



NEWSLETTER MODULE

MANUAL



OTYS Recruiting Technology



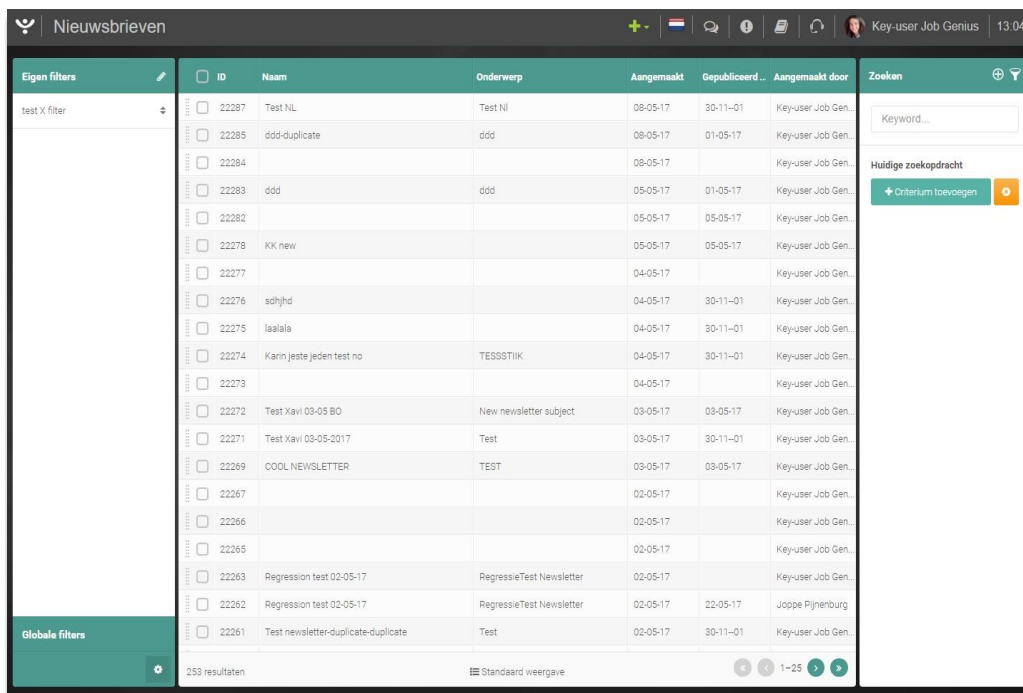
CONTENT

1 Introduction	4
1.1 About the Newsletter module	4
1.2 Purpose of this manual	4
2 Create and edit newsletter	5
2.2 Create a newsletter	5
2.3 Language settings	13
3 Send newsletters	17
3.1 Send test newsletter	17
3.2 Mailing lists	17
3.3 Send newsletter	19
4 Publish newsletters	20
5 Queue	22

1 | INTRODUCTION

1.1 ABOUT THE NEWSLETTER MODULE

The OTYS Newsletter Module allows you to create, publish and send newsletters. Your newsletters are displayed in a template ('look & feel') that we put together for you. You can then send these newsletters to one or more groups of recipients ('mailing list') and/or publish them on your website. If you send newsletters to a mailing list, they are always sent as individual emails. This prevents your newsletter from being classified as spam and allows you to start the newsletter with a personal salutation for the recipient.



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	22271	Test Xavi 03-05-2017	Test	03-05-17	30-11-01	Key-user Job Gen...	
	22269	COOL NEWSLETTER	TEST	03-05-17	03-05-17	Key-user Job Gen...	
	22267			02-05-17		Key-user Job Gen...	
	22266			02-05-17		Key-user Job Gen...	
	22265			02-05-17		Key-user Job Gen...	
	22263	Regression test 02-05-17	RegressionTest Newsletter	02-05-17		Key-user Job Gen...	
	22262	Regression test 02-05-17	RegressionTest Newsletter	02-05-17	22-05-17	Joppe Pijnburg	
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253 resultaten

Fig. 1 – Newsletter Module in OTYS Go!

1.2 PURPOSE OF THIS MANUAL

In this manual we explain how to use the OTYS Newsletter Module to share news with candidates, clients and any other parties.

2 | CREATE AND EDIT NEWSLETTERS

2.1 INTRODUCTION

In this chapter we explain how to create, edit, and search for newsletters and in the Newsletter Module.

2.2 CREATE A NEWSLETTER

2.2.1 CREATE A NEW NEWSLETTER

To create a new 'blank' newsletter, click on the green plus icon you see at the top of the list of newsletters and select 'Blank newsletter'. This creates a blank newsletter that you can complete.



Fig. 2 – Create a new newsletter

2.2.2 DUPLICATE AN EXISTING NEWSLETTER

You can also duplicate an existing newsletter. This can be useful, for example, if you have completed a newsletter and then want to create a slightly different version. You can do this by using the search filter to search for the newsletter you want to use (see Section 2.4). Click on the newsletter in the list to open it on your screen. Then click on the 'Duplicate' button in the top right corner of the newsletter. The selected newsletter will be copied and opened immediately.

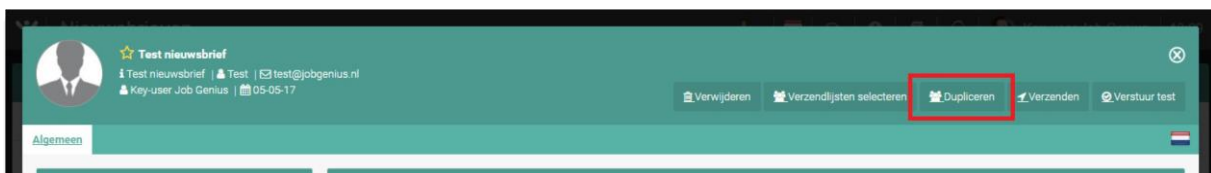


Fig. 3 – Duplicate newsletter

We recommend that you change the name of the copied newsletter immediately, so you can easily retrieve the duplicated newsletter. You can then make any other changes you want in the newsletter.

2.2.3 VIEW AN EXISTING NEWSLETTER

Do you want to view an existing newsletter? Use the search filter to find the newsletter you want to use (see Section 2.4) or search for the letter manually in the view list. Click on the newsletter in the list to open it on your screen.

The detailed view is structured as follows:

- On the left of your screen you will see a 'Newsletter information' widget. Here you will find general information about the newsletter and you can edit this information.
- On the right of your screen you will find the 'Example' widget. Here you can see a preview of the newsletter and you can change the content of this newsletter (see Section 2.1.5). Please note: This preview is only an indication of what the newsletter will look like. You can get an exact preview of what the newsletter will look like by sending it to a test email address.

