



Stellar Web Solutions Newsletter Premium V2.1

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Overview

Congratulations on the purchase of the Stellar Web Solutions Newsletter Premium system. The Stellar Web Solutions Newsletter Premium is a full user and administrator interface to conduct subscription mailings for a customer relationship management system. By using this software, you agree to the conditions of the attached licensing agreement. This software is licensed - not sold, please read the license agreement carefully. This software is protected by international copyright, it cannot be redistributed, resold, or transferred in whole or in part in any way.

Requirements

- This software is designed to work on both Linux/UNIX or Microsoft Windows, Linux is preferred.
- Web Server with a Perl CGI and DBI capability – for example: Apache Mod Perl or IIS with ActiveState Perl.
To acquire Apache with mod_perl visit perl.apache.org.
For more information on ActiveState's Perl for Windows see www.activestate.com.
- Database – MySQL 4 or higher is recommended. For using other non MySQL databases you may have to create the database table yourself.
See www.mysql.com for more information about MySQL.
- Sendmail or equivalent.
See www.sendmail.org for more information about Sendmail.
Let us know if you are interested in a SMTP version of this Software.

Package Manifest

The software distribution package contains the following files:

- readme.pdf – this file
- license.pdf – software license
- newsletter-include.cgi – Application configuration file.
- newsletter.cgi – Main user subscription script.
- newsletter-admin.cgi – Administrator script, mailer, export to CSV files.
- newsletter-install.cgi – Installation, database installer, import from flat files.
- countries.txt – Sample option file with a list of countries.

Support

To obtain installation support, we recommend emailing us at support@stellarwebsolutions.net. Otherwise, visit www.stellarwebsolutions.net/html/en/contact.html for more ways to get support.

Installation Services

Contact Stellar Web Solutions to inquire about our Professional Installation Services available.

Features

Newsletter Subscription System for Small Business and Personal Websites - allow your users to sign up to receive a newsletter from your website that conforms to the latest anti-spam safeguards. Stellar Newsletter Premium™ provides a powerful eMarketing solution for your website's users.

Powerful Customization

From the look and feel, to the data fields the user is prompted for. Data fields can be configured to meet any needs - text fields, radio pick lists, option lists from a text file, and checkboxes. Make certain fields mandatory as required.

HTML headers, footers, and everything in between can be customized to maintain the look and feel of your website throughout.

Secure Anti-Spam Subscriptions

- Subscription email accounts are confirmed with a 1-click confirmation procedure over email.
- All sent messages automatically get a 1-click unsubscribe link attached.
- Users can request an unsubscribe email anytime from the main subscription page.
- User IP and date/time is logged at subscription, confirmation, and removal.
- Subscription IP is emailed to the user with the confirmation request to allow the user to track unauthorized registration requests.

Convenient Integration Options for Your Website

- Users can subscribe from any page on your website and then be prompted for additional information.
- Alternatively, users can be linked directly to the subscription CGI page.

Web Based Administrative Interface

- View subscription accounts and modify user's status'
- Customizable administrative report view.
- Password protected system and database status viewer
- Database table builder.
- Web interface to send HTML or text emails to all active/confirmed subscribers.

Personalized Content

- Advanced eMarketing - personalized content using the user's first and/or last name automatically inserted into every message.

Installation Procedure

To install the Stellar Web Solutions Newsletter Premium there is a three step process:

1. Install the CGI files on your website.
2. Edit the newsletter-include.cgi text file for your site-specific settings.
3. Use the newsletter-install.cgi installation web interface to build the database.

Install Step 1: Installing the CGI Files

Prior to this step, you should have a webserver which can execute Perl CGI code, you should have Perl's CGI and DBI modules installed. Most commercial hosting services provide Perl capability with many common Perl modules such as CGI and DBI already installed.

- A. Place the files newsletter.cgi, newsletter-include.cgi, newsletter-admin.cgi, newsletter-install.cgi files on your webserver where they can be executed, for example /cgi-bin. If you are interested in using the default fields, also place the countries.txt file in the same directory. You may rename these files as required, if you do rename them, remember to record the new names in Step 2. **If you modify the filename of newsletter-include.cgi**, you must edit each of the other CGI files to reflect the change on the "require 'newsletter-include.cgi';" line.
- B. Set execute permissions for newsletter.cgi, newsletter-admin.cgi, and newsletter-install.cgi.

