



Mailing List Module Administrator's Guide

Installation and configuration guide for administrators and developers

Table of Contents

Chapter 1	Installation Guide	3
1.1	Prerequisites	4
1.2	Installing Sitecore package	5
1.3	Configuring the Module	6
1.3.1	Firewall Settings	8
1.3.2	License	8
1.3.3	Test Configuration	8
Chapter 2	Mailing List Module User Manual	9
2.1	Creating a Mailing List	10
2.2	Editing the Mailing List	11
2.3	Deleting a Mailing List	12
Chapter 3	Managing Subscribers	13
3.1	Creating a subscriber	14
3.2	Finding a subscriber	16
3.3	Editing a subscriber	17
3.4	Deleting a subscriber	18
3.5	Viewing the audit log	19
3.6	Viewing the mail log	20
Chapter 4	Managing the Outbox	21
4.1	Create a new mail	22
4.2	Editing mail	25
4.3	Deleting mail	26
4.4	Sending mail	27
Chapter 5	Managing Sent Mails	31
Chapter 6	Managing Attachments	32
Chapter 7	Changing the layout of URL-type Emails	34
Chapter 8	Module Localization	36
8.1	Localizing Field Names	37
8.2	Localizing MailingList Titles	38
Chapter 9	Sending Mails in Background	40
Chapter 10	Executive Summary	41
10.1	Executive Summary Columns	42
10.2	Monitoring URL Clicks	43
10.3	Monitoring Opened Emails	44
10.4	Deleting mail from database	45

Chapter 1

Installation Guide

This chapter covers the installation and configuration procedure of the module.

1.1 Prerequisites

The module requires MDAC 2.6 or later installed on the server (<http://msdn2.microsoft.com/en-gb/data/aa937730.aspx>).

1.2 Installing Sitecore package

The Mailing List module is distributed as a usual Sitecore CMS package. You can install it using the Installation Wizard available via the Sitecore desktop link *Sitecore » Development Tools » Installation Wizard*.

The package installs the `/App_config/Include/MailingList.config` file which contains the settings necessary to start the module.

1.3 Configuring the Module

You should perform a full publish after the installation of the module.

Restart the Sitecore CMS client (if it wasn't restarted after installing the package) and go to the 'Settings' page in the *Sitecore » All Applications » Mailing List Module*.

If anonymous access to the site is disabled, set the basic authentication.

The following settings are used:

Key	Sample value	Description
SMTPServer	mail.sitecore.net	Specifies the SMTP server you use to send mails.
SMTPAuthMethod	NONE	Type of authentication to use with SMTP server.
SMTPLoginDomain		Domain name to pass to SMTP server when performing authentication.
SMTPUserName		User name to use for authentication with SMTP server.
SMTPPassword		Password to use for authentication with SMTP server.
Database	/data/maillist.mdb	Location of the database.
ConnectionString		Specifies a database connection string for the database. This setting overwrites the MailingListDatabase setting.
Mail Senders	HTML Mail or Text Mail or Url Mail	<p>A node that contain a number of items representing mail types. Each of them has two fields in the data section which specify the template name and mail sender interface. When a mail is sent, the mail sender is found using the template name of the mail and this list. Using this you may implement your own object for sending mails:</p> <pre>MailingList.Html mail = Sitecore.Modules.MailingList.HtmlMailSender();</pre>
IndividualMails	true	<p>Specifies if mails should be sent individually or as bulk (using BCC). This setting may be one of three options: True, False, <blank></p> <p>If the setting is blank, the user chooses how mails are sent.</p>
ReplaceCustomFields	true	<p>Specifies if expansion macros uses values from custom fields (subscriber fields). For instance you may have a custom field named Address. If the setting is true, mails are sent individually and the mail contains the string \$Address\$, this string is replaced with the value of the custom field.</p> <p>This option degrades performance.</p>
Encoding	utf-8	Specifies the Encoding of the mail body and header fields.

Key	Sample value	Description
RecipientUrlMails	false	Indicates if URL mails should request the source web page per subscriber. If true the web page is requested per subscriber with SubscriberID and Email passed on the QueryString. If false the web page is only request once.
SubscriberFieldLen	255	Length used by CutString before inserting into subscriberfields. It should be used only if you use MSSQL database.
Publishing Target	Internet	Target to publish letter to
PublishDomain	www.mysite.com	Determines on which domain to look for the published mail. NOTE: this setting must contain a valid value
InternalPublishWait	20	Determine how many seconds to wait for mail to be published before raising error.
ExternalPublishWait	10	If the mail-page is not available on the frontendserver it loops until the page is ready. If it is not ready within the time specified in MailingListExternalPublishWait , the loop times out and an error is returned.
User		User to login, if anonymous access disabled.
Password		Password to login, if anonymous access disabled.
SendMethod	sync or async	Specifies whether letters will be sent out in foreground (sync) or as a background job (async), without blocking the Sitecore client operation. Async send method is useful for large mailing lists.
BatchSize	250	Number of recipients of each envelope sent in batch mode. When sending a letter to a list of 1000 subscribers, actually 4 envelopes will be sent to each of 250 recipients. This setting allows to send mail through SMTP servers which limit the number of recipients per letter.
BatchSleep	300	Number of milliseconds to sleep between requests to SMTP server when in batch mode. Use this setting to decrease load of SMTP server.
IndividualSleep	100	Number of milliseconds to sleep between requests to SMTP server when in individual mail mode. Use this setting to decrease load of SMTP server.
QueueSleep	0	Number of milliseconds to sleep between database requests when putting mails into queue.
HandlerAssembly	/bin/mailhandler.dll	This setting specifies a class that may be used for filtering recipients and customizing the mail. The named class must implement the IMailHandler interface.

Key	Sample value	Description
HandlerClass	Customer.MailHandler	This setting specifies a class that may be used for filtering recipients and customizing the mail. The named class must implement the IMailHandler interface.
Debug	yes or no (checkbox)	Enables verbose tracing of mailinglist operations in Sitecore log files.
NoSend	yes or no (checkbox)	Whether actual access to SMTP server will be suppressed
DatabaseRetries	1	Number of times database operation may fail before sending thread is aborted.
DatabaseRetrySleep	1	Delay between DatabaseRetries (ms)
CheckEmail	yes or no (checkbox)	Whether recipient emails are checked for validity

1.3.1 Firewall Settings

The following ports must be opened:

SMTP - port number - 25

HTTP - port number - 80

1.3.2 License

The module requires a valid license. The license key is "Sitecore.MailingList".

1.3.3 Test Configuration

The MailingList Module is now installed in Sitecore. You can test the configuration by using the Mailing List Tasks page in Sitecore. In the Sitecore client choose Sitecore » All Applications » MailingList Module » Mailing List Tasks Page menu. You'll see the list of the available actions.

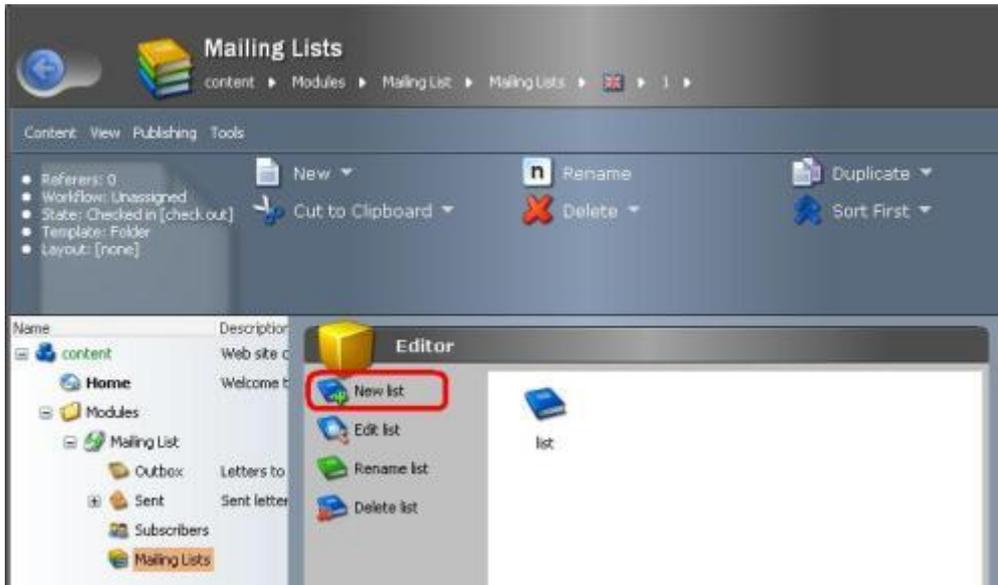
Create yourself as a test user and subscribe to one or more of the test lists. Send a test email.

Chapter 2

Mailing List Module User Manual

2.1 Creating a Mailing List

To create a mailing list start *Mailing List Tasks Page* and select the “Mailing lists” node in the Sitecore content tree, then click on the “New list” link:



Enter the name of the new Mailing List (for example “Newsletter”), fill Description field and click OK. You’ll see the new list in the editor pane.

