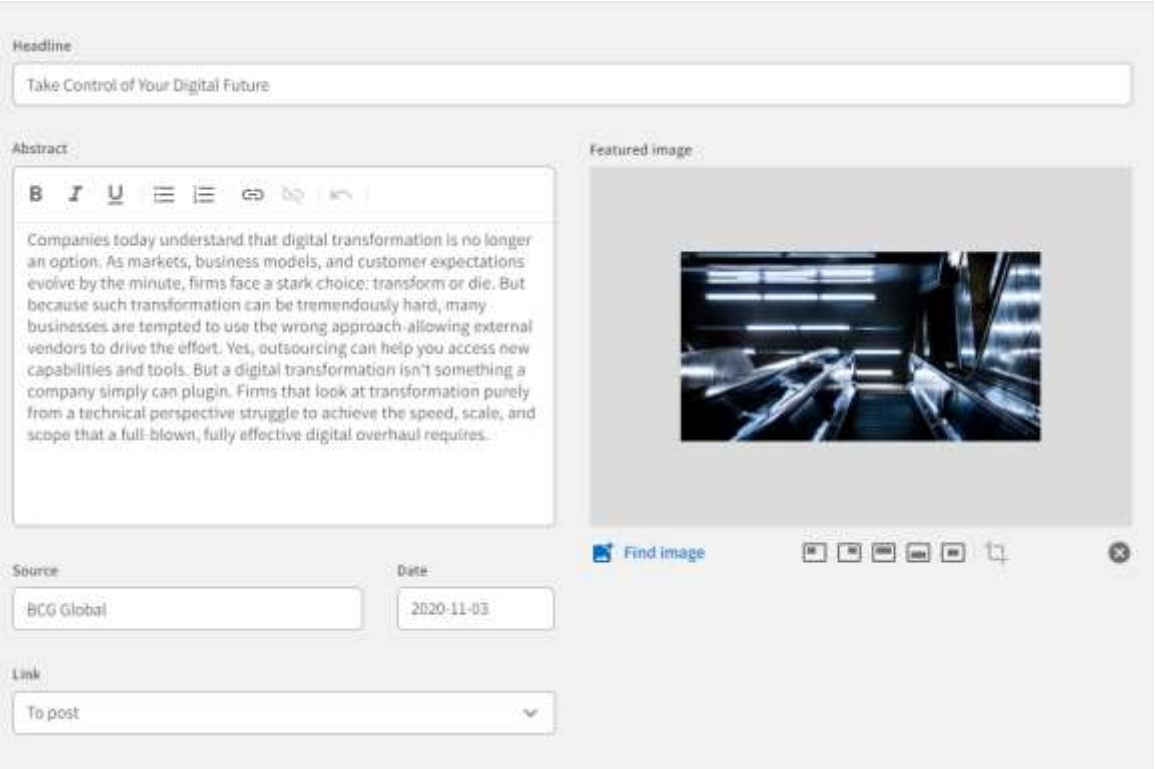
4. Click the blue **New post** button to add a new post with your text and image. Click **Save**. The new post will automatically be added to the post list.

5. **Move a post in the post list:** Mouse over the post and click the up and down arrows.

6. **Add a new post list:** Open the post list section menu, click on the More icon and then select **Add new section below** or **Add new section above**. Select a new post

list section template. You can now move posts from one post list to another.

7. Click the **eye icon** to the left of the banner section to **preview** the newsletter post list. Click the **row icon** to **toggle block view** and move posts up and down in the post list.

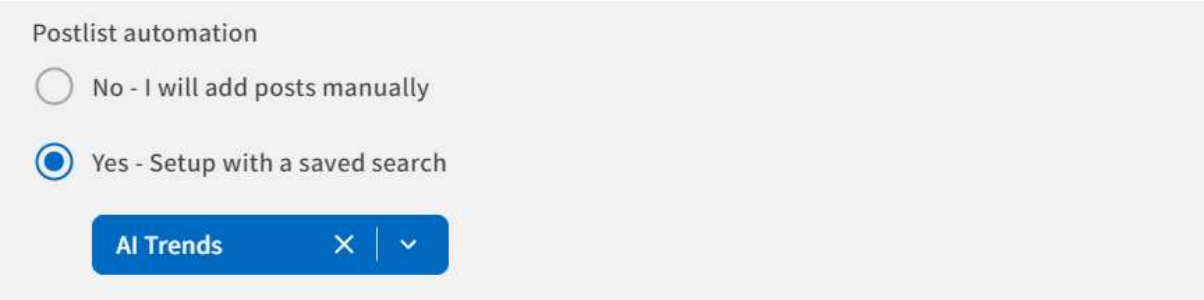


Populating the post list section with posts:

Automated Newsletters:

1. Select **Yes – Setup with a saved search** to add posts **automatically** to the newsletter.

2. Choose an available saved search in the drop-down menu to populate the newsletter.



3. If you want to create a new saved search to connect to your newsletter post list:
    - Go to **Search** and define your search by the **Filter categories**.
    - Save the Search as a **SYSTEM saved search** to make it available for Automated Newsletters.
    - Review the saved search to ensure that your saved search is based on qualified information of high quality and relevance.