Install Step 2: Configuring newsletter-include.cgi text file.

The newsletter-include.cgi file is a Perl "include" file with the common variables and functions used by the other CGI scripts. You must edit this file to ensure your site-specific settings are recorded **prior** to installing the database table. This file can be edited with any text editor, if you cannot edit files right on your webserver, FTP the file to a PC where you can use Wordpad (or equivalent).

A. SYSTEM VARIABLES

The format of the each variable is "\$variable_name = 'value'; #comment":

- \$sendmail = "/usr/sbin/sendmail -t"; # command to execute sendmail
- \$db_host = 'localhost';# database host, if local enter localhost
- \$db_type = 'mysql';# database type for Perl DBI calls
- \$db_schema = 'mycorp';# database schema
- \$db_user = 'user1';# database username to add, update, remove data, add tables.
- \$db_password = 'pAssWorD1';# database password
- \$db_table = 'stellar_newsletter';# database table name - note dashes are not allowed
- \$admin_email = 'webmaster@domain.com';# administrator's email address
- \$admin_password = 'pAsSWoRd2468'; #for admin login
- \$website = 'www.domain.com';# your website's address

- \$redirect = 'http://www.domain.com/sales.html'; #page to send users to after signing up
- \$company = 'My Corp'; #Your company name
- \$nl_name = 'My Corp Newsletter'; #title
- \$siteemail = 'info@domain.com'; #email address to send messages from
- \$cginame = '/cgi-bin/newsletter.cgi'; #web path to main script
- \$admincginame = '/cgi-bin/newsletter-admin.cgi'; #web path to admin script
- \$installcginame = '/cgi-bin/newsletter-install.cgi'; #web path to install script

B. DATABASE FIELDS (Advanced Configuration)

A Perl array of hashes “@field_def” is used to define what fields make up the table used for newsletter subscription information. You can ask for various types of information – text fields, radio buttons, option selection lists, and checkboxes. Within the newsletter-include.cgi “@field_def” definition there is one line per field, you may comment or uncomment out example fields by adding or removing the # comment indicator at the start of the line.

Adding or removing fields is not supported once you have completed Step 3 – Building the database table. You may need to consult your database administrator if you wish to add fields later (after they are added to the DB you may configure newsletter-include.cgi to reflect the change). You can hide fields later from users by setting show=>'0' at any time.

Database fields are configured with the following options:

- name => ", The name of the variable, no spaces or dashes.
- long_name => ", The name the user will see when entering data.
- type => ", The type of data: **email**->an email address, **system**->non-user field, **short**-> 16 character text entry, **medium**->32 character text entry, **long**->64 character text entry, **radio**->multiple choices in a radio button, **option**->a pick list, **confirmation**-> a single checkbox
- show => '1', Whether or not the user will see this field for data entry. (0 or 1)
- mandatory => '1', Whether or not the field is required to be entered. (0 or 1)
- db_type => 'VARCHAR', Database field type: **VARCHAR**, **INT**, **DATETIME**
- db_size => '128', Database field maximum size (only needed for VARCHAR)
- admin => '0', Whether or not field is shown in the administrator interface.
- file => ", Full path to a file for type=>'option' with one entry per line
- options => ['option1','option2'] Short radio pick list.

Example entries:

- A text field:
{name => 'fname', long_name => 'First Name', type => 'medium', show => '1', mandatory => '1', db_type => 'VARCHAR', db_size => '64', admin => '1', file => ", options => "},
- A radio button:
{name => 'gender', long_name => 'Gender', type => 'radio', show => '1', mandatory => '0', db_type => 'VARCHAR', db_size => '16', admin => '1', file => ", options => ['Male','Female']},
- An option list from a text file:
{name => 'country', long_name => 'Country', type => 'option', show => '1', mandatory => '0', db_type => 'VARCHAR', db_size => '128', admin => '1', file => '/usr/home/stellarwebsolutions.net/cgi-bin/countries.txt', options => "},
- A confirmation checkbox for a legal agreement:
{name => 'legal', long_name => 'By clicking the submit button below I agree to this website's terms of service', type => 'confirmation', show => '1', mandatory => '1', db_type => 'INT', db_size => ", admin => '0', file => ", options => "},

C. HEADER AND FOOTER

- To maintain the look and feel of your website, you may wish to edit the blocks of text in the printHeader and printFooter functions in newsletter-include.cgi. You can go back and edit this part later as well.