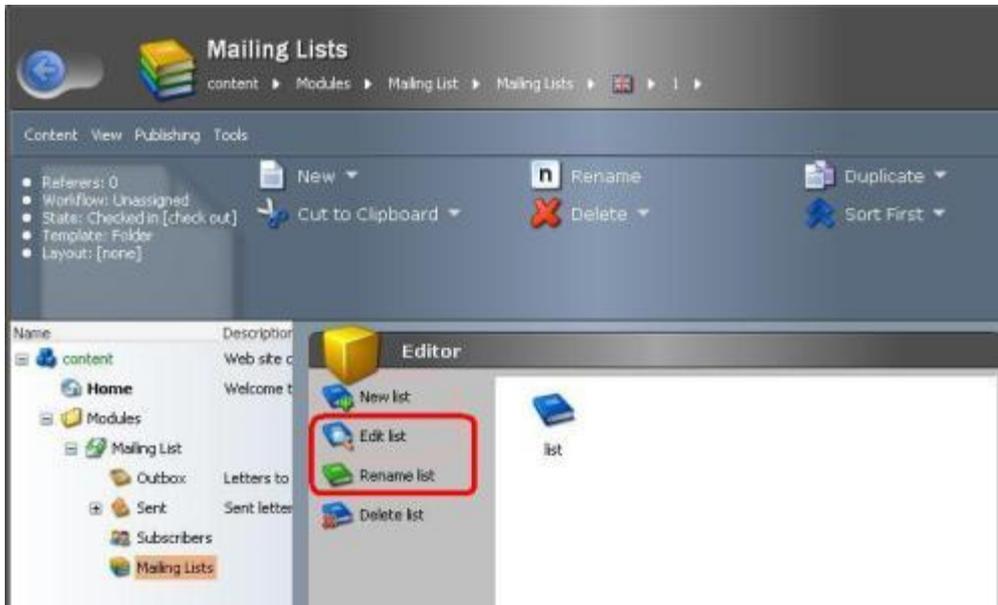
You can change view for Editor pane. Right-click on it and choose Views in the context menu.



2.2 Editing the Mailing List

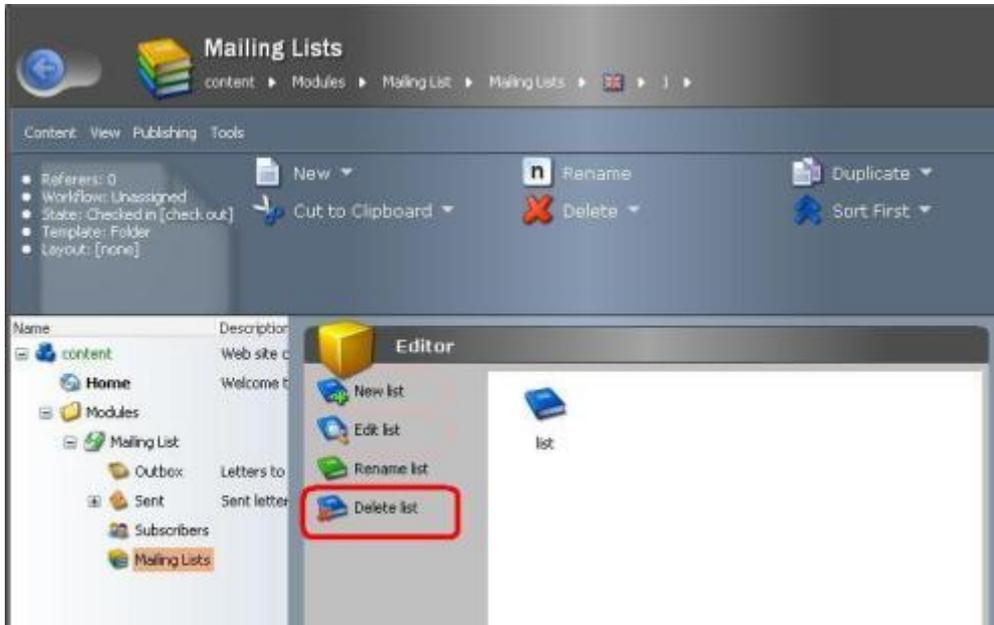
In order to edit the mailing list (for example to set the value of “Description” field) you have to start *Mailing List Tasks Page* and select the “Mailing lists” node in the Sitecore content tree, then select a list and click *Edit list* link or select *Edit* from context menu. Properties window will be opened. After making changes you should press *Save* button.

Also it's possible to rename existing mailing list. For this purpose you should select a mailing list in the way described above and choose *Rename list* on the Editor pane.



2.3 Deleting a Mailing List

In order to delete the mailing list you have to start *Mailing List Tasks Page* and select the “Mailing lists” node in the Sitecore content tree, then select a list and click *Delete list* link. Then confirm deleting or cancel it using Cancel button in the messagebox.



Chapter 3

Managing Subscribers

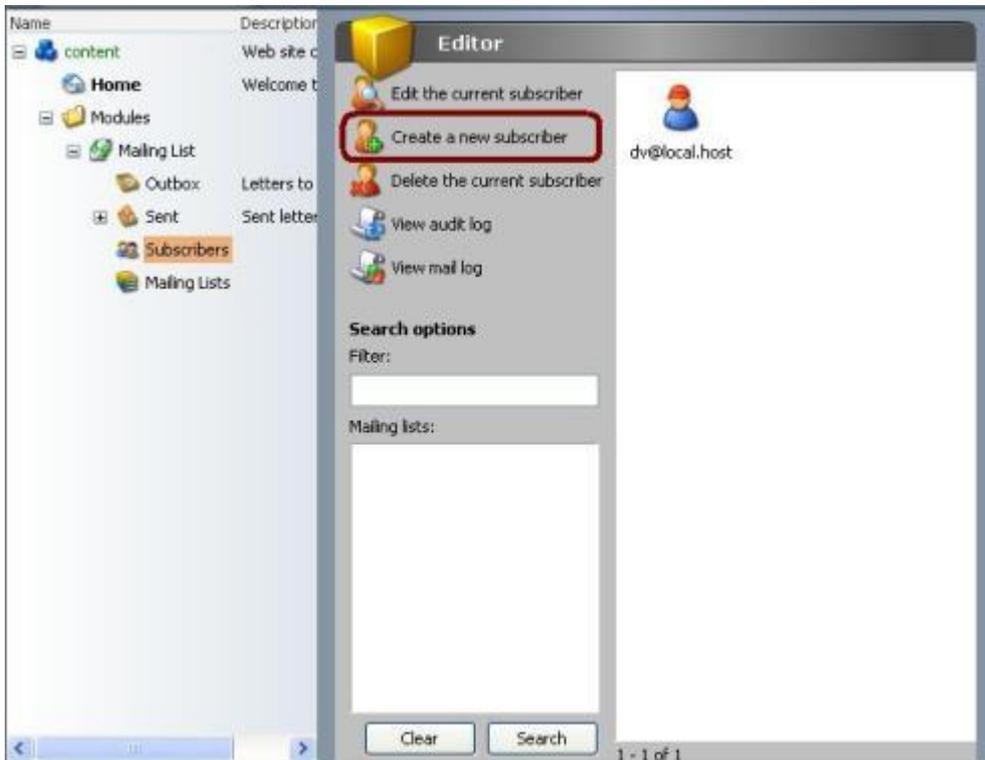
Subscribers' management can be organized in two ways:

1. The MailingList Module can be extended with custom ASPX pages on the site's front end, which allows the subscribers to enter and edit their personal information and to subscribe to or unsubscribe from mailing lists.
2. Subscribers and subscriptions can be managed with the "Subscribers" page that comes with the Mailing List module.

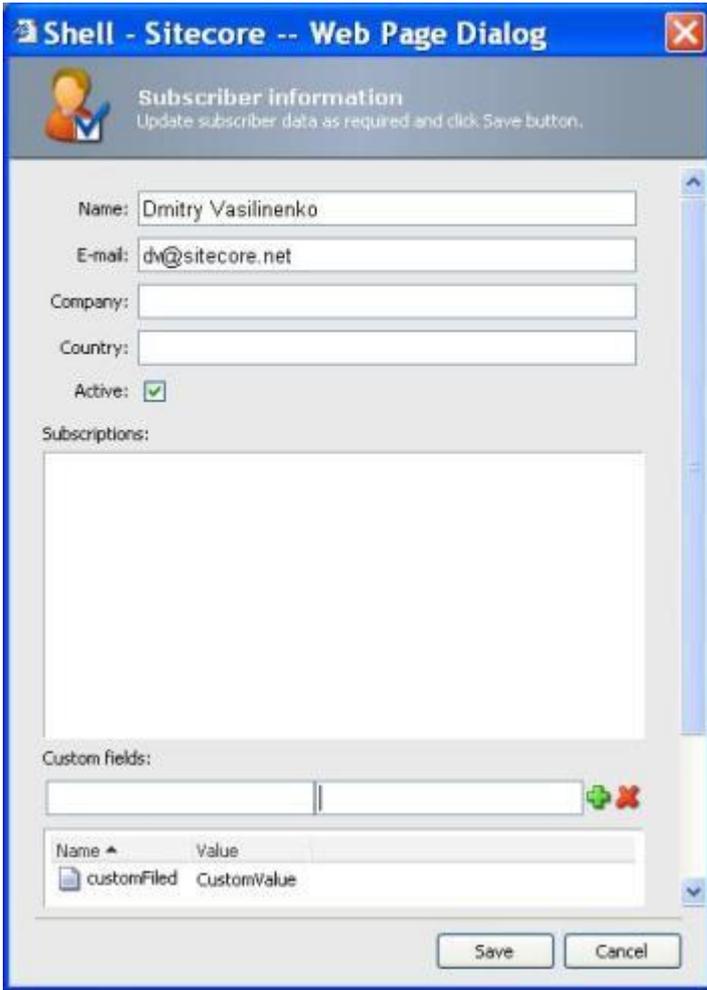
In this manual we are going to consider the second approach.