To review and edit the layout of the auto-populated post list:

4. Open the newsletter and mouse over the **Post list section** to display the post list section menu. Click **Edit** (the pencil icon) to open the **Edit Post list** window.

5. Customize the post list layout in the **Layout** view:
   Switch the **toggle buttons** to show or hide elements in the posts.
   Select the default image position.
   Note that you can still change the layout per post in the post list.
   You can also add several auto-populated post-list sections with different layouts.

6. Preview the post layout and then click **Save**.

7. To save the post list section layout as a template, open the post list section menu, click **More** (three dots) and then **Save as a template**.

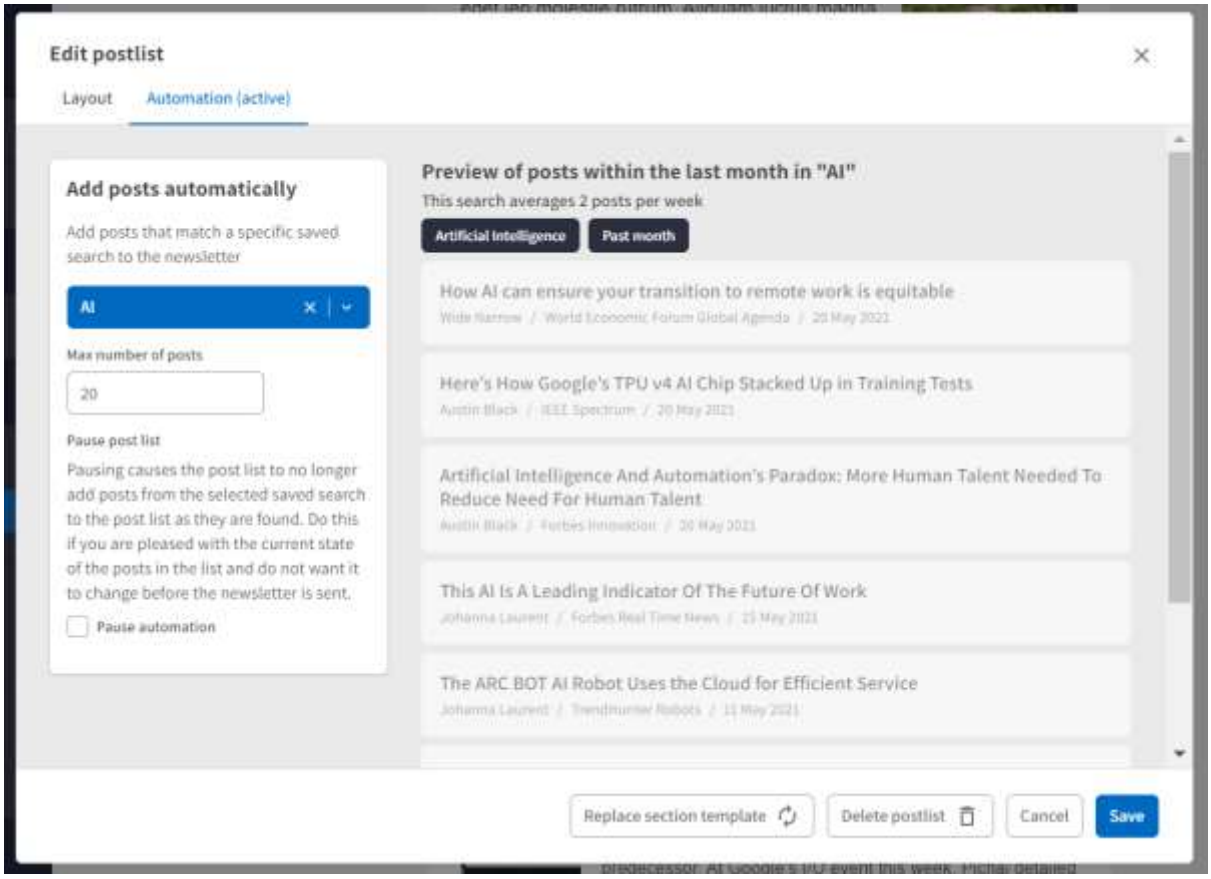
8. Click **Automation** to preview and edit the automated post list.
   A preview of the posts included in the selected saved search is visible to the right.

9. Change the saved search to populate the post list by selecting another saved search in the blue drop-down list to the left.

10. Select the maximum number of posts to include in the newsletter in the drop-down list to the left.

11. Tick the **Pause Automation** box to pause posts from the selected saved search to populate the newsletter automatically.

12. Click **Save** to confirm the adjustments.



Preview the newsletter

Click the **eye icon** to preview the newsletter and do a final edit. On the preview page, switch between the **computer** and **mobile screen icon** to preview how the newsletter looks on different devices.

Click the **row icon** to toggle block view. Change the order of sections and posts by using the up and down arrows.

When the newsletter is ready, click the blue Continue button to go to the Distribution step.

DISTRIBUTION

On the Distribution page, send lists are created and managed. Also, fill in the information to be visible on the recipient's email when receiving the newsletter.

