

Sitelok Follow Up Email Plugin



V1.3

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Chapter 1 Introduction

What is the SiteLok Follow Up Email plugin?

The Follow Up Email plugin can automatically send a sequence of emails to users after they join usergroups (like an auto responder service). So for example you could set it up so that when users join the SILVER usergroup they are sent a welcome message on day 1, a news email 7 days later and then an upgrade to GOLD offer 30 days after that. You can setup any number of emails in the sequence for each user group as well as a global sequence that is sent to all users. You can also set emails so that they are only sent out if a user is or is not a member of another group. So for the upgrade to GOLD message in our example we could choose to only send that if the user has not already upgraded to GOLD.

If you use Linklok to sell downloads then you can easily use this plugin to create product related email sequences.

This plugin requires the use of CRON on your server to be able to perform tasks at specific times. You should check with your hosting provider that CRON is supported and for details about how to set it up. You can also use third part cron services such as SetCronJob (<http://www.setcronjob.com>)

Chapter 2 Installation

Installing for the first time or upgrading

- 1) Extract the contents of the zip file to your PC.
- 2) Copy slcronhandler.php to the slpw folder (overwrite if it exists)
- 3) Upload the plugin_followupemail folder to your existing Sitelok slpw folder using FTP. There are no special permissions required on most servers.
- 4) Login to the Sitelok control panel.
- 5) Open the following URL in the browser

http://www.yoursite.com/slpw/plugin_followupemail/install.php

which will start the installation process. If all is well you will be taken to the plugin preferences page where you will see the plugin listed.

If you have any problems with installation please let us know so that we can help you.

Related plugins that are recommended

We recommend using our Email Unsubscribe plugin so that users can have the option to opt out of receiving emails. You may also find the Amazon SES plugin useful as it allows emails to be sent via SES which provides a high level of reliability and deliverability.

Disabling the Plugin

To disable the Follow Up Email plugin select **Plugin Preferences** in the **Plugin** menu option of Sitelok. Uncheck the enable box for the plugin and click the **Save** button. You can enable it again in the same way.

Uninstalling the plugin

To permanently remove the plugin and its settings follow these steps.

- 1) Disable the plugin as above.
- 2) Click the delete icon next the plugin in the disabled plugins section.
- 3) Confirm the action in the alert box.

If the plugin is uninstalled successfully you will be returned to the plugin preferences page.

Chapter 3 Setting up CRON

Setting up CRON

If you have already setup CRON for another Sitelok plugin you can ignore this chapter.

Normally servers process pages or perform actions when a user visits them but for this plugin we need to have a way for emails to be sent out at specific times in the future. To handle situations like this most servers have a service called CRON which can be used to call a file or page at regular intervals.

How CRON is setup is specific to each server so you may need to ask your hosting provider for help. The basic idea is to have the file `slcronhandler.php` called every 5 minutes so that it can determine if any tasks need to be performed. To get the file path or URL (which one is used depends on your server) open the plugin settings page in the **Plugins** menu and scroll down the page to the **CRON Settings** section.

CRON settings

Ensure that you have CRON setup to call the handler every 5 minutes using the file path or URL below (depending on your server setup). CRON only needs to be setup once for all plugins that use it.

File path
`/home/server1/public_html/slpw/slcronhandler.php auth=c662a1f946a25a308cee70475c568d23`

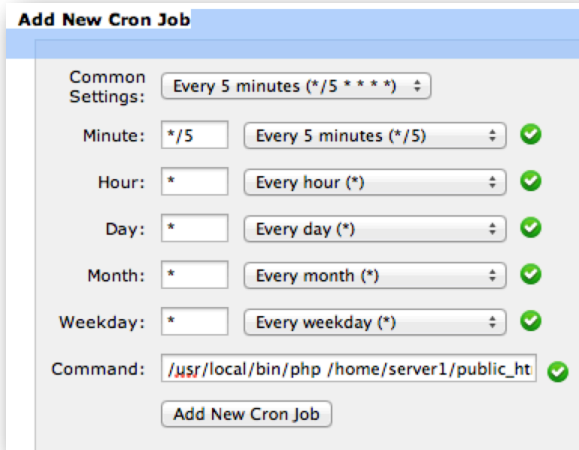
URL
`http://www.yoursite.com/slpw/slcronhandler.php?auth=c662a1f946a25a308cee70475c568d23`