Install Step 3: Building the Database Table.

Once you have your table design entered in Step 2, you can use the newsletter-install.cgi web interface to build your MySQL table or be shown SQL code you can use to build the table with another SQL based database. You should already have a database schema and user account in working order. This step will build the table for the newsletter subscription data.

- A. In your web browser go to the location of your newsletter-install.cgi script.
- B. You will be prompted for an email address and password, these values were set in Step2 (\$admin_email and \$admin_password).
- C. You should see the database status is online. Otherwise, check your settings in Step 2 and that your database is really online:

Database Status

Your database mysql stellar on localhost is **online**.

- D. The table status should be not installed (check that you aren't using an existing table, if you want to delete an existing table and all it's content enter "drop table tablename" in your SQL client software.

Table Status

Your table stellar_newsletter2 is **not installed** yet.

- E. Review the SQL code under the **Database Table Build** section. If you are using MySQL, you can click the Execute button to install the table. Otherwise copy the SQL code and modify it as necessary to install the table into your database.
- F. The top line should now read “**Installation was successful**” otherwise review the error message and take corrective action or contact technical support.
- G. The Table Status will reflect that your new table is online with no rows:
Table Status
Your table stellar_newsletter2 is **online** with **0E0** rows entered.
- H. The **Table Field Consistency** section should reflect that the script’s variables and the database fields are consistent.
- I. See the Administration section for more information on importing data from flat files. As the table created is just a regular table, you may manipulate it at will. Refer to Appendix A for details on the system fields of the table.
- J. You can now verify that the user script newsletter.cgi is in working order and able to subscribe users etc or conduct administrative functions.

This completes the installation procedure. We recommend you backup the newsletter-include.cgi settings file and make frequent database backups, tools such as mysqldump can be used to automate this procedure as well as the Administrator tools built in to the newsletter system allow you to download CSV data.

User / Subscriber View

The newsletter.cgi page contains all the functionality available to end users of the newsletter system. Users can subscribe, confirm registration, and unsubscribe. Confirmation and unsubscription requests are executed through one click links sent by email.

Subscription Methods

Standalone

You may direct users directly to the newsletter.cgi page, a form built with all the fields set to show from Installation Step 2.B. The page will prompt for a valid looking email address and any mandatory fields.

Embedded

You may also include a full form copied from the HTML source of the newsletter.cgi page and pass it along to the newsletter.cgi script for validation.

Alternatively, you may create a basic email address only form that POSTs to newsletter.cgi the email address in a field named "add"; sample:

```
<FORM name="stellar" METHOD="POST" ACTION="/cgi-  
bin/newsletter.cgi" ENCTYPE="application/x-www-form-  
urlencoded">  
<input type="text" value="" size=32 maxlength=128  
name="add">  
<INPUT TYPE="submit" NAME="submit" VALUE="Subscribe">  
</FORM>
```

Users will then be prompted for additional fields from newsletter.cgi (if you are only asking for an email addresses and no additional fields, then it's recommended that you use the HTML form generated on newsletter.cgi to include throughout your site).

Users already registered and either not verified or verified cannot subscribe a second time. Users who have unsubscribed can resubscribe but will have to re-confirm their email address. Email addresses with status of 3 cannot resubscribe or receive emailed newsletters.

Users cannot make changes to their account details, they can unsubscribe and resubscribe to make changes.

Subscription Confirmation

Upon subscribing, users will be immediately emailed a confirmation email with a one-click link back to the newsletter.cgi page passing the values: email= email address and confirm=the registration 64 digit code randomly created during registration. Users may also copy and past the URL into their browser to confirm their registration. Users cannot receive the newsletter emails without confirming their registration – this allows the system to ensure valid email addresses.

