

6.1.5 “Create Newsletter” wizard

As explained in section 6.1, the create/send procedure can be facilitated with the "Create Newsletter" wizard. In practice, the wizard proposes a 5-step procedure to create a newsletter.



Warning! If you click the "Create Newsletter" button from the Campaign module list view, a new campaign will be created containing the new newsletter.

Steps of the newsletter wizard:

- **Select recipients:** select Target, Accounts, Contacts and/or Leads and filters available
- **Template:** choose one of the existing newsletter templates or create a new one
- **Newsletter data:** information concerning the newsletter transmission (Sender's Name and Address will be visible to recipients, Newsletter Name and Description are vtenext internal data. Note: the email subject is part of the template, step2)
- **Test Email:** display preview and send a test email. In the test email the preset fields will be mapped with the variables.
N.B. The unsubscribe link doesn't work in the test mail while the preview link works correctly.
WARNING: At this very moment, when sending a test email, the CRM calculates the actual volume of emails to be sent. Therefore, it may take a few minutes, especially if the target consists of 20,000 emails or more.
- **Schedule:** send immediately or schedule transmission for a future date / time

N.B. When creating a newsletter using the Wizard you can create a new template or edit an existing one. If you opt for the latter solution, the template created can be used exclusively for the newsletter created with the wizard and not for other newsletters.

Warning: from vtenext 20.04 a **new newsletter editor composer** has been included.

This tool combines different functionalities in order to help users building HTML templates without using code strings. It is a perfect solution to replace the common WYSIWYG editors, which are helpful to change contents but not fit to create HTML structures.

The CRM creates a copy of the original template with the changes made during the wizard, but it is not possible to retrieve the modified template to create other newsletters.

If a search is performed from SETTINGS > EMAIL TEMPLATES, the only template available will always be the original or starting template.

Newsletter Wizard

1 Recipients selection 2 3 4 5

Which recipients do you want to add?

Filter: All Page 1 of 3 Search in Accounts ADD ALL

Account No	Account Name	Billing City	Website	Phone
ACC33	azienda test		test.com	
ACC6	diemovte	San Francisco	www.diemovte.com	(209) 234-9340
ACC29	diemovte	San Francisco	www.diemovte.com	(209) 234-9340
ACC3	EDFG Group Limited	Sunnyvale	www.edfggrouplimited.com	(805) 981-4250
ACC26	EDFG Group Limited	Sunnyvale	www.edfggrouplimited.com	(805) 981-4250
ACC20	ERG	Milano	www.erg.it	02 1234567

Selected recipients

Accounts: All (Filter) Contacts: All (Filter) Leads: All (Filter)

Progress

Recipients: 56
Template:
Test Email:
Newsletter status:

Wizard Step 1 - Select recipients

Newsletter Wizard

< BACK 1 2 Template 3 4 5 NEXT >

Now choose a template or create a new one:

Page 1 of 2 Search in EmailTemplate CREATE

Email Template	Description
GDPR - Default newsletter - EN	The default template used for sending GDPR newsletter
GDPR - Default newsletter - IT	Template di default utilizzato per l'invio della newsletter GDPR
Newsletter	
Tell a friend about VTE	Try VTENEXT and discover the features of the BPM Engine
template newsletter	creatività newsletter desiderabile

Preview

Subject: Try VTENEXT and discover the features of the BPM Engine

Wizard Step 2 - Template

vteneXt Newsletter Wizard

1 2 3 Newsletter fields 4 5

BACK NEXT

Insert newsletter informations:

*Newsletter Name: New version of vtenext is here!

*From Name: Company Name

*From Address: company@domain.com

Reply to address: marketing@domain.com

Description: Discover the [new functions of vtenext!](#)

Progress

Recipients: 56

Template: [AUTO TEMPLATE] My template name

Test Email:

Newsletter status:

Wizard Step 3 - Newsletter data

vteneXt Newsletter Wizard

1 2 3 4 Test 5

BACK NEXT

Send a test email to the following address:

company@domain.com RESEND

Test Email sent correctly

You can also see a preview of the newsletter by clicking one of the following recipients:

PREVIEW NEWSLETTER

Progress

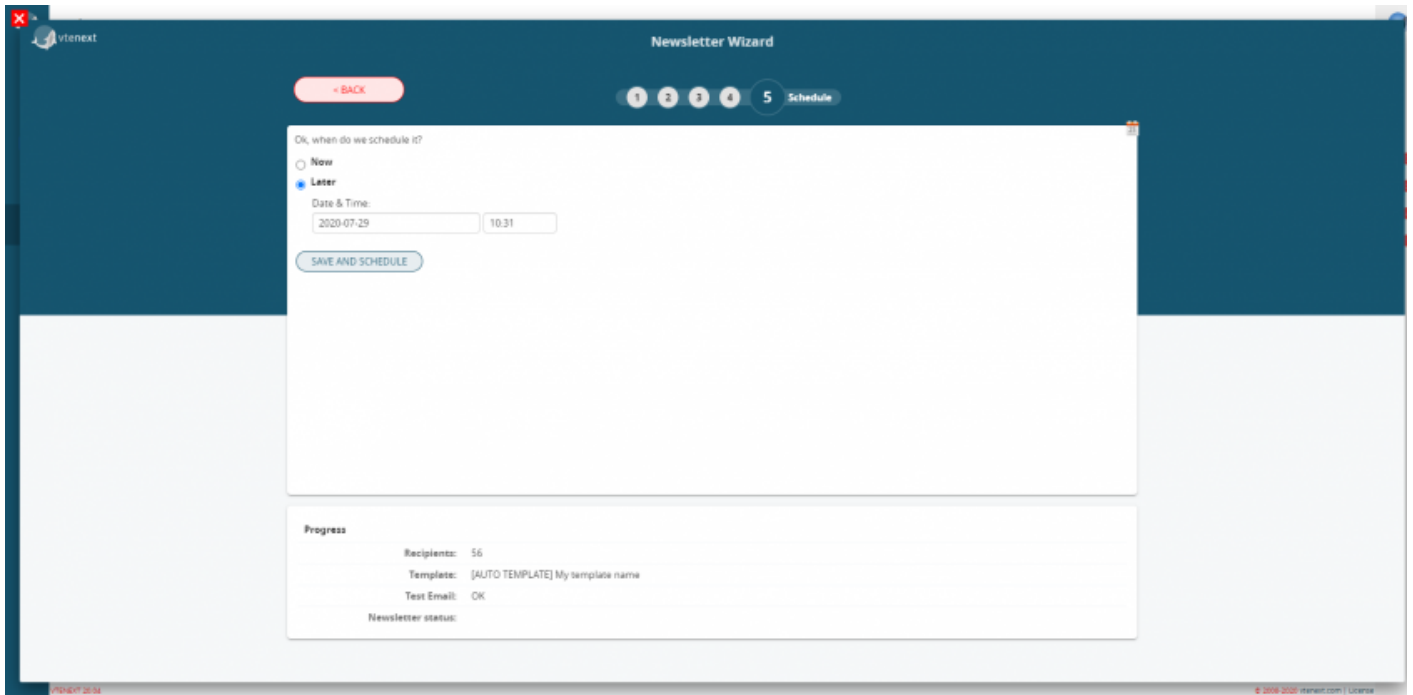
Recipients: 56

Template: [AUTO TEMPLATE] My template name

Test Email: OK

Newsletter status:

Wizard Step 4 - Test Email



Wizard Step 5 - Schedule

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