Example CRON setup using cPanel

If your hosting uses the popular cPanel control panel then you can usually setup CRON as follows.

- 1) Login to cPanel and click the **Cron Jobs** icon.
- 2) In the **minutes** field enter `*/5`
- 3) In the **hour**, **day**, **month** and **weekday** fields enter `*`
- 4) In the **command** field enter `/usr/local/bin/php` followed by a **space** and then the **file path** from the plugin page.

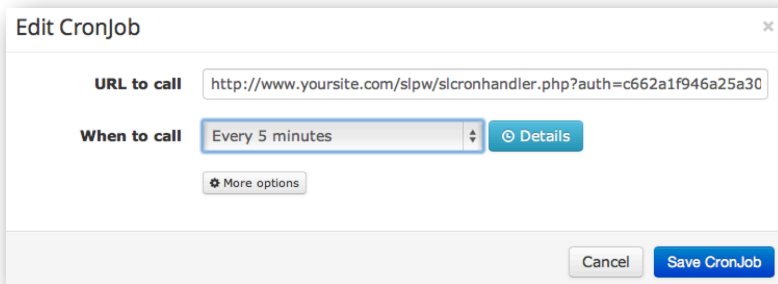
It should look something like this



Click **Add New Cron Job** to enable it.

Using a third party CRON service

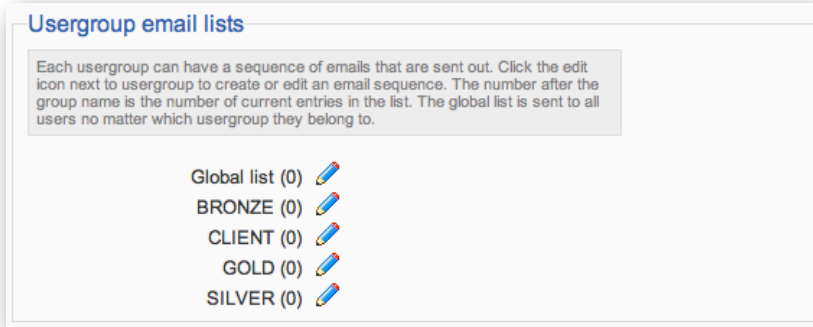
If your hosting provider doesn't support CRON there are a number of third party services that can simulate CRON calls. Sitelok should work fine with these systems. For example SetCronJob (<http://www.setcronjob.com>) allows you to enter a URL to be called at a fixed period. For use with Sitelok their Silver plan (currently \$10 per year) should be ideal. Just set the **URL to call** to the URL provided on the plugin page and set **When to call** to 5 minutes




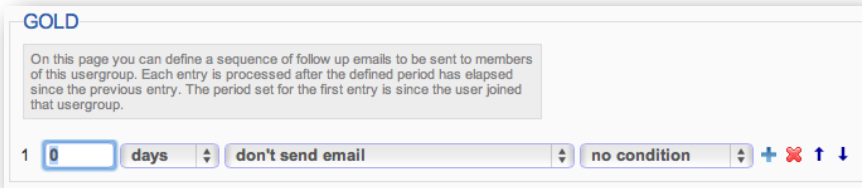
Chapter 4 Settings

Email sequences

Click the **Follow Up Email** option in the **Plugins** menu to display the settings.



In the first section you will see a list of the usergroups you have defined. To create an email sequence list just click the  icon to display the email list page for the usergroup.