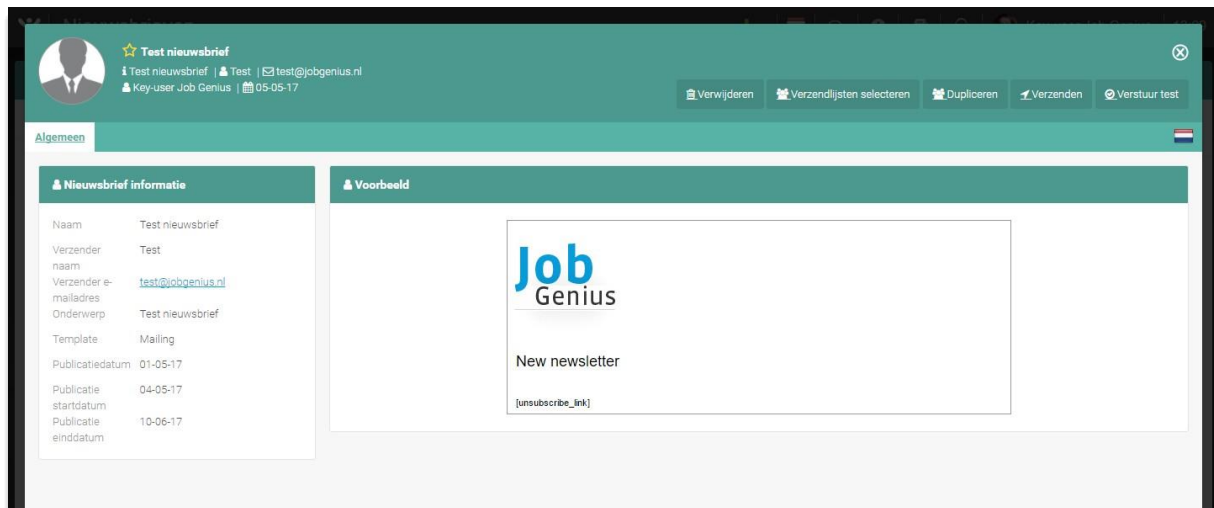


Fig. 4 – Newsletter detail view

2.2.4 BASIC NEWSLETTER SETTINGS

In the 'Newsletter information' widget you will find general information about the newsletter. You can change this information by clicking on the 'Edit' icon in the top right corner of the widget. You can change the following details:

- **Name**
You can give the newsletter a name, for example 'Newsletter OTYS Q1 2017'. This name is for internal use and will not be displayed to your newsletter recipients. However, it will be displayed if you publish the newsletter on your website.
- **Sender name**
Once you are ready to send your newsletter, this name will be used as the sender name. Here you can enter your company name (or a variation).

- Sender email address

The email address you enter here will be used as the sender's email address. In principle, you can enter any email address, as long as it is an email address of a domain linked to your OTYS system. It is possible to enter a non-existing email address from within your own domain here (e.g. noreply@yourdomain.uk). However, this means no responses to the newsletter, such as requests or error messages, can be delivered.

- Subject

The subject of the newsletter will be displayed to the recipients. This could be something like 'New job offer'.

- Template

You use this option to determine the layout of your newsletter. The OTYS Web Developers can create a template for you based on your specifications, or edit an existing template. If you are interested in a different or customised template, you can contact your account manager.

- Layout

Based on the selected template, your newsletter can have one or more layouts. You could for example have a '1-column' layout or a '2-column' layout. The OTYS Web Developers can create a layout for you based on your specifications or edit an existing layout. If you are interested in a different or customised layout, you can contact your account manager.

- Ready to send

Once you are ready to send the newsletter, you can use this option to indicate that the newsletter is ready to be sent. This releases the 'Send' button so the newsletter can be sent.

- Save after sending

If you want to save the newsletter in the recipient's folder, you can use this option. The newsletter will then be placed in the recipient's folder. Keep in mind that a folder with just one personal email gives a much clearer overview than a folder with 20 different newsletters and one personal email.



Fig. 5 – Newsletter information widget

Once you have finished editing these options, click on the 'Save' icon in the top right corner of the widget and your changes will be saved.

2.2.5 EDIT NEWSLETTER CONTENT

The 'Preview' widget will show you a preview of the newsletter. You can find the edit options by clicking on the 'Edit' icon in the top right corner of the widget. These options are:

- Add introduction
A newsletter can have one introduction. This is shown directly under the main heading of the newsletter. You can click on the 'Add intro' icon in the upper right corner of the widget to add a new introduction to a newsletter. You will only see this option if no introduction has yet been added to the newsletter. You can then click on the 'Edit item' button below the introduction to edit the content.
- Edit introduction
You can click on the 'Edit item' icon under an existing introduction to edit it. More information on editing an introduction can be found in Section 2.1.6.
- Delete introduction
You can click on the 'Delete item' icon under an existing introduction to delete the introduction. You can also delete an introduction by opening it and clicking on the 'Delete' button.
- Add item
A newsletter can have multiple items. Each item usually consists of a sub-heading with content. You can click on the 'Plus' icon in the upper right corner of the widget to add a new item to a newsletter. More information about adding an item can be found in Section 2.1.7.
- Edit item
You can click on the 'Edit item' icon under an existing item to change the item. More information about editing an item can be found in Section 2.1.7.
- Move item
If you have placed multiple items in your newsletter, you can also edit the order of those items. If there are several items in your newsletter, you will see a 'Move up' and a 'Move down' icon for each item. You can click on these icons to move the item.
- Delete item
You can click on the 'Delete item' icon under an existing item to delete the item. You can also delete an item by opening it and clicking on the 'Delete' button.