3.1 Creating a subscriber

To create a new subscriber start *Mailing List Tasks Page* and select the “Subscribers” node in the Sitecore content tree, then click *Create a new subscriber* link.



The “Subscriber Information” window opens up.



Using the “Subscriber Information” dialog you can enter personal information concerning the subscriber and subscribe/unsubscribe him/her to the mailing lists.

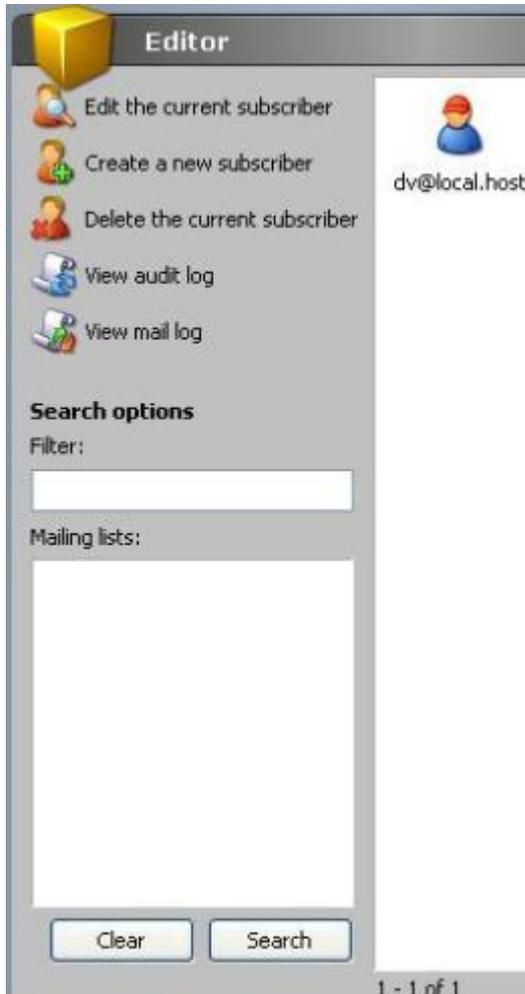
Fields:

- Name – subscriber’s name (required);
- Email – subscriber’s email (required);
- Company – subscriber’s company;
- Country – subscriber’s country;
- Active – check box indicating whether the subscriber is currently active. This check box can be used to temporarily disable the subscriber without deleting his/her information from mailing list database
- Subscriptions – list of subscriptions. To register the subscriber to a mailing list set marks in the appropriate check boxes in the “Subscriptions” field.
- Subscriber fields – allow you to add custom fields to the subscriber record. To add a new field click on the “Plus” button enter the name and the value of the field. To delete a custom field click on the “Delete” button.
In the screen shot above the custom field “customField” has been added with the value “CustomValue”.

To save changes click on the “Save” button.

3.2 Finding a subscriber

In real-world sites, subscriber lists usually contain thousands of subscribers. It might be difficult to quickly locate a particular subscriber in such a long list. The Sitecore Mailing List Module facilitates this task by providing “Search Options” pane in the Editor section for “Subscribers” node.



To filter subscribers you can select the mailing list in the “Mailing lists” field (by marking the check box) or fill “Filter” field. To perform Search options click on the “Search” button.

The “Filter” text box allows filtering subscribers by the values of the subscribers’ fields. If you enter some string into the “Filter” text box and click on the “Search” button, the subscribers list will be updated to display only those subscriber records that have the filter string in any given field (name, email, company, country or any custom field).

Examples of filter usage:

- To find all subscribers that come from Denmark, enter “Denmark” into the “Filter” text box and click on the “Search” button.
- To find a subscriber with a particular email, enter the email into the “Filter” text box and click on the “Search” button.
- To find a subscriber by name, enter the name into the “Filter” text box and click on the “Search” button

Note: Clear button in Search filter clears just input fields. To remove filter one should press Search button with empty search parameters.

3.3 Editing a subscriber

In order to edit the subscriber's information you have to start *Mailing List Tasks Page* and select the "suscribers" node in the Sitecore content tree, then select a subscriber and click *Edit the current subscriber* link or select *Edit* from context menu. "Subscriber information" window will be opened. After making changes you should press *Save* button.



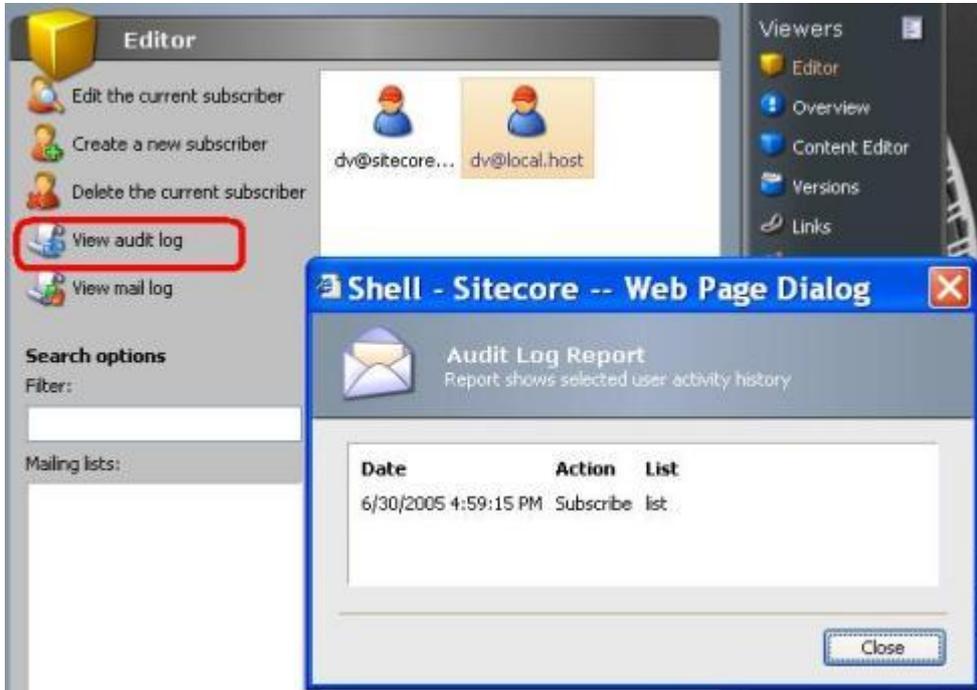
3.4 Deleting a subscriber

In order to delete the subscriber you have to start *Mailing List Tasks Page* and select the “suscribers” node in the Sitecore content tree, then select a subscriber and click *Delete the current subscriber* link or select *Delete* from context menu. Then confirm deleting or cancel it using Cancel button in the messagebox.



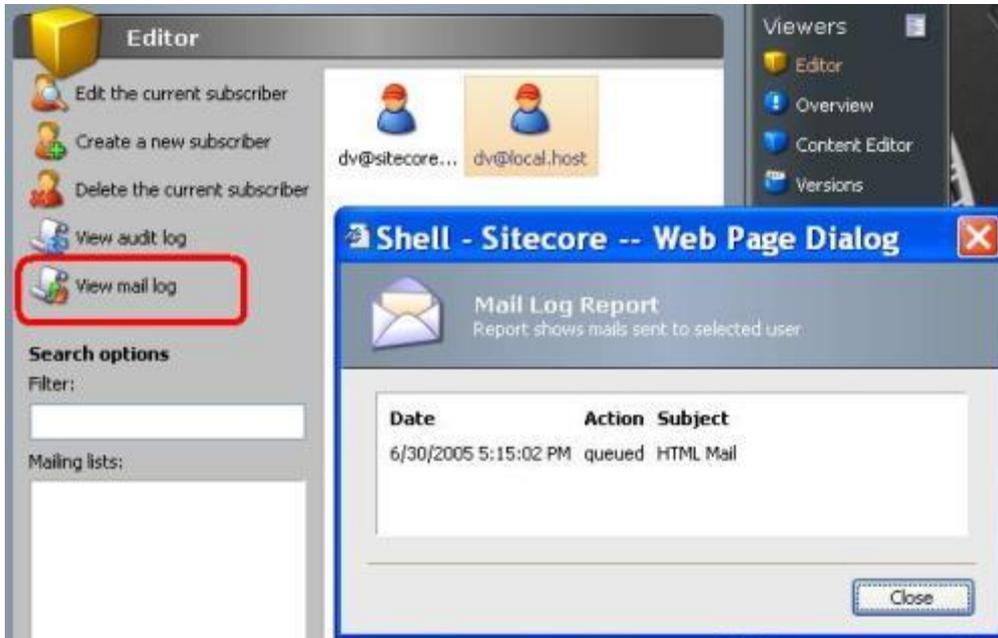
3.5 Viewing the audit log

The subscriber's audit log shows events that changed the state of the subscriber (such as when the subscriber registered to or unregistered from a mailing list). To view the audit log start *Mailing List Tasks Page* and select the "suscribers" node in the Sitecore content tree, then select a subscriber and click *View audit log* on the *Editor* pane.



