



# BLUE CHAMELEON Case Studies

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**Blue Chameleon Full Documentation.***



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# Appendix F

## An Electronic Newsletter

In essence, a newsletter is a periodic, informative email that is massively sent to a list of contacts. While a simple document in itself, it nonetheless enables powerful and straightforward ways to achieve fruitful communication between a company and its clients or prospects. The frequency with which it is sent helps to strengthen faithfulness so that your name is never to be forgotten.

In order to assist you in this important task, we aimed to design a system that is at the same time intuitive to use and efficient in its realizations.

### F.1 Introducing the case

Basically, the creation and sending of a newsletter would call for three major steps :

- first, having a list of contacts ready (or creating it from scratch) ;
- then, writing and building the document "newsletter" itself, including maybe graphics and links to websites ;
- finally dispatch the finalized newsletter to the list of contacts.

The great feature of Blue Chameleon's Customer Relationship Management is that these three deeds no longer have to be done in that strict order ; indeed, CRM's simple handling of contact lists, documents and sending make that any can be managed separately, anytime.

May you have a project for a newsletter, or just an idea thereof, it is simple to create an *electronic campaign* (7.9.8.1). Giving it an explicit name, for instance "Quadrennial Meeting", describes its intended use at first glance when using CRM. This campaign is yet an empty shell to which a contact list and/or a document is to be attached :

[After electronic campaign "Quadrennial Meeting" has just been created] :

Title	Type	Status	Creation	Contacts	Document	
<a href="#">Quadriennial Meeting</a>	Electronic campaign	Opened	20/07/2011	<input type="text"/>	<input type="text"/>	...

Clicking on the name of the campaign leads to the *Campaign Manage Page* as featured in Fig.F.1 where the following actions are possible :

- the title of title can be modified, if needed : in this case, as we for instance want this newsletter to be sent for August, we re-titled the campaign ”**Quadrennial Meeting (Aug11)**” ;
- the contact list can be associated ;
- the email header can be set up (F.2.2) ;
- the document that will be sent can be associated.

These can be done in no particular order.

**Quadrennial Meeting** (after renaming to 'Quadrennial Meeting (Aug11)') :

Campaign : View/Modify	
<b>Campaign : Quadriennial Meeting (Aug11)</b>	
User :	<b>Jones Jack</b>
Type :	<b>Electronic campaign</b>
Title :	<b>Quadriennial Meeting (Aug11)</b> <input type="button" value="Modify"/>
Status :	<b>Opened</b>
<b>Contact list</b>	
	<No contact>
	<input type="button" value="Choose"/>
<b>Email header</b>	
From :	<Your email address>
CC :	
BCC :	
Subject :	
	<input type="button" value="Modify"/>
<b>Email</b>	
	<input type="button" value="New model"/> <input type="button" value="Select model"/>

Figure F.1: This important page enables to accomplish any campaign-related deed.

## F.2 Building the newsletter

It has to be emphasized the following actions can be achieved anytime, in the succession you want.

## F.2.1 Handling contact lists



### *Advantages :*

- There is no limit to the number of contacts as gathered within a contact list : it can be just one person as well as hundreds of them ;
- there is no limit neither on the number of contact lists than can be created.

Contact lists in Blue Chameleon can be composed in different ways. Either the contact is already registered as a client (2.1), in which case s/he is simply added to the list, or s/he is created in CRM context, manually (7.9.3.1) or via the import of a CSV file (F.2.1.1).



### *Tips :*

- when building a contact list from clients (as illustrated below), look for them according to the aim of list : if it has a local aim, it is more practical to make a search according to geographical data by filling in the 'City:' or 'Zipcode' fields accordingly ;
- in case of large number of contacts to import, and/or if their data is incomplete, it is better to set up (if not already obtained by means of a spreadsheet) a CSV file of those and upload it (F.2.1.1).

In this example of an English language newsletter, clients are filtered by their preferred language, as set on their *Modify Client Page* (2.2.3) :

[Members ...](#)  /  :

**Add existing contacts to contact list**

**Contacts**

Search contacts by :

Name/Company :  Zip code/City :

Address :  Tel :

Email :  Type / Language :

...