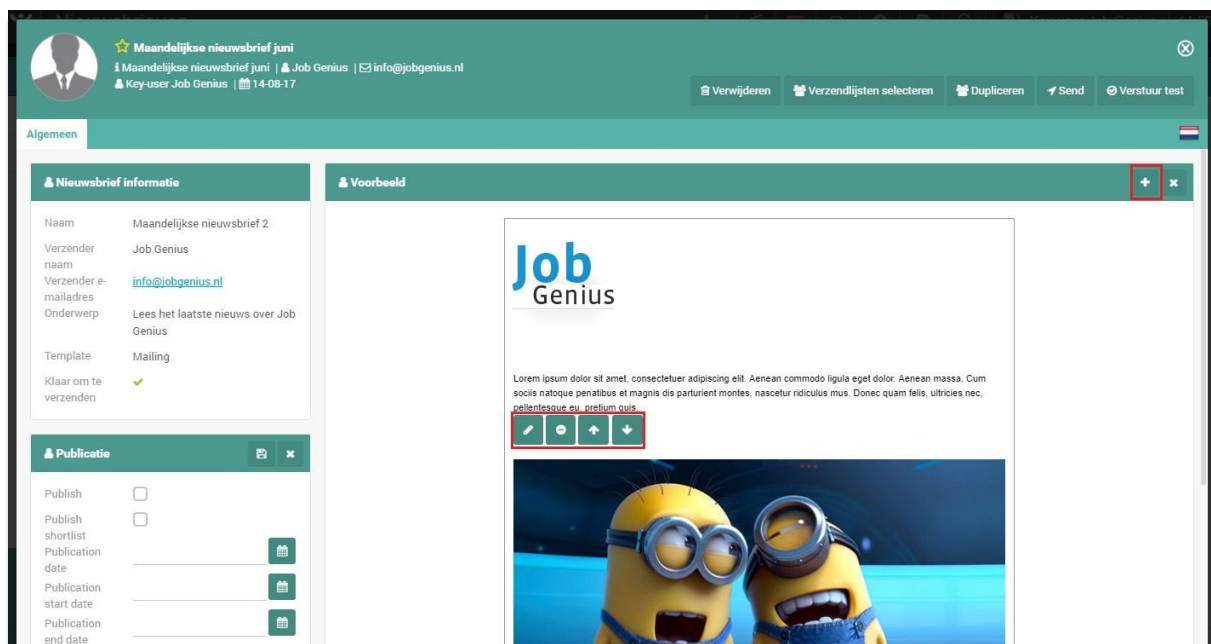


Fig. 6 – Edit newsletter content

2.2.6 EDIT INTRODUCTION

If you click on the 'Edit intro' icon in the preview view, this will open the detailed view of the introduction. On the right side of your screen you will see an example of the introduction. Click on the 'Edit' icon in the top right corner of this widget to open a text editor that allows you to complete this introduction. You can place a text here and use the bar at the top of the text editor to edit the formatting of any part of this text. After you have made these edits, click on the 'Save' icon in the top right corner of the widget. If you then close the detail view of the introduction (with the 'Close' icon in the top right corner), you return to the preview and you can see the edits you made.

2.2.7 EDIT ITEM

If you click on the 'Edit item' icon in the preview, you can open a detailed view of the item. You can edit an item in a similar way as you edit an introduction (see Section 2.1.6). When editing an item, you can also specify with the 'Article information' widget what the heading of the item should be and in which column the item should be placed. You can edit this information with the 'Edit' icon in the top right corner of the widget, and then save those edits by clicking on the 'Save' icon.

2.2.8 USE IMAGES

You can of course also add images to your newsletter. You can add images to both an introduction and an item. You can do this by editing the introduction or item, which will give you two options to add an image to the newsletter:

1. Image linked to intro/item

You first click on the 'Edit' icon in the top right corner of the 'Image' widget and then click on the image in the widget to add an image from the media library in your OTYS Go! system. After you select the image, click on the 'Select' button at the bottom right. Then click on the 'Save' icon for the 'Image' widget in the top right corner to add or edit the image. You can link one image to each introduction or item in this way. If you follow these steps for an introduction or item that already has an image, the existing image will be replaced. More information about this functionality can be found in the 'Media library' manual.

2. Image placed in intro/item text

You first click on the 'Edit' icon in the 'Preview' widget in the top right corner and then click on the 'Image' icon in the top bar to place an image in an introduction or item. You can then add an image URL or add a new image. You can add additional items such as the ALT text for the image with the 'Advanced' tab. After you click on the 'OK' button, the image is placed in the text.