3.6 Viewing the mail log

The mail log shows mail statistics for the subscriber (what letters were sent to the subscriber and when). To view the subscriber's mail log start *Mailing List Tasks Page* and select the "suscribers" node in the Sitecore content tree, then select a subscriber and click *View mail log* on the *Editor* pane.



Chapter 4

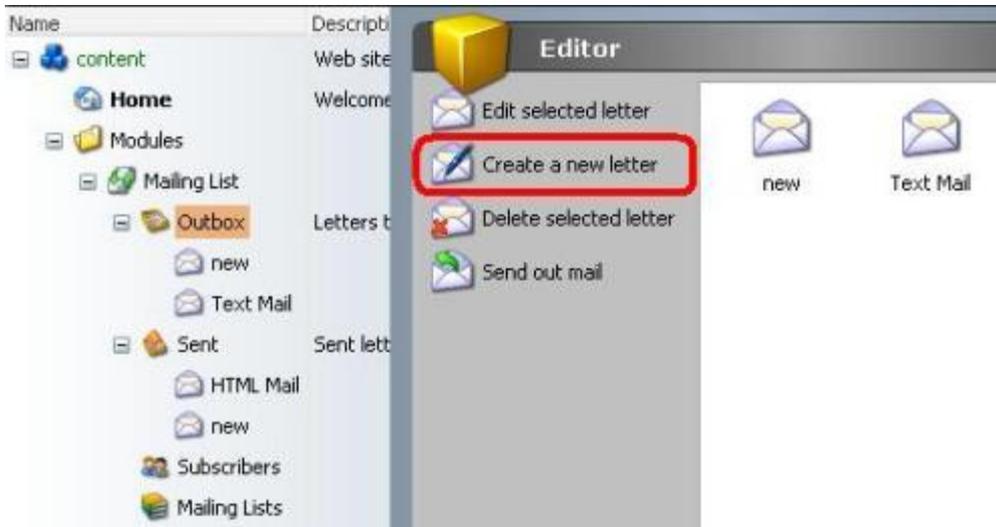
Managing the Outbox

Outbox node allows you to create and send out mails.

4.1 Create a new mail

To create a new mail the following steps should be executed:

1. Start *Mailing List Tasks Page* and select the "Outbox" node in the Sitecore content tree, then click *Create a new letter* link.



2. The "Create a new mail" dialog box will be displayed, offering you to select the mail type.



Sitecore supports three mail types:

- HTML mail
 - Plain text mail
 - URL mail
3. Select the mail type and click on the "Create" button.
 4. Enter the name of the new mail and click OK.
 5. The mail will be created and appears in the Editor pane.

Mail types:

HTML Mail

Emails in HTML format. Mail items of the "HTML mail" type have three fields in "Data" section:

- Subject - the subject of the message

- Message - the HTML body of the message. This field can be edited with Sitecore HTML editor, just like any other field of the "html" type. To activate the editor click on the Zoom button.
- Alternate text - the plain text body of the message. This field will be used if the recipient's mail client does not support HTML mails

Plain text mail

Email in plain text format. Mail items of this type have two fields on the "Data" section:

- Subject - the subject of the message
- Message - the body of the message

Note: The Message field is mandatory to fill.

URL mail

The URL mail works by extracting a copy of a web page based on a URL - i.e. it extracts the HTML from the URL, and *embeds* the images on that web page in the mail. The resulting HTML is sent to the recipients.

Important note:

All relative links on the page that is sent as URL mail will be converted to fully qualified links. For example, if you have following links on the front page of your Web Site:

```
<a href="/sitecore/admin/dump.aspx">Dump</a>  
<a href="#bookmark">Bookmark</a>
```

and you send the front page as URL mail, the links will be converted to:

```
<a href="http://<domain>/sitecore/admin/dump.aspx">Dump</a>  
<a href="http://<domain>/<current page link>#bookmark">Bookmark</a>
```

Mail items of this type have three fields in the "Data" section:

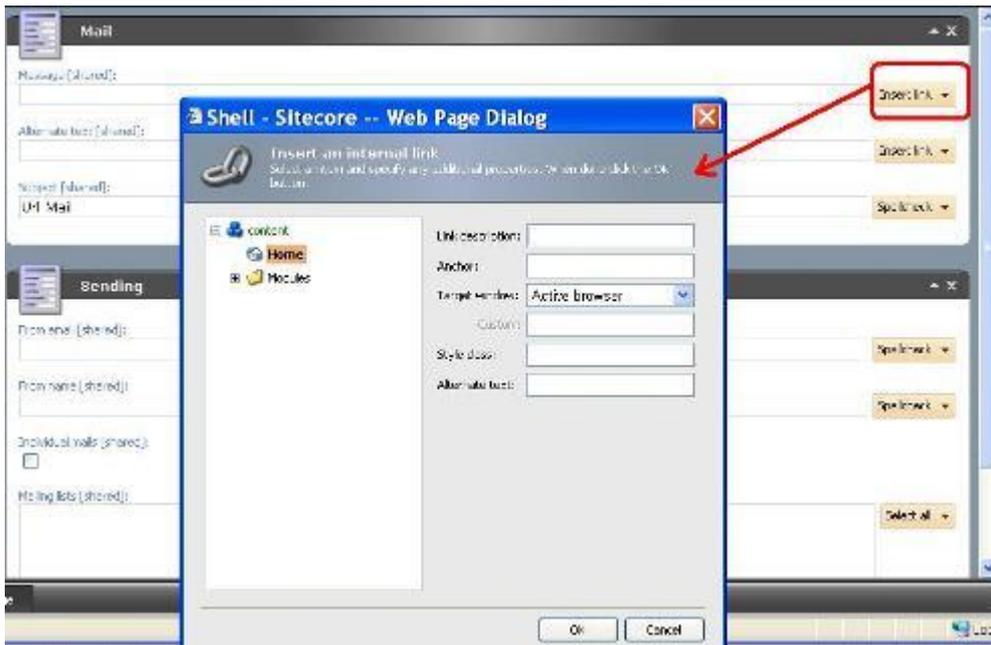
- Subject - the subject of the message
- Message - the URL of the web page that should be sent in the body of the mail.
- Alternate text - the URL of plain text version of the same page. This version of the mail will be used if the recipient's mail client does not support HTML mails.

Mail items of this type have the following three fields in the "Data" section:

- Subject - the subject of the message
- URL - the URL of the web page that should be sent in the body of the mail.
- Alternate URL - the URL of plain text version of the same page. This version of the mail will be used if the recipient's mail client does not support HTML mails.

Note: the URL field is mandatory to fill.

To specify the URL click on the button *Insert link at* the field Message and choose source page:

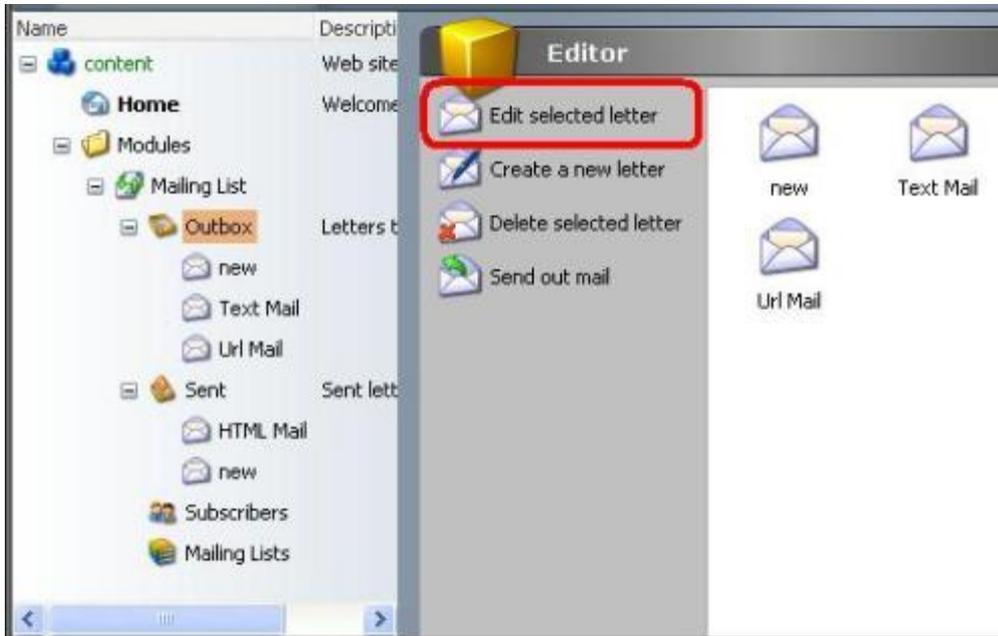


Mail items of all three types have five additional fields in the "Sending" section:

- From Email - the sender's email address
- From name - the sender's name
- Individual mails - the check box indicating whether the mail should be generated for each recipient. This option is usually used when mail body contains expansion macros, e.g. \$name\$
- Mailing lists – list of Mailing Lists which mail will be sent to.
- Additional recipients - the semicolon-separated list of email addresses of additional recipients.