Once set up, this "Members" contact list to which the newsletter can be associated with the campaign from the *Campaign Manage Page*, which in this case displays this :




And, on the list of campaigns, the number of contacts attached to this campaign are now displayed :




### F.2.1.1 Importing contacts

Our newsletter might still not be complete without the adding of a few prospects that showed interest. It might often happen that the information pertaining to these people is incomplete and heterogenous, though ; but it is not an issue for CRM :

 **Appending an incomplete CSV file** In the case of an electronic newsletter, only the email matters, that is why, even a list consisting only of emails could be uploaded. For that matter, as an example, here is an excerpt of a list of contacts showing lack of information for certain data, but still with a valid email for each line :

```

first name; last name; city; email
; Mason; ; mason@mail.com
Cleo; Burns; L.A.; cleo.burns@web.com
; ; ; id0521kpx23@ctu.gov
Josh; ; ; josh@ua.com
... ..
```

Blue Chameleon nonetheless allows this incomplete file to be successfully uploaded through  (7.9.3.5.1).

### F.2.2 Filling in the email header

The filling of this part, described in details at Fig.7.73, gives you the freedom to choose any mail address that you want the recipients to see as the sender of the newsletter. If needed, CC and BCC fields may be used, for instance for you to receive also a copy of the newsletter.

Once the email header has been filled in, the *Campaign Manage Page* for instance displays this :

Email header	
From :	info@company.com
CC :	
BCC :	
Subject :	Quadriennial Meeting August 11
<input type="button" value="Modify"/>	

### F.2.3 Composing the newsletter

From the *Campaign Manage Page*, you might want to create a  from scratch or  if you already prepared a template according to the tip given at F.5.2. The latter way is the most efficient through time as newsletters are composed of recurring elements.

Any way, Fig.F.4 gives a rough example on how a newsletter could be built ; but do not be afraid to enrich yours with further elements.

Once the newsletter has been composed, reviewed and deemed fine, it is added to the campaign and the *Campaign Manage Page* in this case displays this :

Email	
Model :	<a href="#">Newsletter Aug11.crm</a>
<input type="button" value="New model"/> <input type="button" value="Select model"/> <input type="button" value="Visualize"/> <input type="button" value="Remove document"/>	
PDF :	<No PDF>
Attached file :	<None> <input type="button" value="Add"/>

And, on the list of campaigns, the document attached to this campaign are now displayed :

Title	Associated PDF
<a href="#">Quadriennial Meeting (Aug11)</a>	Newsletter Aug11

### F.3 Sending it !

Only when the campaign "Quadrennial Meeting (Aug11)" has been equipped with a contact list, an email header and a document as described above, a  button appears : clicking it is necessary so that the campaign may be send, in order for you to check one last time if it is fine to send.

Then, once sure, proceed to the sending as described in 7.9.8.2.

## F.4 Managing it through time

The whole example above dealt with a newsletter called "Quadrennial Meeting August 11", attached to a campaign called "Quadrennial Meeting (Aug11)". The next newsletter, for instance to be dispatched in December, will very probably not differ a lot from the August one. That is why the clever managing offered by Blue Chameleon's Customer Relationship Management enables to save time, thanks to the duplication.

Indeed, sent campaigns can still be accessed, giving :

Campaigns / Status :  ...  /

Title	Status
<a href="#">Quadriennial Meeting (Aug11)</a>	Sent

**Campaign : View/Modify**

<b>Campaign : Quadriennial Meeting (Aug11)</b>	
User :	Jones Jack
Type :	Electronic campaign
Title :	Quadriennial Meeting (Aug11)
Status :	Sent - 29/7/2011 <input type="button" value="Duplicate"/>
<b>Contact list</b>	
<a href="#">Members</a> - 147 contact(s) (47 prospect(s), 100 client(s))	
<b>Email header</b>	
From :	info@company.com
CC :	
BCC :	
Subject :	Quadriennial Meeting August 11
<input type="button" value="Modify"/>	
<b>Email</b>	
Model :	Newsletter Aug11.crm
PDF :	<a href="#">Newsletter Aug11.pdf</a> - 29/7/2011 10:15
Attached file :	<None>

Campaign is then  'd and its title is modified :

Title :

The contact list attached to this "new" campaign is the one of August (which can be modified if needed). The subject as entered in the email header is modified to "Quadrennial Meeting December 11" and, if the changes to make to the newsletter are small, the document [Newsletter Aug11](#) is simply opened to be updated (and saved under a new name, logically "Newsletter Dec11").

It is finally be ready to be sent.