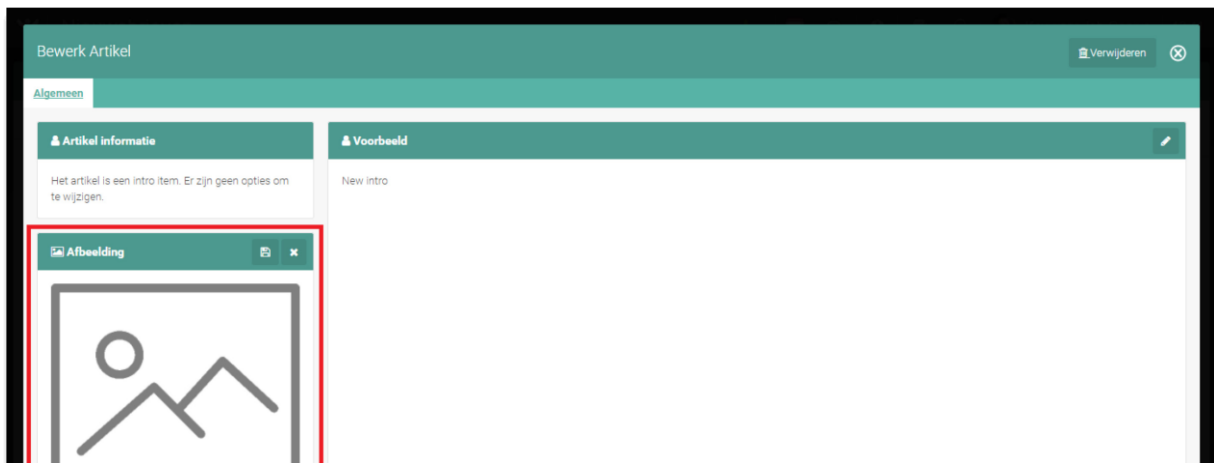


Fig. 7 – Edit linked image

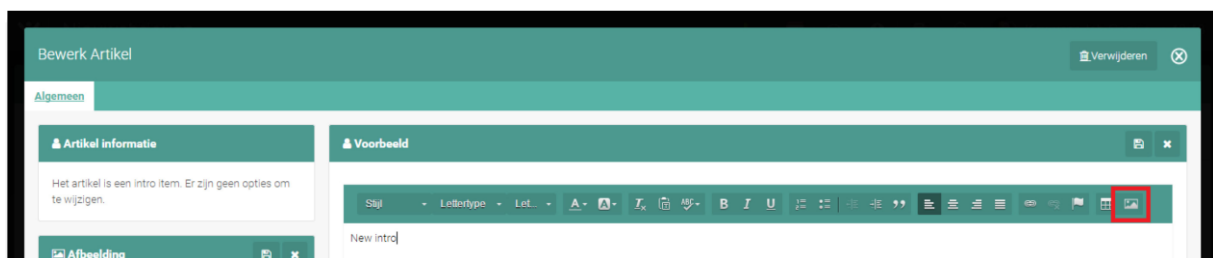


Fig. 8 – Add image to text

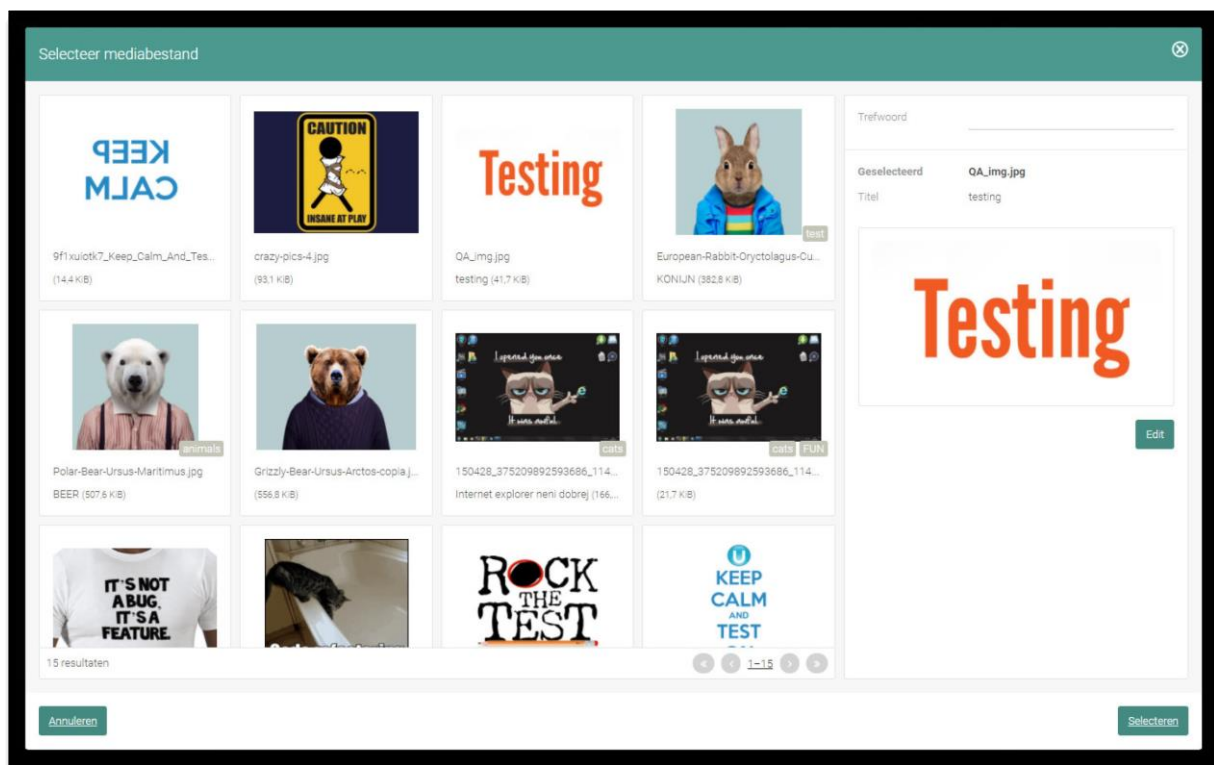


Fig. 9 – Media library

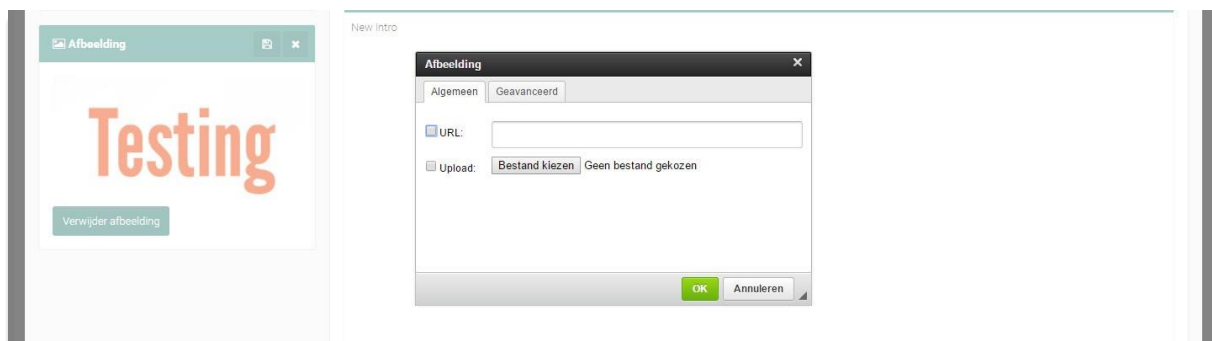


Fig. 10 – Options when adding an image to text

2.2.9 USING LINKS

You can also add links to your newsletter. You can add a link to both an introduction and an item. You can do this by editing the introduction or item. Then select the text you want to link to (if you do not yet have a 'link text', you first need to enter the text, then select it) and click on the 'Insert/edit link' icon in the tool bar at the top of the text. In the 'URL' field, enter the URL of the page you want to link to. There are other additional (advanced) options in the 'Target window' and 'Advanced' tabs that you may not use very often. Next click on 'OK' button at the bottom to add the link to the selected text. The link has now been added to the selected text. You can change an existing link in a similar way.

If you want to delete a link, select the text (with the link) and click on the 'Delete link' icon in the tool bar at the top of the text. The link has now been removed (and the text is obviously retained).

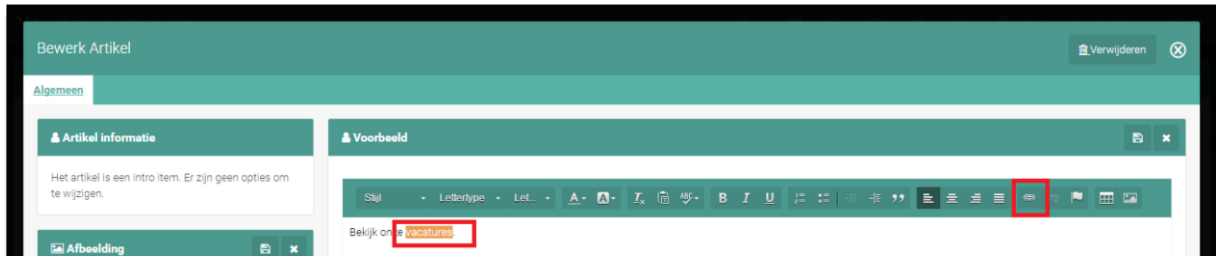


Fig. 11 – Select link text



Fig. 12 – Add link to link text

2.2.10 USE MERGE FIELDS

It is also possible to add merge fields to a newsletter. This is currently only possible in items. To do this, change the item. Then place the cursor where you want the merge field. At the top of the 'Preview' widget, select the desired merge field under 'Merge fields' and click the 'Insert' button. You will see that a code is added at the spot where your cursor is.