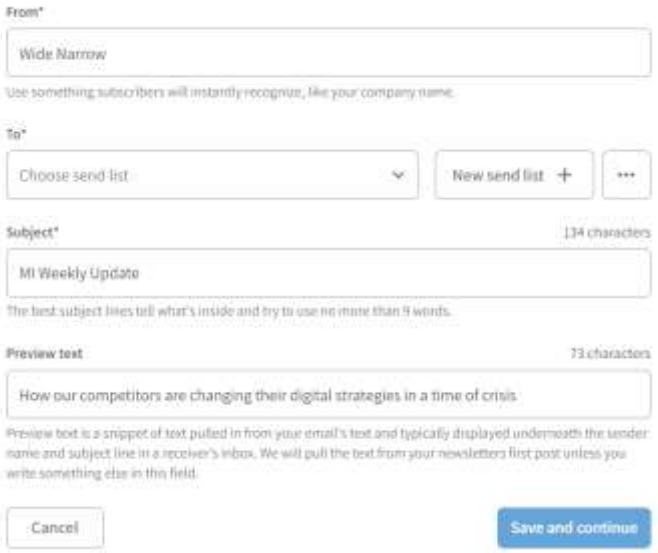
Sender and subject

On the Distribution page:

1. Enter your company name or another proper sender name in the **From** field.

2. Enter the name of your newsletter or another subject in the **Subject** field.

3. Optional: Change the Preview text by replacing the displayed text.
   Copy and paste text from the newsletter to replace the default text.



Recipients and send lists

Using an existing send list

On the distribution page:

1. Connect an available send list to the newsletter by clicking **Choose send list**.

2. Search send list or select a send list in the drop-down menu.

3. Click **Save**.

Creating a new send list

On the distribution page:

1. Click **New send** list to create a new send list.

2. In the **New send list** window: Enter a name and description of the send list.

3. Click **Add members**.

4. Search and select users by ticking the checkboxes in the left list of portal users. Use the **filter icon** to filter users by user group (Admin, Superusers, End-users, or recipients).
   Drag and drop the selected members to the new send list drop-zone.

5. Add new recipients by clicking the **Add people icon**. Enter email addresses separated by a comma, and then click the **Plus icon**.

6. Remove a member of the send list by ticking the checkbox beside the recipient name and then click **Remove**.

7. Click **Save** to save the new send list.

Edit a send list

On the distribution page:

1. Click the **More icon** (three dots) and then **Manage send lists**.

2. In the **Manage send lists and recipients** modal window, click a send list to open it for editing.

3. In the Edit send list modal window, click **Members**.

4. Add new members by checking the checkboxes of the users you want to add from the user list to the left. Click the **Add** button to add the selected users to the send list to the right.

5. Delete recipients by checking the boxes of the members you want to add from the send list to the right. Click the **Remove** button to confirm.

6. Click **Edit** to change the name or description of the send list.

Delete a send list

On the distribution page:

1. Click the **More icon** (three dots) and then **Manage send lists**.

2. In the **Manage send lists and recipients** modal window, click the **More icon** (three dots) at the far right of the selected send list line, and then the **Dust-bin icon**.

Duplicate a send list

On the distribution page:

1. Click the **More icon** (three dots) and then **Manage send lists**.

2. In the **Manage send lists and recipients** modal window, click a send list to open it for editing.

3. Select **Edit**.

4. Click **Duplicate send list** to clone the send list.

5. Click **Yes, continue** to confirm duplication.

Manage recipients

On the distribution page:

1. Click the **More icon** (three dots) and then **Manage send lists**.

2. In the **Manage send lists and recipients** modal window, click **Recipients**.

3. Search or scroll to find and edit recipients and connected send lists.

4. Tick the checkboxes to select recipients.
    a. Click the **dust-bin** to delete chosen recipients.
    b. Click the **people icon** to add or remove recipients from a send list.

5. Click the recipient name to see and edit recipient details.

6. Click **Save** to save changes.

SEND

On the Send page, you can preview, test send, and send the newsletter.

1. Click the newsletter preview window to preview the newsletter.

2. In the preview window: switch between the **computer** and **mobile screen icon** to preview how the newsletter looks on different screens.

3. Click **Test send** to send a test newsletter. Add the email address to the test recipient and click **Test send**.

4. Click **Send** to send the newsletter. Click **Cancel** to send the newsletter later.

Automated Newsletters:

5. Click the **Schedule delivery** button to schedule the newsletter send-outs.

Resend a Newsletter

1. Click the **Statistics icon** on the newsletter page's top right.

2. Click the newsletter tile of a sent newsletter you want to resend.

3. Scroll down to the bottom of the newsletter and click the **Resend newsletter** button.

4. Select recipients and then click **Send**.
   OR click the **Edit newsletter** button to edit the newsletter before resending.

Newsletter Statistics

Click the **Statistics icon** on the newsletter page's top right to check the number of receivers and opened newsletters.

Click any newsletter tile to view previously sent newsletters.

Scroll down to the bottom of the newsletter and click the Resend newsletter button.