



**ProSystem *fx* Site
Builder**

eNewsletters

December 2011

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eNEWSLETTERS

Your clients can subscribe to eNewsletters to keep up to date on state and federal tax alerts, tax briefings using your firm's and CCH's newsletters, and any events you have configured on your website. An example of the eNewsletter your clients will receive is shown below.

You only need to configure two items to set up your eNewsletters: the email header and the default message. Once you complete setup, no further maintenance is necessary. You can customize the header for your firm with either text or an image. You can customize the default message with tags that automatically update any dates or names for each client. See *Configuring eNewsletter Options* on page 3 for more information. Additionally, you can edit the current month's eNewsletter. See *Managing the Current eNewsletter* on page 5 for more information.

The screenshot displays an email header for "Sample CPA" with the address "34 Main Street, Your Town, USA". The header includes navigation links: Home, Firm Profile, Client Services, Info Center, Newsletters, Financial Tools, Links, and Contact Us. The main content is divided into three columns. The left column contains "Tax Alerts" (links for Tax Alert 1-6), "Tax Briefings" (links for Tax Briefing 1-4), and "Tax Calendar Events" (Calendar Event 1-3). The middle column features a "Default Message" box with a personalized greeting "Dear John Doe," and a message about a "Current Month 2011" update. Below this is a "Newsletters" section with a link to "Sample CPA Custom Newsletter" and a placeholder text "The synopsis from your custom newsletter displays here." The right column lists "CCH Newsletter 1" through "CCH Newsletter 5" with their respective synopsis placeholders. At the bottom, there is an unsubscribe link: "If you do not wish to receive emails, please [unsubscribe](#)."

In addition to the header and default message, eNewsletters display six articles, which can include CCH created articles, or custom articles created by your firm. CCH editors create five to seven articles each month to use in Newsletters on your website and eNewsletters you send via email. You can also create your own custom articles. See *Creating Custom Newsletters* on page 4 for more information on creating your own articles.

The articles that display in your eNewsletters are determined by the content selections you make on the Newsletter Options page. The first six articles you select to display on your website also display in your eNewsletter. Your custom articles may or may not display in your eNewsletters depending on the location you select on the **Newsletter > Newsletter Options** page. If you select to display custom articles on the bottom of the list, and there are six or more CCH articles selected from the current newsletters or the newsletter library, your custom articles will not be included in the eNewsletter. The article order is as follows:

1. Custom newsletters (if selected to display at the top on the **Newsletter > Newsletter Options** page)
2. Monthly newsletters
3. Custom newsletters (if selected to display at the bottom on the **Newsletter > Newsletter Options** page)
4. Library newsletters

eNewsletter Process Overview

After setting up your eNewsletters, they will automatically populate every month without any maintenance needed from you.

To create your eNewsletters, do the following:

1. Enable eNewsletters so your clients can sign up to receive them. See *Enabling eNewsletters* on page 2 for more information.
2. Create the email header. See *Configuring the eNewsletter Email Header* on page 3 for more information.
3. Create the default eNewsletter message. See *Configuring the eNewsletter Default Message* on page 4 for more information.
4. Enter a distribution date and the subject line for the eNewsletter. See *Managing the Current eNewsletter* on page 5 for more information.
5. Save your changes.

Once you complete these steps, you do not need to return to the eNewsletter setup. Your eNewsletters will automatically generate and distribute each month. However, if you want to personalize the eNewsletter body text or change the distribution day each month, you can do so.

Enabling eNewsletters

To enable eNewsletters, do the following:

1. Log in to your Site Builder account.
2. Click **Modules > eNewsletters** on the toolbar.
3. Click **Yes** to the question *Would you like Newsletters to be sent to your clients?*

4. Click **Yes** to the question *Do you want eNewsletters opt-in displayed on the home page?* to allow your clients to sign up for eNewsletters. If you select **No**, your clients will not be able to sign up to receive your eNewsletters.