It is important that you do not change this code (this is automatically adjusted when sending the newsletter). You have the following merge fields at your disposal:

- Salutation
You can use this to insert a salutation in the newsletter (e.g. 'Dear First Name' or 'Dear Sir/Madam Surname'). When you send the newsletter, you can specify whether you want to use an informal or formal salutation. This way every recipient will see a 'personal salutation' in the newsletter.
- Self-reference
This allows you to place a link in the newsletter that refers to an online view of the newsletter. The recipient can click on this link to read the newsletter in an internet browser. This can be useful if the recipient's email program does not support the correct display of the newsletter.

- Whitelist statement

This allows you to ask the recipient (once) whether or not you are permitted to send the user newsletters. This is an addition to the 'unsubscribe' link at the bottom of the newsletter.

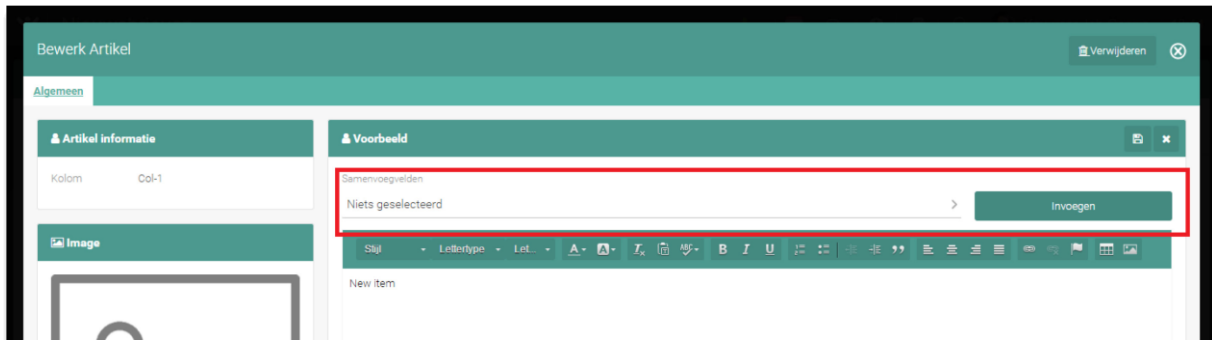


Fig. 13 – Add merge field

2.3 LANGUAGE SETTINGS

To ensure every recipient receives the newsletter in their own language, you can create and set up the newsletter in several languages. If you then send the email in different languages, the mail drafted in and set to French will only be sent to recipients with French language settings. If your website is available in multiple languages, in this way, you can also correctly publish the newsletter in all your website languages.

In the top right corner of your Newsletter Module you will see a flag of the currently selected language for your Newsletter Module. Based on this language, for example the name of the newsletter and the topic of the newsletter in the list are shown in the correct language. This language will also be selected by default if, for example, you open a newsletter or create a new newsletter. You can edit this language by clicking on the flag at the top of the list.

In the detailed view of a newsletter you will find a similar flag in the top right corner. Again, it is possible to change the language by clicking on the flag and selecting the desired language.



Fig. 14 – Current language in Newsletter Module



Fig. 15 – Change language in Newsletter Module

Note that only the languages available for your system are displayed. If you already use our multilingual functionality (and therefore can see several languages here), but you want to activate an additional language, you can contact our Customer Support department. If you do not yet use our multilingual functionality (and therefore can only see one language here), you can contact your account manager for more information.

2.4 SEARCH AND FILTER

You can quickly find a previously created newsletter by using the OTYS filter and search functionality. This is displayed in the right panel of your OTYS screen (see image). Here you can add multiple criteria to find the right search result. If you want to use this combination of search criteria more often, you can save the search as a filter. The filter can then be found in the left-hand panel of your screen, so that you can carry out your saved search with a single click at any time.

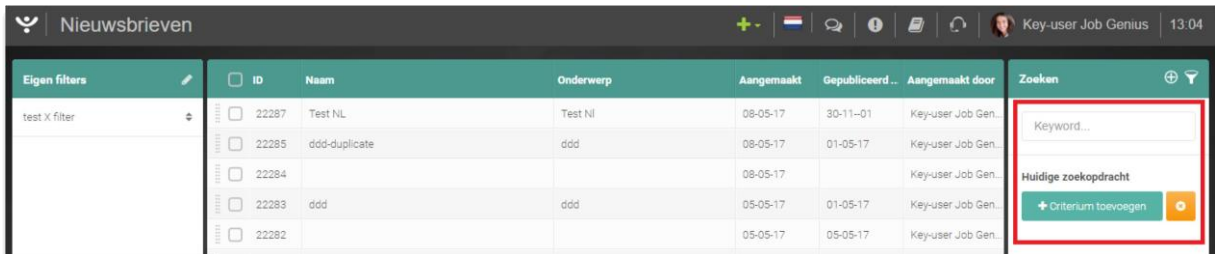


Fig. 16 – Search filter in Newsletter Module

In your Newsletter Module, you have the following search options at your disposal:

- **Keyword**
You use this to search for the relevant keyword in the name of the newsletter, the subject of the newsletter and the title that is displayed at the top of the newsletter.
- **Created by**
This allows you to search for newsletters based on the person who created the newsletter.
- **Published**
This allows you to search for newsletters with the 'Published' box checked or unchecked.
Note: whether the newsletter is actually published on your website depends on multiple factors. You can read more about this in Chapter 4 ('Publish newsletters').

- Entry date
This allows you to search for newsletters based on the date they were created. You can specify both a start date and an end date.
- Ready to send
This allows you to search for newsletters that you have marked as 'Ready to send'. You can read more about this in Chapter 4 ('Publish newsletters').
- My favourites
You can mark a newsletter as a favourite with the 'Favourites' icon in the top left corner of a newsletter. You can use this search filter to search for these favourite newsletters.
- Shortlist publication
This allows you to search for newsletters where the 'Shortlist publication' check box is checked or unchecked. Note: whether the newsletter is actually published in the shortlist depends on multiple factors. You can read more about this in Chapter 4 ('Publish newsletters').
- Birthday mailing
This allows you to search for newsletters with the 'Birthday mailing' check box checked or unchecked. Note: whether the newsletter is actually used as a birthday mailing depends on additional settings. If you have any questions about this, please contact our Customer Support department.
- Sent
This allows you to search for newsletters that have been sent to a mailing list at least once.

We will discuss searching and filtering in OTYS Go! in more detail in the 'Lists, Search and Match in Go!' manual. We have chosen to describe this functionality in a separate manual, because the instructions are the same for multiple OTYS Go! modules.