4.2 Editing mail

To edit a new mail start *Mailing List Tasks Page* and select the “Outbox” node in the Sitecore content tree, then select a letter and click *Edit selected letter* link or select “Sent” node in the Sitecore content tree and click *Open* link.



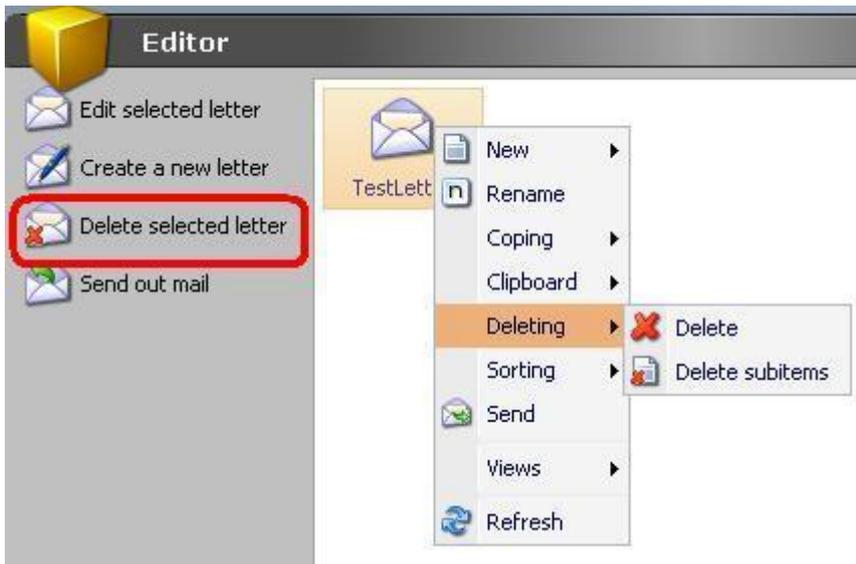
You can also open the letter by double clicking on it in the Editor pane or just select a mail item in the Content Tree.

Once you are done editing, save the changes by clicking on the “Save” button in the Sitecore toolbar.

4.3 Deleting mail

If a mail item becomes obsolete, it can be deleted from the outbox. This can be done in several ways:

1. Start *Mailing List Tasks Page* and select the “Outbox” node in the Sitecore content tree, then select a letter and click *Delete selected letter* link. Confirm or cancel deleting in the dialog window.
2. Start *Mailing List Tasks Page* and select the “Outbox” node in the Sitecore content tree, then switch to Editor pane, select a letter and choose *Delete* from context menu. Confirm or cancel deleting in the dialog window.
3. Select a mail item in the Content Tree and delete it as usual item.

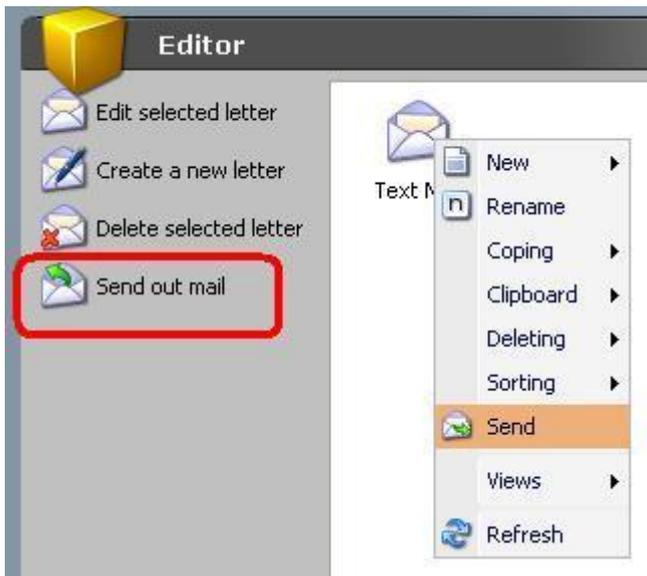


4.4 Sending mail

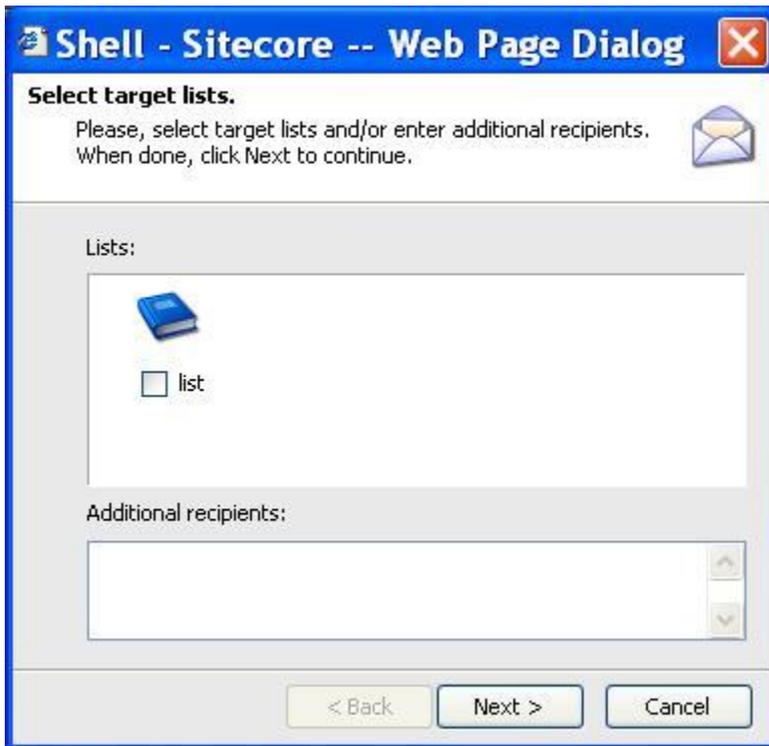
A mail can be sent in several ways:

1. Start *Mailing List Tasks Page* and select a letter under the "Outbox" node in the Sitecore content tree and click *Send* button on the toolbar.
2. Start *Mailing List Tasks Page* and select the "Outbox" node in the Sitecore content tree, then switch to Editor pane, select a letter and choose *Send* from context menu.
3. Start *Mailing List Tasks Page* and select the "Outbox" node in the Sitecore content tree, then choose *Send out mail* on the Editor pane.
4. Start *Mailing List Tasks Page* and select the "Sent" node in the Sitecore content tree, then choose *Send queued mail* link on the Editor pane.

The first three of these four approaches start the Send Mail wizard.

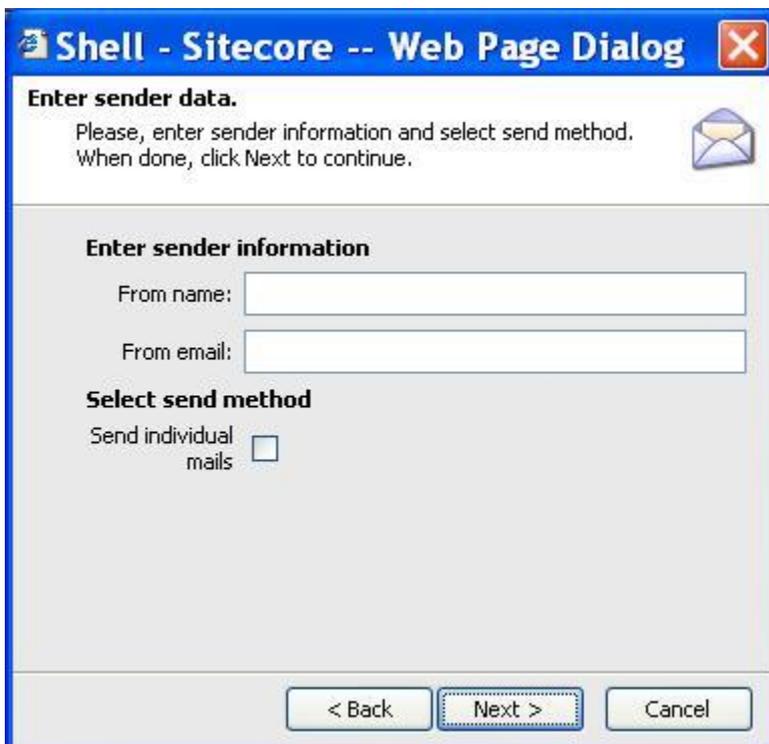


1. The first screen of the wizard is the "Welcome" screen.
2. The second screen allows you to select the mailing lists that the mail should be sent to and to specify additional recipients.



The fields have the same meaning and default values as corresponding fields on the “Sending” section of the mail item.

3. The next screen of the “Send Mail” wizard allows you to specify the sender’s e-mail, “From email”, the sender’s name “From name” and whether individual mail should be generated for each recipient.



The fields have the same meaning and default values as corresponding fields on the “Sending” section of the mail item.

4. The next screen of the “Send Mail” wizard displays summary information for the mail and offers you to send a test mail. Also you can see your email in preview mode.