If a user attempts to resubscribe a second time and has not confirmed their registration, the confirmation email will be resent.

Subscription Removal

Users may view a form to request an unsubscribe link via email by viewing newsletter.cgi?showRemoval=1.

To get a removal email sent to a specific user, call newsletter.cgi and pass parameters email=email address and delete=1.

The emailed removal link consists of a link to newsletter.cgi?email=email address&remove=the 64 digit registration code.

Subscriptions that are removed will have their status field set to “2”, you may wish to occasionally remove inactive accounts through your command line database interface.

Administrator Views

The newsletter-admin.cgi page contains the administrative tools to manage user settings, send newsletter emails to all verified users, and download data in CSV format from the database. Access to this page is protected and uses the credentials set in Installation Step 2.B. (\$admin_email and \$admin_password).

Account Listing and Changes to Account Status

The default view is a table containing a report of all subscriptions showing the fields setup in Installation Step 2.B with admin=>'1' (you can add or remove this “admin” report view status at any time).. For any email address you can click on the links to change a user’s status “unverified”, “verified”, “unsubscribed”, and “suspended”.

Composing Newsletter Messages

Click on the link “Compose a Newsletter” (newsletter-admin.cgi?compose=1) to begin creating a message to send to all verified users.

Enter the “From” address, Subject, and Body of the message. To send an HTML message enter your HTML after the <HTML> tag in the text box. A removal instruction and link will be appended to the bottom of the message. You can also set the “Content-type: text/plain” and strip out the <HTML> tag to send a text only message. You can also use your own mailer as required, see the next items regarding downloading data from the database.

Personalized Content

You can include the email address (email), first name (fname), or last name (lname) by including #EMAIL#, #FNAME#, or #LNAME# respectively in the subject line or body of a newsletter message. Contact Stellar Web Solutions www.stellarwebsolutions.net for additional personalization requirements.

Downloading CSV Data from the Database

Click on “Download CSV Report” (newsletter-admin.cgi?downloadDB=1) to download a comma separated value (CSV) report of the fields setup in Installation Step 2.B with admin=>'1'.

Click on “Dump DB to CSV” (newsletter-admin.cgi?dumpDB=1) to download the entire database including the system fields to a comma separated value (CSV) file.

Adding Data to the Database from Flat CSV or TSV Files

The newsletter system allows you to use the newsletter-install.cgi script to import comma separated value and tab separated value data from flat files over the web interface. This can allow you to upgrade from other database systems or manual email lists to the Stellar Newsletter Premium system. Registration codes can be automatically generated for each user added to allow for one-click removal.

You can upload data from flat files – comma separated value (CSV) or tab separated values (TSV) by clicking on the “Install Status/Import Data” link (newsletter-install.cgi) and click on “You may import data from a flat file if needed” under “Table Status” (newsletter-install.cgi?showImport=1).

Select the data separator – comma or tab, and browse to the text file to upload. Click “Import File” to import the data into the database. If the status variable is not provided it will be set to level 1 – verified. If a registration code (regcode) is not provided, one will be randomly generated for each subscription (and included in messages sent from the newsletter emailer).

Appendix A: System Database Table Fields

The Newsletter system requires certain fields be installed to operate, you may find the information in some of these fields to be useful.

- status: This variable records the status of the user's subscription. You may wish to occasionally remove unsubscribed users depending on your privacy policy.
 - 0 unverified (new users who have not confirmed their registration)
 - 1 verified (subscribed users with verified email addresses)
 - 2 unsubscribed (users who have opted out of further messages)
 - 3 suspended (users can be assigned this setting by the administrator to block a user from receiving messages or signing up again)
- email: User's email address
- id: Unique ID associated to every account.
- timestampadd: A time stamp for account registration.
- ipadd: IP address recorded during registration.
- timestampconfirm: A time stamp for account confirmation.
- ipconfirm: IP address recorded during account confirmation.
- timestampremove: A time stamp for account removal/unsubscribe.
- ipremove: IP address recorded during account removal/unsubscribe.
- regcode: A 64 digit/letter random code required for user confirmation or removal.