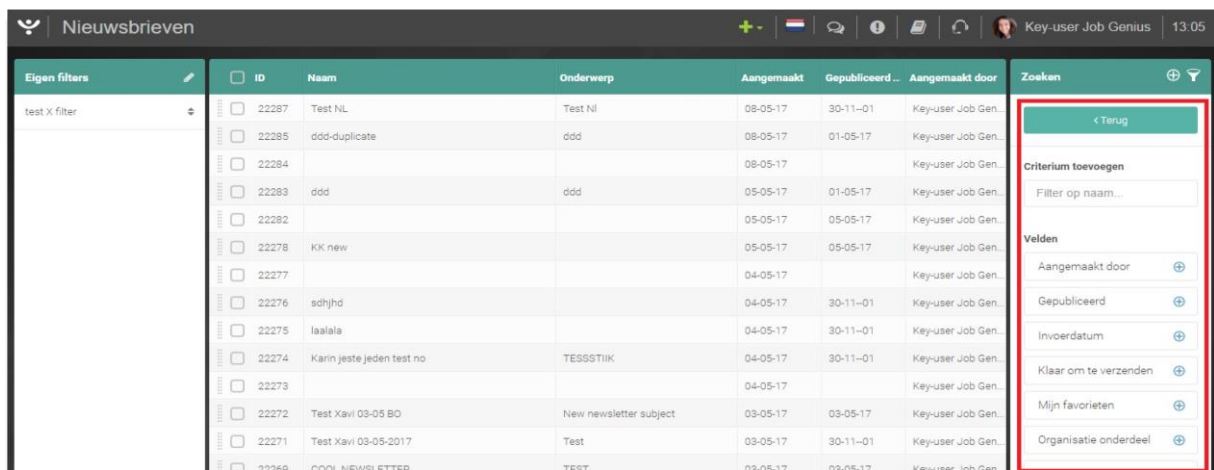


Fig. 17 – Search options in Newsletter Module

2.5 EDIT YOUR LIST VIEW

Do you want to edit the columns in the overview? You can do this by clicking on 'Standard view' at the bottom of your screen. Here you can add, delete and change the order of columns. You can always use this option by saving the new view. Instructions on the best way to use this function are given in the manual 'Lists, Searches and Matching in Go!'.

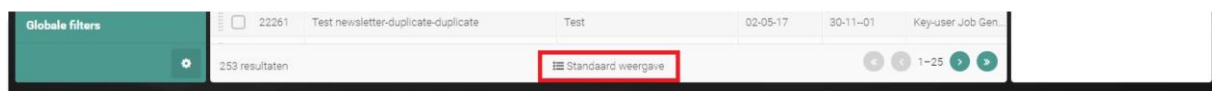


Fig. 18 – Name of view in Newsletter Module

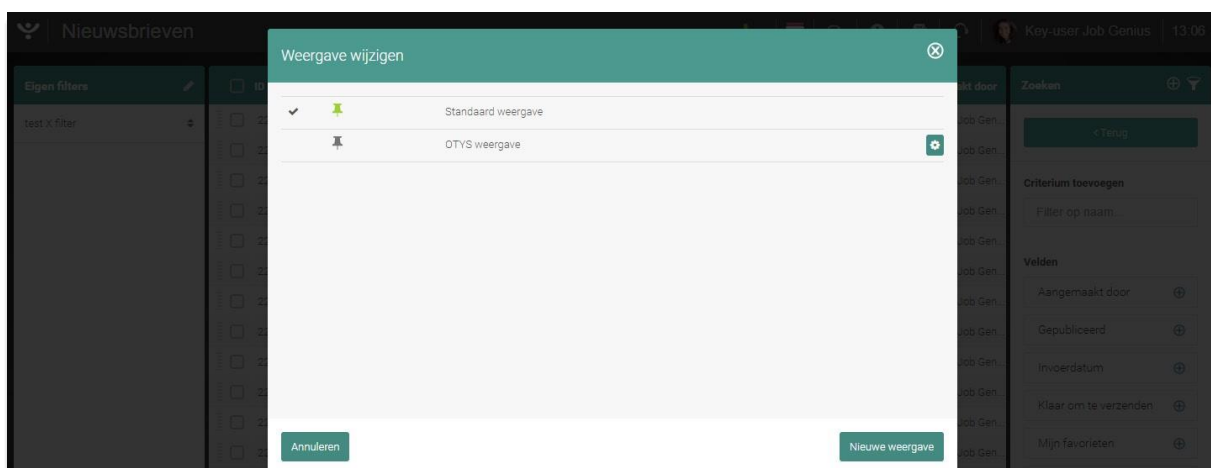


Fig. 19 – Edit the view in Newsletter Module

3 | SEND NEWSLETTERS

3.1 SEND TEST NEWSLETTER

You can test what the mail will look like by sending a test email to your own email address. This can be done with the 'Send test' button, displayed in the top right corner of the detail view of your newsletter. Click on this button to open a window where you can enter an email address. After entering this address, click on the 'Send test' button at the bottom right and the test newsletter will be sent to the email address specified.

Please note: This functionality was created to give an example of what the newsletter will look like in *your* email program. This test newsletter may differ slightly from the actually sent newsletter. The set salutation, for example, will not actually be displayed. If you want a 'real' example of how the newsletter will look, you will need to send it to a (test) mailing list with only your email address in it.

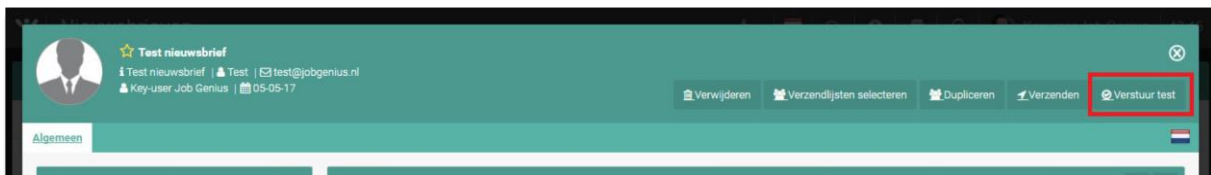


Fig. 20 – Send test newsletter

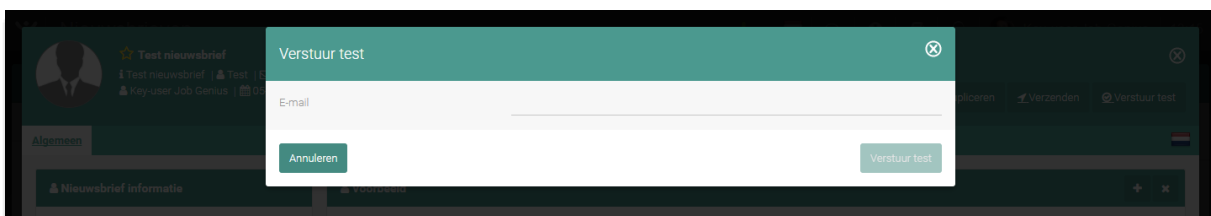


Fig. 21 – Enter email address for test newsletter

3.2 MAILING LISTS

A newsletter always needs to be sent to a mailing list. A mailing list is a list of recipients. These can be colleagues, candidates, contacts or self-created recipients. Even though you work with a mailing list, the OTYS system always sends your newsletters in individual emails. This allows you to add a personal salutation to the newsletter. This also prevents your recipient's mailbox from marking your newsletter as bulk mail and therefore as spam.