Eventually, the campaign list will display the history of those sent campaigns :



Title	Type	Status	Creation	
<a href="#">Quadriennial Meeting (Dec11)</a>	Electronic campaign	Sent	24/11/2011	...
<a href="#">Quadriennial Meeting (Aug11)</a>	Electronic campaign	Sent	20/07/2011	

## F.5 Tips

### F.5.1 Images for electronic campaigns

Images (D.1.5) to be used in documents are on the File Manager unto the predefined /OPSImages directory and then included into the document via  ; this consequently generates a document physically containing that/those image/s.

This can also be done for electronic campaigns and mails : the featured images will be embedded in the received emails.

Another way of doing (Fig.F.2) is by uploading the images on the Internet (on your company's website). Here is how to include an image, knowing the URL at which it can be reached.

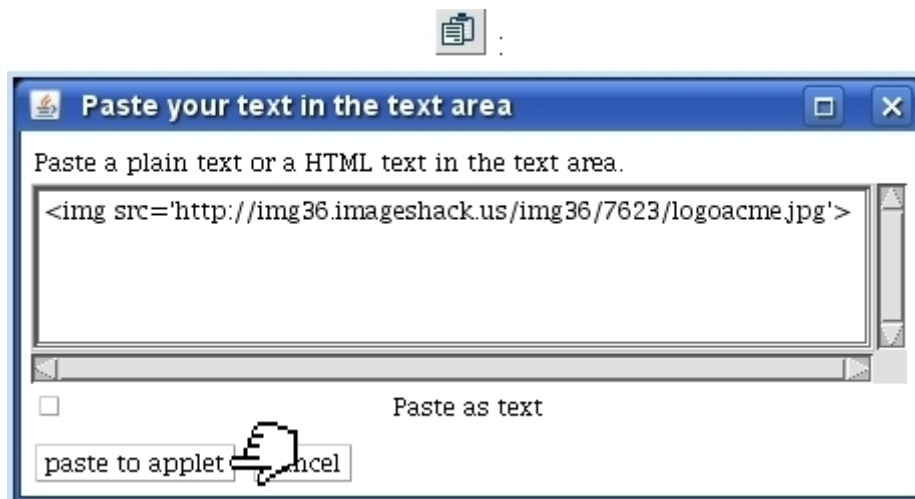



Figure F.2: Including a picture as a link to the web link where it has been uploaded.

Two advantages stem from this way of doing :

- generated emails then basically contain only text, therefore are quicker to send ;
- contrary to a physical include via , picture shows immediately when composing the document, which thus gives a better preview.

### F.5.2 Using templates

To quicken creation of your documents, it is useful to have one or several templates ready. The following shows a guideline about how to do this in an efficient way.

### F.5.2.1 Creating a "Email Templates" folder and creating templates

Through the File Manager (7.4.1.1), first create a "Email Templates" folder under folder /CRM (Fig.F.3).

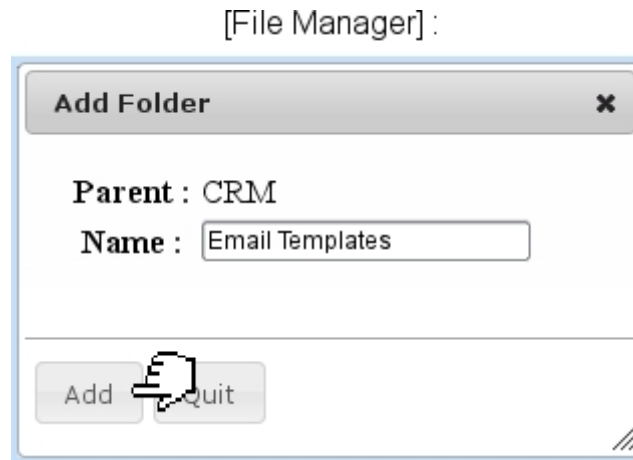


Figure F.3: Creating a dedicated folder to keep in templates of documents.

Then, as displayed for instance on Fig.F.4, a template is created, including the following :

- a system of tables to which include data in the future ;
- constant things such as a company logo, an introduction and an instruction to sign off the newsletter.

In that example, the logo image has been added more conveniently as an HTML link, as described at F.5.1.

### F.5.2.2 Opening templates

When a newsletter is needed to be sent, a template can now be opened through **Select model** instead of being created from scratch through **New model** . As shown on Fig.F.5, one must be careful to save it under a new name, for instance in a created /CRM/Newsletters folder.