Note: There might be a lag in publishing the item, so its not immediately available on website. Therefore it is recommended:

- *Please have a look at the mail in preview mode.* In this case you make sure that publishing successfully is done and check your changes in the html or text mail. If mail hasn't published yet, you can wait here and refresh browser until it is ready. Then you go on as usually. Remember for URL mails you should publish by your hand before sending mails.
- *Afterwards you should send a test mail* to test if the SMTP server is up and running, and to see what the mail will look like in the mail client (this is especially important for HTML mails).

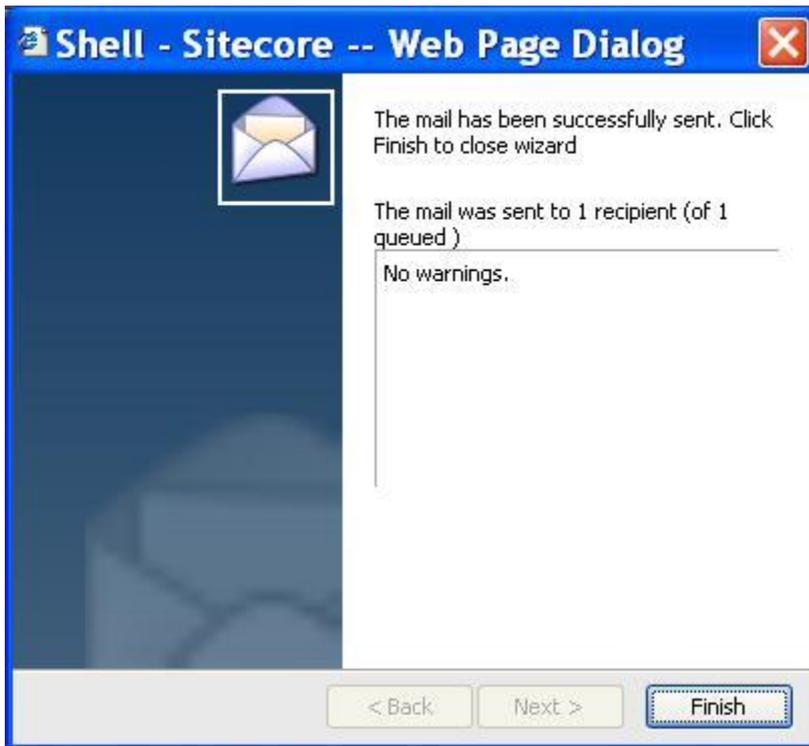
To proceed with sending the mail, click on the "Next" button in the wizard.

5. Sitecore will queue the mail item and display the Ready to send window:

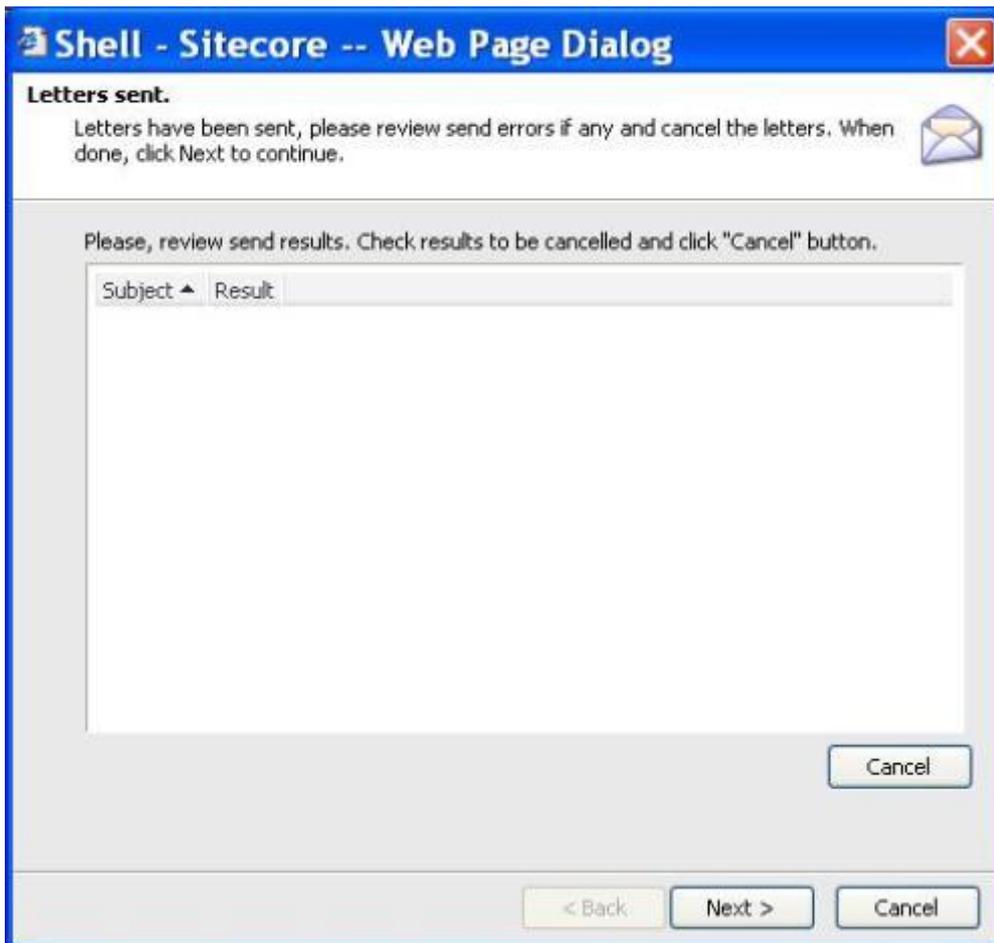


Clicking on the "Next" button in this screen will actually transmit the message to the recipients.

6. Sitecore will display a summary screen confirming that the message has been sent to a particular number of recipients and will display errors and warnings (if any).



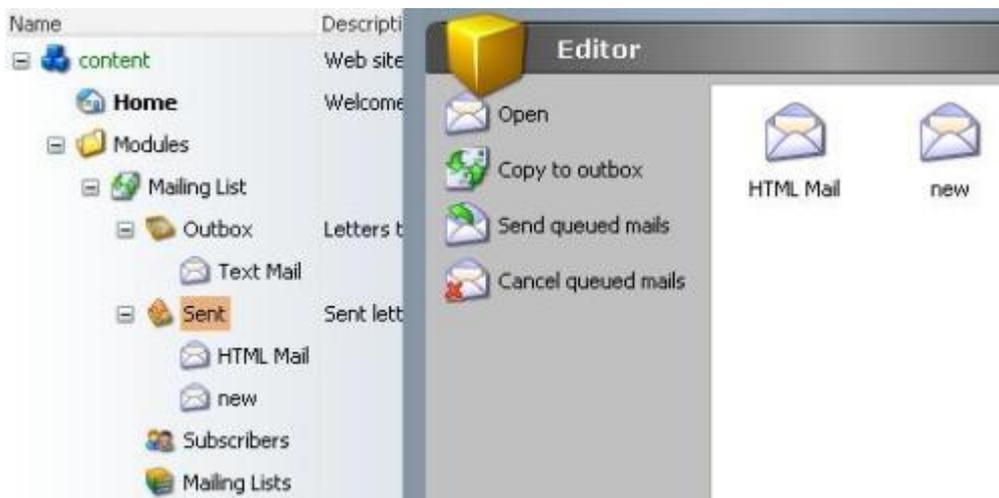
7. Send queued mail link starts the other wizard. It allows you to choose queued mail for sending.



Chapter 5

Managing Sent Mails

The “Sent” box offers you four commands in the “Editor” pane as it is shown on the screen dump below:



- Open mail – opens the selected mail for viewing/editing
- Copy to outbox – copies the selected mail to the outbox
- Send queued mails – runs the “Send Queued Mails” wizard.
- Cancel queued mails - runs the "Cancel Queued Mails" wizard.

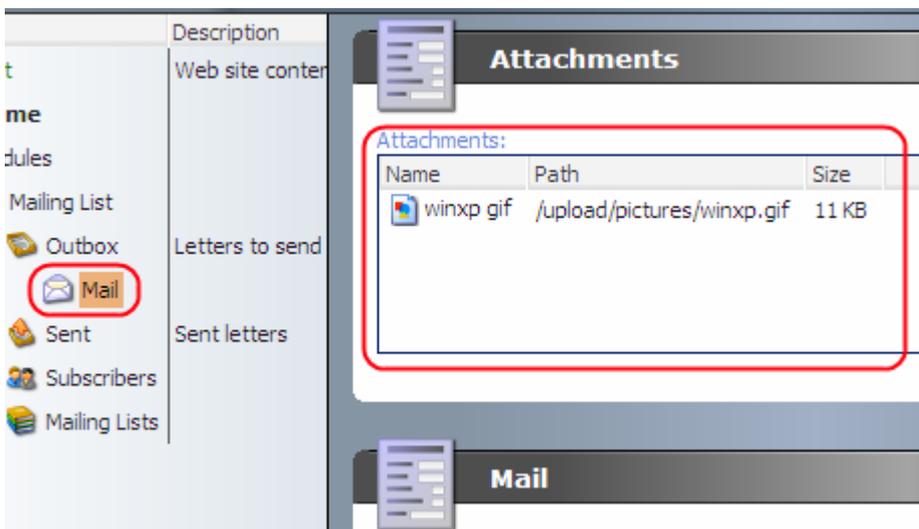
Cancel queued mails wizard allows you to empty queue mails that have not been transmitted to the recipients yet.