Note: A custom signup form can be created for you by CCH. Contact Site Builder support at (877) 393-2874, option 1, for more information.

5. Click **Accept**.
6. Click **Site Design > Publish** on the toolbar.

Configuring eNewsletter Options

You customize the eNewsletter header and default message for your firm's eNewsletters. The header can be an image or text. For example, you may want to recreate your firm's letterhead.

The eNewsletter default message should contain a default greeting for your clients. The date can be automatically updated by using a content tag. See *Using Content Tags* on page 5 for information on content tags.

After you set up and save your header and default message, click **Current eNewsletter** in the navigation panel to preview.



Important: If you make any changes to the current eNewsletter, and then update items on the Options page, your changes to the current eNewsletter will be lost.

Configuring the eNewsletter Email Header

To configure your eNewsletter options, do the following:

1. Log in to your Site Builder account.
2. Click **Modules > eNewsletters** on the toolbar.
3. Click **Go to eNewsletters Site**.



Note: This option is only available after you select **Yes** to the question *Would you like Newsletters to be sent to your clients?*, and then republish your site.

4. Click **Options** on the navigation panel.
5. Enter the email header in the Email Header section. You can also enter content tags for text that should be automatically updated. See *Using Content Tags* on page 5 for information on content tags.
6. Format the text as needed. See *Formatting Text* on page 6 for more information on formatting the text.




Note: To preview your eNewsletter, click **Send Test Mail**, enter your email address, and then click **OK**. The firm contact email address displays by default. In a few minutes, you will receive a sample eNewsletter in your inbox.

7. Click **Save Changes**.


Configuring the eNewsletter Default Message

To configure your eNewsletter default message, do the following:

1. Log in to your Site Builder account.
2. Click **Modules > eNewsletters** on the toolbar.
3. Click **Go to eNewsletters Site**.

 **Note:** This option is only available after you select **Yes** to the question *Would you like Newsletters to be sent to your clients?*, and then republish your site.

4. Click **Options** on the navigation panel.
5. Enter the default message in the eNewsletter Default Message section. You can also enter content tags for text that should be automatically updated. See *Using Content Tags* on page 5 for information on content tags.
6. Format the text as needed. See *Formatting Text* on page 6 for more information on formatting the text.

 **Note:** To preview your eNewsletter, click **Send Test Mail**, enter your email address, and then click **OK**. The firm contact email address displays by default. In a few minutes, you will receive a sample eNewsletter in your inbox.

7. Click **Save Changes**.

Creating Custom Newsletters


Your firm can create a personalized newsletter, or article, to display on your site and in your eNewsletters. eNewsletters displays six articles, and if you configure your custom newsletter to display first on your website, it will be included in the eNewsletter.

To create a custom newsletter, do the following:


1. Log in to your Site Builder account.
2. Click **Newsletter > Custom Newsletters** in the toolbar.
3. Click **Add a New Article**.
4. Enter the article title.
5. Enter a summary of the article in the Synopsis area. The synopsis will display on your website or in your eNewsletter.
6. Enter the article text in the Article Detail area. The article text will not display on your website or in your eNewsletter. The client must click on the article title to view the full article.
7. Format the text, if needed. For more information on using the formatting tools, see *Formatting Text* on page 6.
8. Click **Save**. You are returned to the Custom Newsletters page, and your new article is now selected. This article will now appear in on your website and in your eNewsletters, depending on the options you selected.

Managing the Current eNewsletter


On the Current eNewsletter page, you can view and update the date the eNewsletter is scheduled to be distributed to your clients.


 **Note:** This page is populated on the fifth of the month with new articles and tax alerts. If you go to this page between the date you send your eNewsletter to the 5th of the month, this page will be blank.

If necessary, you can also edit the current month's eNewsletter content before it goes to your clients. If you consistently make changes to the header or default text of the current eNewsletter, you may want to consider making changes on the Options page. See *Configuring eNewsletter Options* on page 3 for more information.