New model :

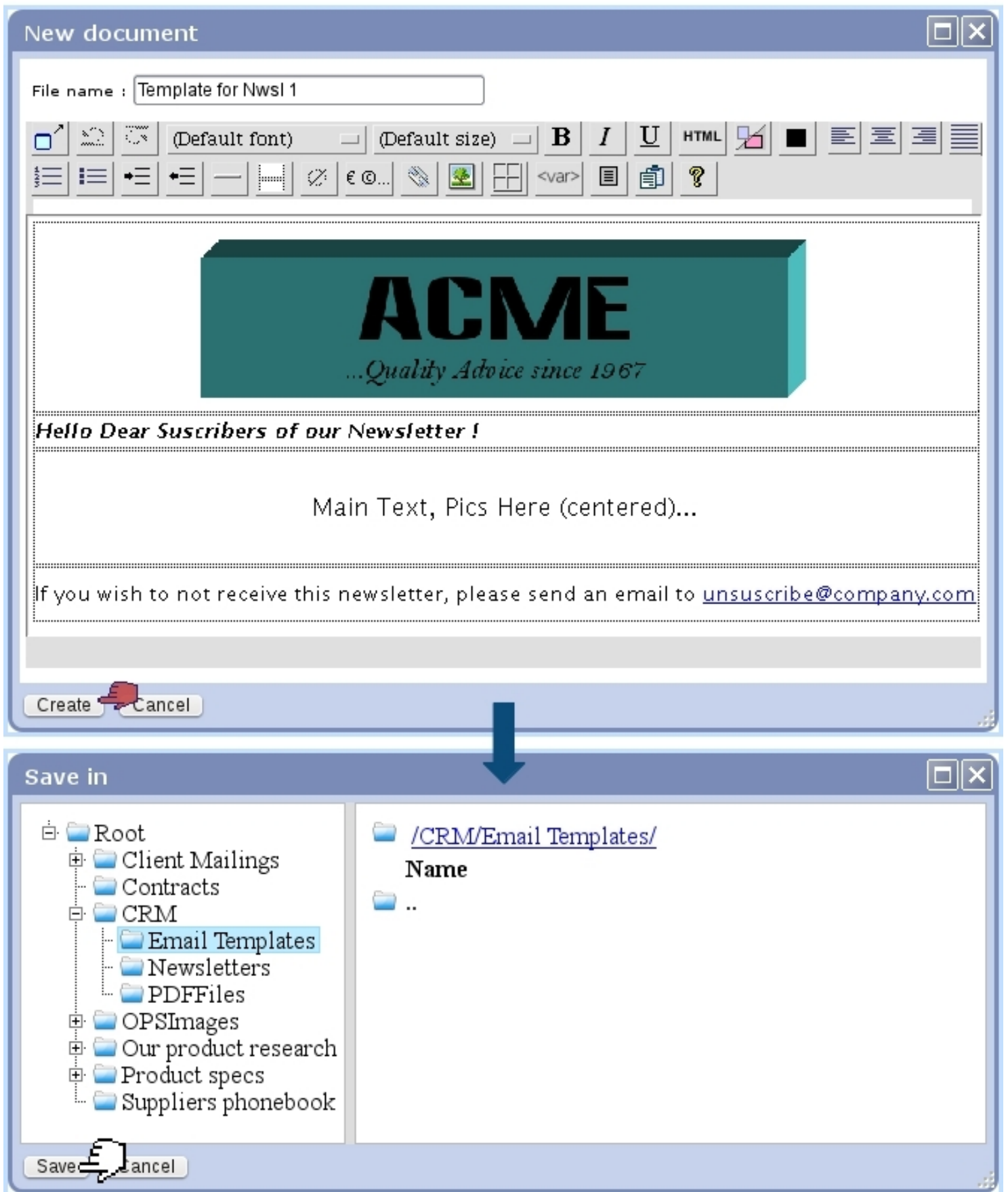


Figure F.4: An example of a template for newsletters, that is to be saved under the folder /CRM/Email Templates.

Select model :