The *Send queued mails* wizard allows you to send out mails that have been queued, but have not been transmitted to the recipients. You might have queued mails if your SMTP server have failed to deliver the mail to some of the recipients. If you have clicked “Cancel” in the “Queued” screen of the “Send Mail” wizard all queued mails of this mail are marked as unsent.

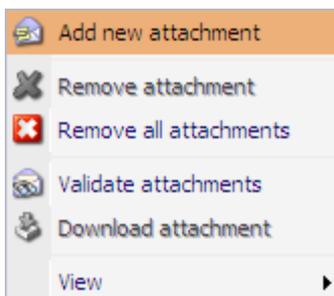
Chapter 6

Managing Attachments

Attachments are managed in the Attachments field of the mail's Attachments section.



Right-click on this field and the context menu will appear.



Below is the description of the actions this menu provides.

Add new attachment

Select this option to add new attachments, The Media Library will open. Select a media item you want to attach to the letter.

Remove attachment

Select this option to remove an attachment.

Remove all attachments

Select this option to remove all attachments.

Validate attachments (for Sitecore 5.1.1/5.2 only)

Select this option to validate attachments. Sitecore checks if all the attached files exist and shows the appropriate message.

Download attachment

Select this option to download an attachment and save it locally. The download dialog box will appear.

View

Select this option to choose the view style (Icons, List or Details)

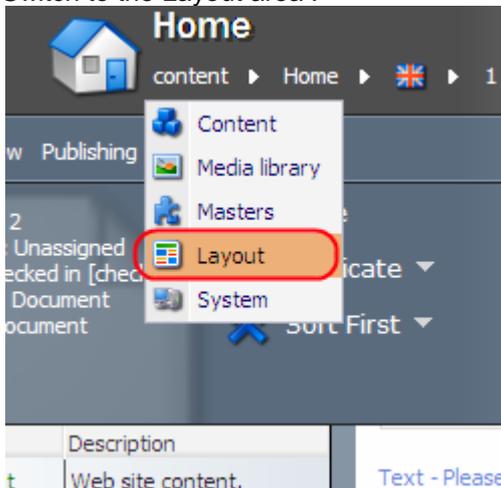
Chapter 7

Changing the layout of URL-type Emails

The layout of URL mails is changed by filling the message field with an appropriate link having a parameter. Below is the detailed description of this operation.

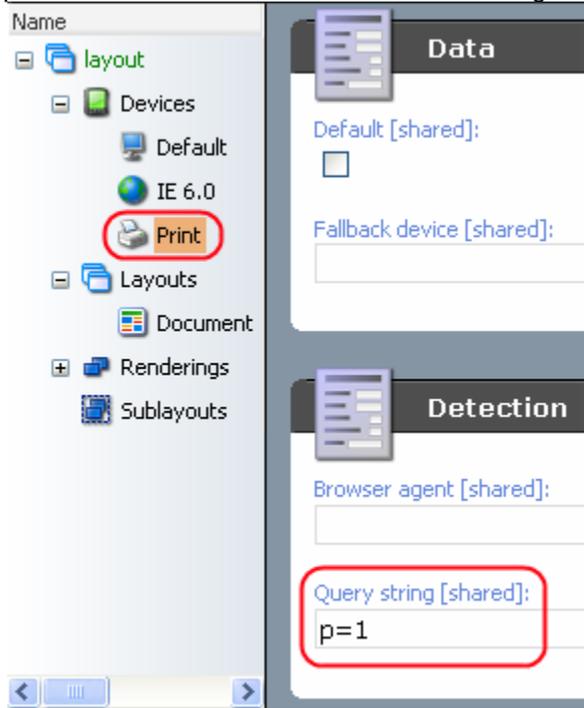
Refer to the [Create a New Mail](#) section to read more about available email types.

1. Open the Content Editor,
2. Switch to the Layout area :

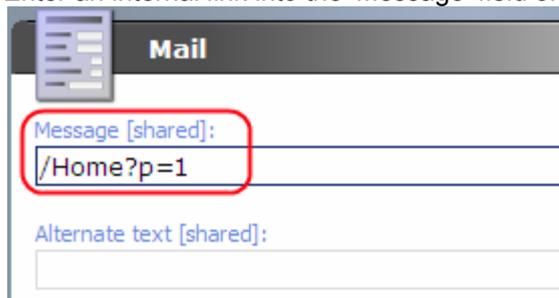


3. Choose a device you want to use with the new layout. Fill in the Query String field of the Detection section. The value specified here will be used as an URL parameter which indicates that this

particular device should be used for rendering.



4. Create an 'Url Mail'.
5. Enter an internal link into the 'Message' field of an email with the appropriate parameter:



In our case, the body of the email will contain the content of the Home Item rendered using the Print device.

Chapter 8

Module Localization

Learn here how to localize field names and MailingList titles.

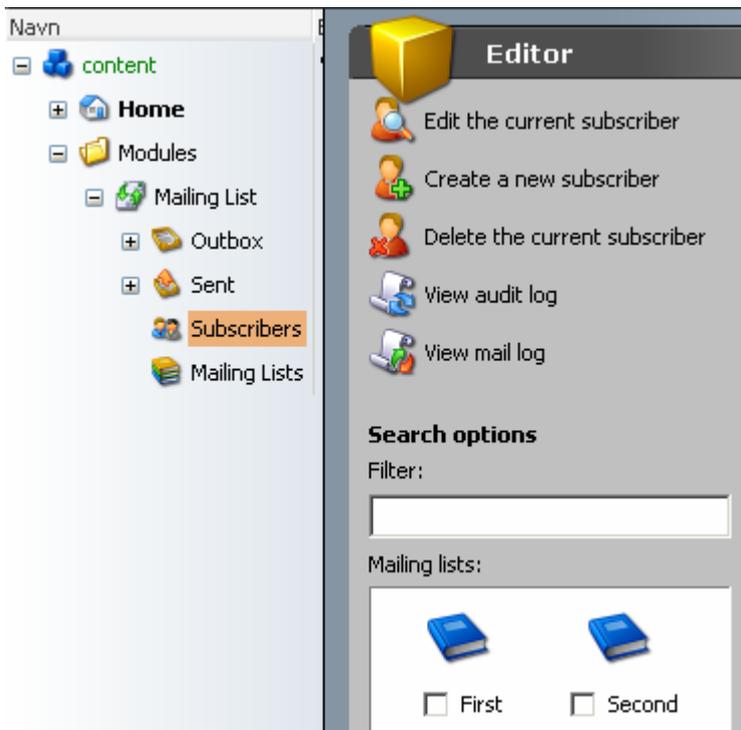
8.1 Localizing Field Names

Field names are localized by editing the Title properties of a field in the Template Editor (See [Field Properties](#) » [Data Properties](#) for details).

- Open the appropriate template.
- Switch the language.
- Enter a field name into the 'Title' field of the field you wish to localize.

8.2 Localizing MailingList Titles

It is possible to localize titles of MailingList options and commands. For instance, the options of the Subscribers Manager window:

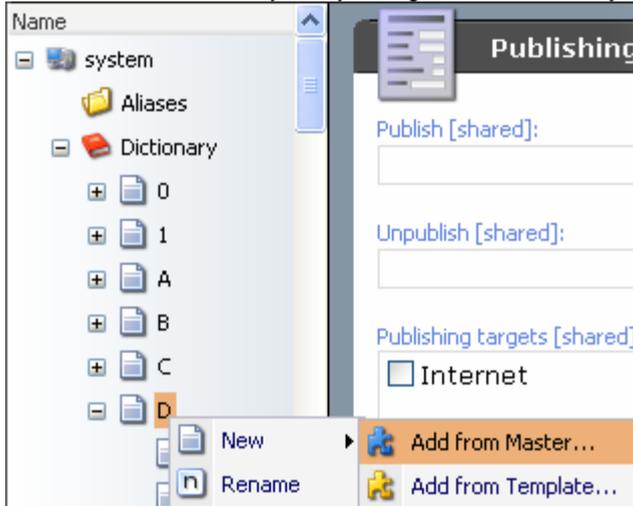


Do the following to localize a title:

- Switch to the *core* database.
- Go to *System/Dictionary/*. This item contains the translations definitions.



- Create a new dictionary entry using the `Dictionary entry` branch template.



The `Sitecore.Globalization.Translate.Text("_key_text_")` method is used to insert the title values of the MailingList titles. This method searches for a given key-text in the `System/Dictionary/*` folder of the core database. If the key is found, the text in the appropriate language is returned.

The key field must be the same for all languages. Use the Phrase field to specify the translated text.

Chapter 9

Sending Mails in Background

When a lot of mails are being sent, client freezes until all mails are sent. You can turn on asynchronous sending method that allows continuing work with client after send is activated.

For activating you should open Mailing List settings page (*Sitecore » All Applications » MailingList Module » Settings*) and set parameter Sendmethod in to “async” in the *Sending* section.