 **Important:** If you make changes to the current eNewsletter, and then update items on the Options page, your changes to the current eNewsletter will be lost.

To view or edit the current eNewsletter, do the following:

1. Log in to your Site Builder account.
2. Click **Modules > eNewsletters** on the toolbar.
3. Click **Go to eNewsletters Site**.
 **Note:** This option is only available after you select **Yes** to the question *Would you like Newsletters to be sent to your clients?*, and then republish your site.
4. Click **Current eNewsletter** on the navigation panel.
5. Enter or edit the date scheduled, if necessary. This is the date the eNewsletter will be sent to your clients.
6. Edit the eNewsletter, if necessary. You can also enter content tags for text you do not want to update for each client. See *Using Content Tags* on page 5 for information on content tags.
7. Format the text as needed. See *Formatting Text* on page 6 for more information on formatting the text.

 **Note:** To preview your eNewsletter, click **Send Test Mail**, enter your email address, and then click **OK**. The firm contact email address displays by default. In a few minutes, you will receive a sample eNewsletter in your inbox.

8. Click **Save Changes**.


Using Content Tags

Content tags are placeholders for specific types of content. Content tags are replaced by appropriate content when the eNewsletter is generated, such as your company name or the current month and year.

You can format content tags, for example, by making them bold or italic. See *Formatting Text* on page 6 for information on formatting text in an eNewsletter.


To insert a content tag, do the following:

1. Log in to your Site Builder account.
2. Click **Modules > eNewsletters** on the toolbar.
3. Click **Go to eNewsletters Site**.

 **Note:** This option is only available after you select **Yes** to the question *Would you like Newsletters to be sent to your clients?*, and then republish your site.

4. On the navigation panel, select one of the following:
 - ◆ Click **Options** to add a tag to the current and all future eNewsletters.
 - ◆ Click **Current eNewsletter** to add a tag to the current eNewsletter only.
5. Place your cursor in the text where you would like to insert the tag, and then enter one of the following:


Tag	Replaced by...
{Name}	The client's name as it was entered when the client subscribed to the eNewsletter
{Company Name}	Your firm's name
{Website}	Your firm's website address
{Month}	The current month
{Year}	The current year
{Unsubscribe Link}	A link for your client to click to unsubscribe from your eNewsletter

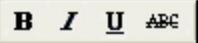

 **Important:** Tags are case-sensitive. If you enter {company name} instead of {Company Name}, the user will see {company name} in their eNewsletter instead of your company name.

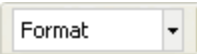
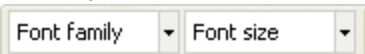






6. Click **Save Changes**.









Formatting Text


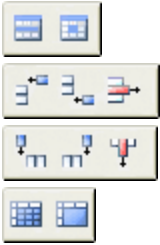


There are several formatting tools available. Review the following for instructions on how to use the formatting tools.




 **Note:** You can also apply formatting to content tags. See *Using Content Tags* on page 5 for information on inserting content tags.

Button	Description
B I U ABC 	Select text in the editor and click one or more of these buttons to format the text with those attributes.
Alignment 	Select text in the editor and click an alignment button to align all of the content to the left, center, right, or fully justified.