To setup your first email enter the period of time since joining the usergroup the email should be sent, the template to send and any condition based on them belonging or not belonging to another usergroup.

To add the next email in the sequence click the **+** icon. The time period you enter is the time since the last entry in the sequence was processed (even if no email was sent).

You can add as many entries as you need.

Remember to click the **Save** button to save any changes to the list.

Important Users will only trigger the email sequence when they join the related group (or create an account for the global group). Users that are already a member of a usergroup when you install the plugin will not get the email sequence. If you wish existing members to start the sequence as if they just joined you can adjust their sequence position as described later.

Also be careful if you import users into Sitelok as they will start to receive the appropriate email sequence. To stop a large number of emails being sent out at the same time its best to handle large imports of users in batches over several days.

Inserting an entry

If you need to insert an entry between two others then click **+** on the entry above where you want to insert. Remember to click the **Save** button to save any changes to the list.

Beware that inserting an entry to an existing list has an impact on users already part way through the sequence. To solve this Sitelok will attempt to adjust each affected users email count to handle inserted emails unless you choose to handle this manually (see Auto Adjust).

Deleting an entry

To delete an entry click the **✖** icon next to the entry. If the entry is the only one then the sequence will be considered empty. Remember to click the **Save** button to save any changes to the list.

Beware that deleting an entry in an existing list can have an impact on users already part way through the sequence. To solve this Sitelok will attempt to adjust each affected users email count to handle deleted emails unless you choose to handle this manually (see Auto Adjust).

Reordering entries

You can use the **↑ ↓** icons to move entries up and down the list. Remember to click the **Save** button to save any changes.


Beware that moving an entry in an existing list can have an impact on users already part way through the sequence as their position will remain the same.

Auto Adjust

Inserting or deleting entries in an existing sequence can have an impact on users already part way through the sequence.

For example if you insert a new email between email1 and email2 then the existing email2 will become email3. Users who have just been sent email2 would receive it again (as email3).

To solve this Sitelok will attempt to adjust each affected users email count to handle the changes.


If you prefer to manually adjust users positions in a sequence when you adjust a list then just uncheck the **Auto Adjust** checkbox before saving the changes. You can then either adjust users individually by clicking the  icon next to the user on the main admin page or use the **Adjust Sequence Position** tool on the plugin settings page to handle multiple users (see later).

We noticed that at least one of the big name auto responder subscription services doesn't automatically handle changes to the email sequence and expects users to manually adjust each members count individually. There isn't even an option to adjust multiple users (there maybe 1000's) so they suggest calling them up so they can do that for you!!!

Auto Sequence Position

For each Sitelok user we store the list sequence position they are at for each usergroup email list. There maybe occasions when you want to adjust this for one or more users.

Adjust for an individual user

To adjust the position for an individual user click the  icon next to the user on the main admin page.

Current sequence count for follow up email lists

Here you can view and edit the users current position in each email list. The value is the last entry processed. Setting to 0 would start the list sequence and setting to -1 would disable the list for this user. The number in brackets is the number of current entries in the list.

GOLD (6)	<input type="text" value="0"/>
SILVER (4)	<input type="text" value="2"/>

Here you can set the position count for each usergroup list (and global list if used). The position refers to the last entry processed. Setting 0 will cause the user to start the list again. Setting to the last entry in the list will leave the user waiting until you add a new entry. Setting -1 will disable the user from receiving emails from the list.

Adjusting for multiple users

To make it easier to adjust the list sequence position for multiple users we have provided a tool on the plugin settings page.

Adjust sequence position

If required you can adjust users current position (count) in an email sequence. You can do this per list for all users, selected users or users with a certain current position. The position (count) stored indicates the last entry in the list that was processed. Position 0 means the user will start from the first entry in the list. Position -1 disables the list for the user. This is an advanced feature so please make sure you understand what you are doing before using it.