3.2.1 CREATE NEW MAILING LIST

In both your Candidate Module (in the list of candidates) and CRM Module (in the list of contacts) you have a batch action 'Add to mailing list'. If you click here you can create a new mailing list by filling in the name and clicking on the button 'Create new mailing list'. If you want this mailing list to be automatically deleted after a week, check the 'Temporary' check box. Then click on the 'Confirm' button to confirm this action. The mailing list is then created and the selected people are added to this (new) mailing list.

3.2.2 ADD PEOPLE TO AN EXISTING MAILING LIST

It is also possible to add the selected people to an existing mailing list. You can do this after completing the batch action, by clicking on the mailing list to which the people need to be added. You do not create a new mailing list, but you add the people to the existing mailing list.

3.2.3 ASSIGN MAILING LIST TO YOUR EMAIL

At the top right of the detailed view of your newsletter you can use the 'Select mailing lists' button to determine which mailing list(s) this newsletter should be sent to. After clicking on this button, a window will open where you see the available mailing lists on the left. By clicking on a mailing list on the left, you 'select' it, and it is displayed on the right of the window. By clicking on a mailing list on the right, you deselect this selection and it will be displayed on the left again. After you have finished selecting the mailing lists, click on the 'Save linked mailing lists' button at the bottom right.

You can find more information about the use of these mailing lists in our 'Mailing lists' manual.

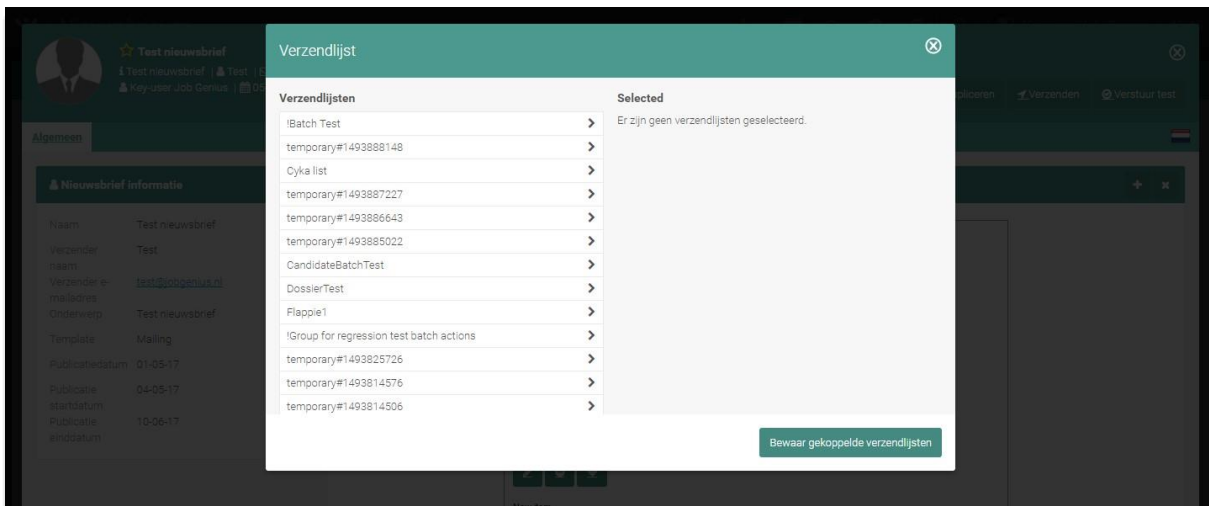


Fig. 22 – Select mailing lists

3.3 SEND NEWSLETTER

Once you have compiled a newsletter and have selected at least one mailing list for the newsletter, you can send the newsletter. To do this, click on the 'Send' button in the top right corner of a newsletter detail. A window opens giving you the following options:

- You will see a list of addresses to which the newsletter will be sent. If you do not want to send the newsletter to certain addresses, you can place a check mark next to 'Excluded' for the address you want to leave out and click on the 'Save' button at the bottom. So you only need to do this if you do not want to send a newsletter to certain addresses. With the filter at the top of the window you can search for addresses that cause errors (e.g. because an informal salutation is used even though there is no first name available for the recipient) or search specifically for addresses that are or are not excluded.
- Under 'Sending preferences', you can specify when you want the newsletter to be sent. This allows you to 'prepare' a newsletter in advance and then send it at the desired time. Please note: if there are several customers sending newsletters at the same time, this will create a queue. This means we cannot guarantee your newsletter will be sent at the selected time.
- Under 'Salutation' you can indicate whether your newsletter should have an informal or formal salutation. If you want a salutation, you will need to have placed the salutation somewhere in the newsletter (see Section 2.1.10).

Once the above options are set correctly, you can click on the button 'Send newsletter' at the bottom right to send the newsletter.

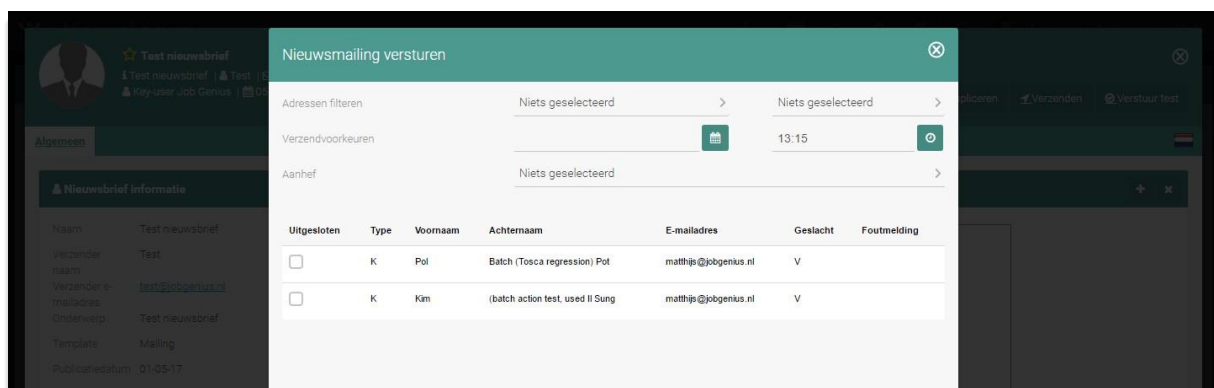


Fig. 23 – Send newsletter

4 | PUBLISH NEWSLETTERS

You can publish your written newsletters on your website. To do this, you place the 'Publications – Newsletters' module on a page of your choice with your CMS. You can also get a Web Developer to place a 'shortlist' with newsletters in certain positions within your website. More information about the use of the CMS can be found in the 'CMS Module' manual.