If asynchronous sending method is used, the following window appears before Send Wizard is closed:



User can watch current mail jobs using Running jobs report. To open Running jobs page choose *Sitecore » All Applications » MailingList Module » Running Jobs* or choose appropriate link from the *Mailing List Tasks Page*.



* Use Refresh button to renew displayed information.

User can see number of unsent queued mails in the column Queued and Time since last action. If this time is very large, the background job was probably aborted, and the "Send Queued Mails" wizard should be used to resume sending of the queued mails.

When sending batchmails, this page is only updated for each smaller batch being sent (defined by BatchSize).

Important: As long as a job is still sending out mails, "Send Queued Mails" should NOT be activated. This will result in duplicate mails being sent out. Note also that "Send Queued Mails" wizard will send out mails for all mailjobs visible in this window. If you do not want this, you should run "Cancel Queued Mails" before starting a new mail sending.

Chapter 10

Executive Summary

The "Executive Summary" page allows viewing a report of the Mailing List activities over a given period of time.

To access this page, select *Sitecore » All Applications » Mailing List Module » Executive Summary* or pick the Executive Summary application from the MailingList task pane.



Executive Summary window :



To view the summary, select the time period using the "Start" and "End" combo boxes and click the green arrow button.

10.1 Executive Summary Columns

Mails Section

Date

The last mail action date.

Subject

The mail subject.

Recipients

The number of mail recipients.

Opened

Indicates how many **unique users** have opened the mail.

Clicked

Indicates how many **unique users** have clicked the link.

Opened Count

Indicates how many times the mail was opened.

Clicked Count

Indicates how many times the mail URL was clicked.

Queued

The number of queued mails

Failed

The number of mails which could not be sent for some reason

Unsent

The number of unsent mails

Mailing Lists:

MailingList

The Mailing list name

New Subscribers

The number of subscribers which subscribed to the list within the specified period

Lost Subscribers

The number of subscribers which were unsubscribed from the list within the specified period

Before Period

The number of subscribers in the list before the specified period

After Period

The number of subscribers after the current period

Difference

The difference between the *Before Period* and *After Period* columns.

Rate

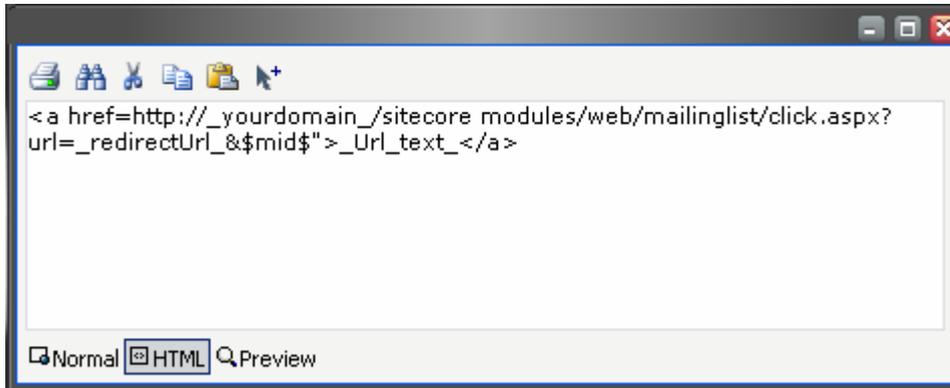
The relative difference between the *Before Period* and *After Period* columns.

10.2 Monitoring URL Clicks

It is possible to monitor whether a user clicked on the URL in the mail.

Follow the instructions below to implement this functionality.

1. Create an Html email.
2. Switch to HTML view



Insert the link as described below:

```
<a href="http://_yourdomain_/sitecore  
modules/web/maillinglist/click.aspx?url=_redirectUrl_&$mid$">_Url_text_</a>
```

3. Switch to the normal mode, save and send the mail.

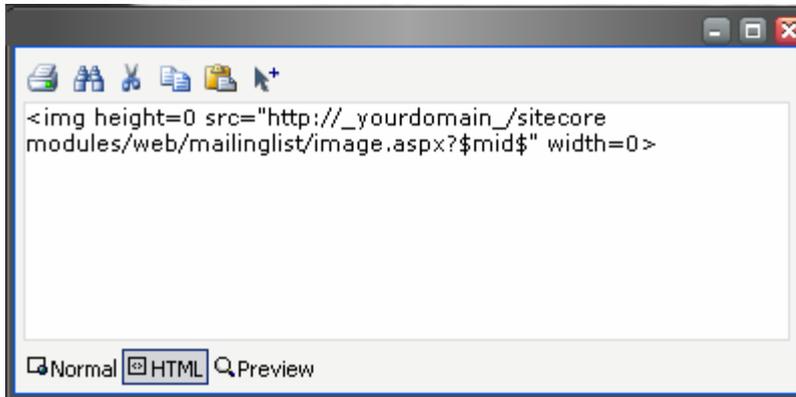
Now the CLICKED COUNT counter will be incremented each time a user clicks the link; the CLICKED counter will be incremented each time a *unique user* clicks the link.

10.3 Monitoring Opened Emails

It is possible to monitor whether an email was opened.

Follow the instructions below to implement this functionality.

1. Create an Html email.
2. Switch to HTML view.



Insert the image tag as described below:

```

```

3. Switch to the normal mode, save and send the mail.

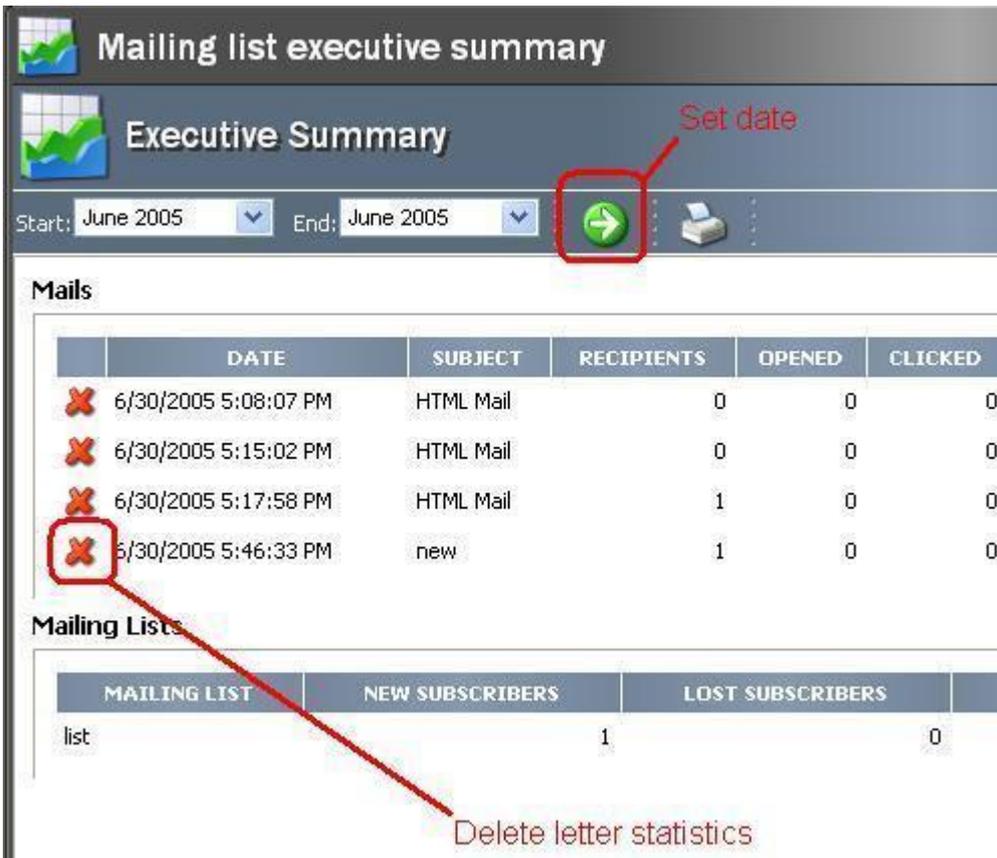
Now the OPENED COUNT counter will be incremented each time a user opens the mail; the OPENED counter will be incremented each time a *unique user* opens the mail.

10.4 Deleting mail from database

MailingList module provides a possibility to delete unnecessary letters statistics.

Open *Executive summary* page (open *Mailing Lists Tasks Page* from main menu, choose *Mailing list* and click **Executive summary** or choose **Executive Summary** menu item just from *Sitecore » All Applications » Mailing List Module* menu).

On the opened page set appropriate range of date and click Search. You will see list of sent mails. There is a red cross button near each mail, which invokes Delete Wizard. You should confirm deleting or cancel it by pressing button Cancel in the Wizard.



Mailing list executive summary

Executive Summary

Start: June 2005 End: June 2005 **Set date**

Mails

	DATE	SUBJECT	RECIPIENTS	OPENED	CLICKED
	6/30/2005 5:08:07 PM	HTML Mail	0	0	0
	6/30/2005 5:15:02 PM	HTML Mail	0	0	0
	6/30/2005 5:17:58 PM	HTML Mail	1	0	0
	6/30/2005 5:46:33 PM	new	1	0	0

Mailing Lists

MAILING LIST	NEW SUBSCRIBERS	LOST SUBSCRIBERS
list	1	0

Delete letter statistics

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