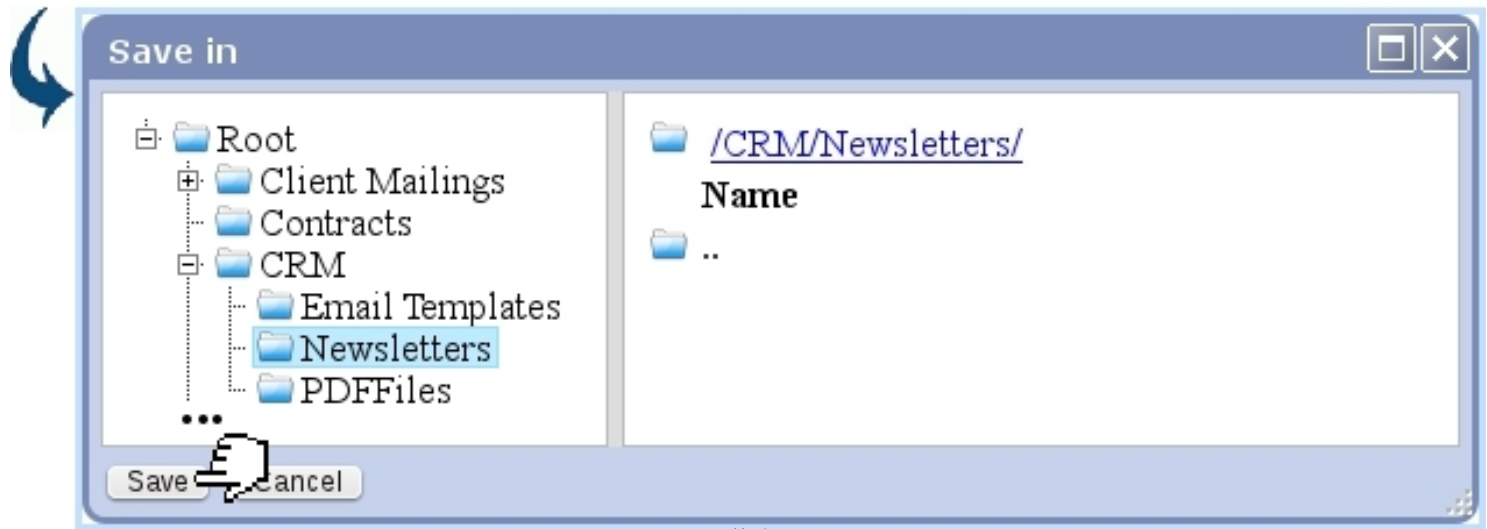
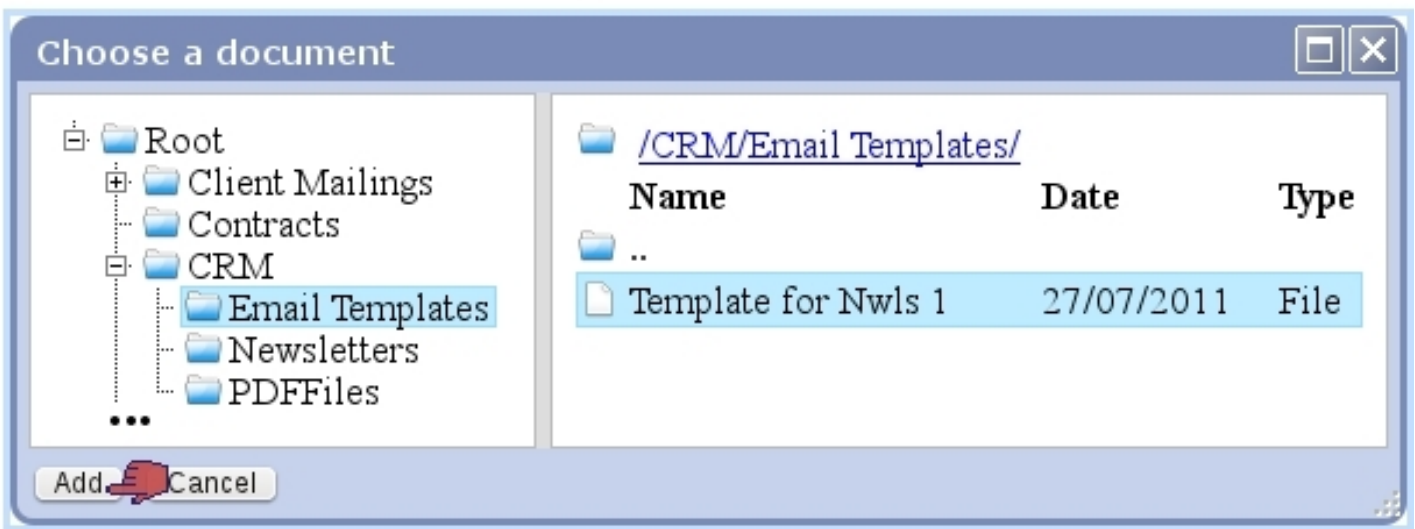


Figure F.5: Opening a previously-made template for an electronic newsletter and saving it under a new name, in a dedicated folder.