Adjust these users

For usergroup list

Adjustment

Only those with position

Using this tool you can adjust users position count.

- Adjust these users** Select all to adjust all users for the select usergroup or selected to adjust only users currently selected.
- For usergroup list** Select the list position count to adjust
- Adjustment** You can set the position to a fixed count or increment/decrement the existing count.
- Only those with position** Here you can add a condition for thw adjustment. For example you may want to only increment users at position 2 (use =) or 3 or higher (use >=) or 5 or lower (use <=).

Be very careful when using this tool.

Chapter 5 Related Topics

There are many ways to use the plugin but here are some ideas and tips.

Mailing lists

Primarily Sitelok is a membership system but it can be used to handle mailing lists as well by creating usergroups that are for mailing list access only. So for example you could add a registration form to your site that collects a name, email address (and any other details) and then adds the user to a usergroup used as a mailing list. The usergroup doesn't necessarily need to be used for any site content.

There is one issue when using a registration form in this way. If a user visits your site and signs up to your mailing list and then returns and tries to register for membership (or signup for a different mailing list) then the registration form will report that the email has already been used. This is necessary as it wouldn't be secure to allow the updating of a Sitelok account in this way.

The issue described above doesn't apply if the user uses a payment plugin (like Paypal or 2CO) to get membership as it can update the existing account if you select the option to search for an existing email.

The best way to handle this situation is to issue a password during the initial signup to your mailing list. This can be used to access an update profile form where the user can update their details and also add or remove themselves from mailing lists (usergroups) if you offer more than one. See the 'User Profile Page' chapter of the main Sitelok manual for details about adding and removing usergroups. Of course you should make sure mailing list only usergroups only provide access to this update form and not your members only content.

Email unsubscribe

You should always provide a way for users to unsubscribe to emails. We recommend installing the Email Unsubscribe plugin for Sitelok as this provides an easy way for users to block all emails if they don't want them. This is a one click link in the email and doesn't require the user to login. Such an unsubscribe link is important as it allows users to stop all emails but you may also like to provide users a less drastic way to add or remove

themselves from specific mailing list usergroups as well. You can do this using the update profile form as mentioned earlier.

Double opt-in

It is generally accepted that when users signup or pay for membership that they may be sent emails associated with the membership. However it is important to ensure the email account is actually owned by the user before you start sending emails to the address. For example the email template sent to the user during registration could contain a confirmation link that the user clicks to enable a Sitelok account which proves they have access to the email account. This would use the [!!!approve\(\)!!!](#) link. Other options include using links in the email that allow the user to add or remove themselves from specific usergroups such as [!!!removegroup\(\)!!!](#). See the main Sitelok manual for more details.

The Email Unsubscribe plugin also has an opt-in link option.

Amazon SES

Most hosting servers have limitations in place for sending emails. Also emails sent from hosting servers (especially shared hosting) are more likely to be spam filtered on the client side. One service that is worth checking if you send a lot of email is Amazon SES - <http://aws.amazon.com/ses/>

This service allows you to send bulk email cheaply and reliably. We have a plugin that can route Sitelok email via Amazon SES and can also flag user accounts which are getting bounces or complaints. When combined with the email unsubscribe plugin those accounts can be automatically blocked from being sent further emails too.

Providing extra time based content

You can use follow up emails to provide a simple time based content system. For example when a user registers or pays you could initially add them to the BRONZE usergroup. In a follow up email set to go out 30 days after joining you could provide a link which adds them to the SILVER usergroup. After another period of time you could use the next follow up email to add them to the GOLD usergroup.

In a similar way you could provide extra content to entice a user to click a link to read more. Many scenarios could be setup like this.

Chapter 6 Support

Hopefully if you have followed this manual carefully everything will be working fine. However sometimes things don't go quite so smoothly so if you have any questions or problems then please check the FAQ on the support page or email us.

Support area: <http://www.vibralogix.com/support/>

Email: support@vibralogix.com