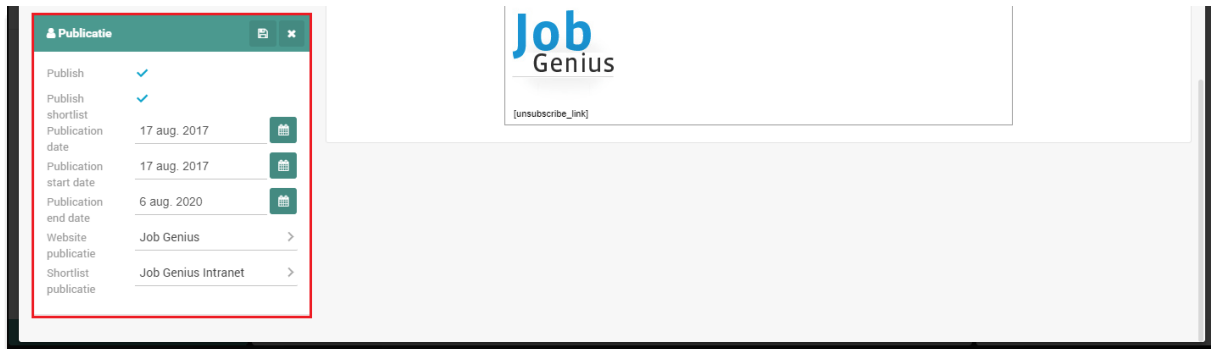


Fig. 24 – Widget to publish your newsletter

You can then publish a newsletter on your website with the Newsletter Module. In the 'Publication' widget you will find the publication settings for the newsletter. You can change this information by clicking on the 'Edit' icon in the top right corner of the widget. You can change the following details:

- Publication
If you decide to publish your newsletter on your website, you specify with this option that the newsletter must be published. Note that you also specify the period in which the newsletter should be published (with the fields 'Publication start date' & 'Publication end date') and on which website(s) the newsletter should be published (with the 'Website publication' field).
- Website publication
This option allows you to select the website(s) where you want your newsletter published.
- Publish shortlist
If you have a 'news shortlist' on your website and decide to publish your newsletter in this shortlist, you indicate with this option that the newsletter should be published in the shortlist. Note that you also specify the period in which the newsletter should be published (with the fields 'Publication start date' & 'Publication end date') and on which website(s) the newsletter should be published (with the field 'Website shortlist').
- Website shortlist
This option allows you to select the website(s) where you want your newsletter published in the shortlist.

- Publication date

If you decide to publish your newsletter on your website, the newsletters will usually be sorted based on the publication date. You use this option to determine the publication date of your newsletter.

- Publication start date

If you decide to publish your newsletter on your website, you use this option to indicate from when the newsletter should be published. This way you can 'prepare' a newsletter that will automatically be published on your website on the selected date. If you want the newsletter to be published immediately, you can select today's date.

- Publication end date

If you decide to publish your newsletter on your website, use this option to indicate until when the newsletter should be published. The newsletter will automatically be removed from your site on the end date entered. If you want the newsletter to stay on your site for a long time, you can select a date in the very distant future (e.g. 01-01-2030). By clicking on the name of the month or year in 'date select', you can 'go up' a level so you do not have to click so often to go to a date far into the future.

5 | QUEUE

After you have sent your newsletter (see Section 3.3), the mailing of your newsletter will be placed in the queue. Depending on how busy it is (i.e. the number of newsletters being sent by other OTYS customers), there may be a delay in the newsletter actually being sent.

You can open the queue by clicking on 'Queue' at the top of the Newsletter Module. Here you can see an overview of the newsletters that are currently in the queue (or have been in the queue).

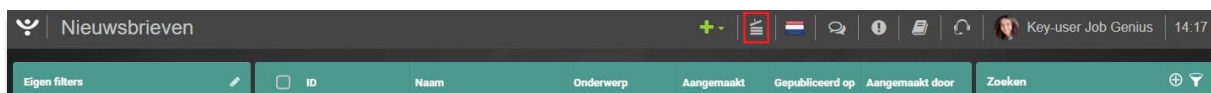


Fig. 25 – The 'Queue' button at the top of the Newsletter Module

In the queue you will find both sent newsletters and sent emails to mailing lists.

You can see the status and a progress percentage per newsletter. For example, if you send a newsletter to 1,000 email addresses and 500 newsletters have already been sent, then the progress will be shown as 50%.

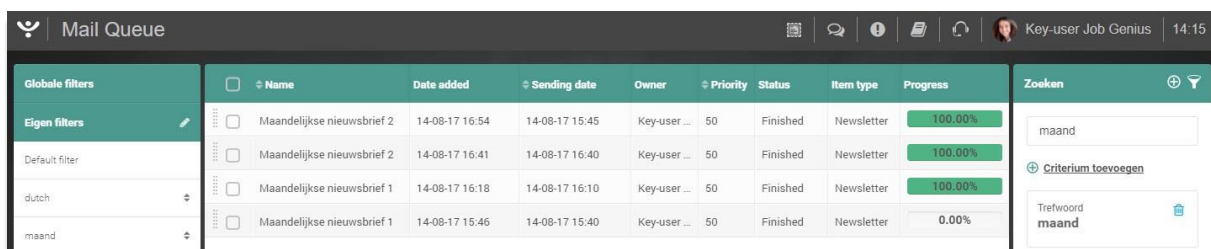


Fig. 26 – Queue with sent newsletters, including progress percentage

You will also see for each newsletter which percentage of recipients has opened the newsletter. This is calculated by adding a very small, invisible and unique icon to each newsletter that is sent. As soon as this image is downloaded from the server, we mark the newsletter as 'read' and adjust the percentage. This allows you to experiment with the most favourable mailing times and subject lines for your target group.

You can see more details about an item by clicking on this item in the queue. If the sending of the newsletter has not yet begun, you are also able to change the set time in the 'Mailing queue information' widget.