Button	Description
Format 	Select one of the style formats from the list to format the text in the editor using that predefined style.
Font style and size 	Select text in the editor, and then select a font family and font size to apply to the selected text.
Find, Find/Replace 	Click one of these options to search the text in the text editor, and if necessary, replace it.
Bulleted list, numbered list 	Click a list button to insert either a bulleted or numbered list.
Undo, redo 	Click undo to undo the last action, or click redo to redo the action.
Hyperlink 	<p>Select text and click Hyperlink to insert a hyperlink to a website, or select a hyperlink and click Unlink to remove the hyperlink. The following are some types of information you may want to enter:</p> <ul style="list-style-type: none"> ■ Link URL. When inserting a hyperlink, there are several options on multiple tabs, but the only required entry is the Link URL, where you enter the website address. If you are linking to an item on your firm's website, you can click Browse  to locate the site or file to link to. ■ Anchor. If you have inserted an anchor (see below), you can select to link to that anchor. ■ Title. Enter a title for the hyperlink, which can be a description of the link or the URL address. Titles display when your client hovers over the hyperlink. They also make your text compatible with screen-readers. <p>Click Insert after making your selections.</p>
Anchor 	<p>Anchors allow you to jump to certain points in a page. After you have inserted your anchor, insert a hyperlink to that anchor. See above for instructions.</p> <p>Place your cursor where you would like to insert the anchor, click the Anchor button, and then enter a name for the anchor. Click Insert after making your selections. You can drag an anchor anywhere in the text to move it, if necessary.</p>

Button	Description
<p>Insert/Edit Image</p> 	<p>Place your cursor where you would like to insert an image and click this button. In the Insert/Edit image window, you can select the image and set the image properties. The following are some types of information you may want to enter:</p> <ul style="list-style-type: none"> ■ Image URL. Click Browse  to locate or upload the image to insert. If you have not previously uploaded the image, select the Upload tab on the File Manager window and upload the image. ■ Title. Enter a title for the image, which should be a short description of the image. Titles display when your client hovers over the image. They also make your text compatible with screen-readers. ■ Appearance. Select the Appearance tab to determine the image's alignment, dimensions, margins, and border size in pixels, if necessary. <p>Click Insert when you have finished making your selections.</p>
<p>Cleanup messy code</p> 	<p>Highlight formatted text and click this to clean up any incorrect HTML formatting, such as taking out extra blank lines.</p>
<p>HTML code</p> 	<p>Click to edit the text in HTML code.</p>
<p>Insert date, insert time</p> 	<p>Click either of these buttons to insert the current date or current time into the text. These values are not variables, and will not be automatically updated as the content tags will be.</p>
<p>Preview</p> 	<p>Click to preview the content you are currently editing.</p> <p>Note: Click Send Test Mail to preview the full eNewsletter.</p>
<p>Text or highlight color</p> 	<p>Select text and use one of these options to change the text color, or highlight the text in a selected color.</p>
<p>File Manager</p> 	<p>Click to view any files you have uploaded on the File Manager tab. You can also select the Upload tab to upload a file, up to 100 MB, in one of the following file types: .jpg, .jpeg, .png, .gif, .swf, .flv, .mp3, .mp4, .mov, .avi, .mpg, .qt, .html, .pdf, .ppt, .pptx, .txt, .doc, .docx, .rtf, .xml, .xsl, .xls, .xlsx, .dtd, .zip, .rar, .css, .vcf, .js</p> <p>If you plan to store a large number of files and need to organize them under a new directory, select the New Directory tab.</p>

Button	Description
<p>Insert a table</p> 	<p>Click to insert a new table. The following are some of the fields you should enter for the new table:</p> <ul style="list-style-type: none"> ■ Cols. Enter the number of columns the table should have. ■ Rows. Enter the number of rows the table should have. ■ Cell padding. Enter the number of pixels to insert between the cell wall and the cell contents. ■ Cell spacing. Enter the number of pixels to insert between cells. ■ Alignment. Select whether to align the table cell contents on the left, center, or right. ■ Border. Enter the table border width in pixels. You can select a border color on the Advanced tab. <p>Click Insert when you have finished making your selections.</p>
<p>Table formatting</p> 	<p>Use any of these options to modify a table.</p> <ul style="list-style-type: none"> ■ Table row properties. Change the row to a table header, body, or footer. You can also change the horizontal or vertical alignment. On the Advanced tab, you can change the background image or color for the row. Once you make your selections, you can select to apply the properties to just the current row, all rows in the table, or just the even or odd rows in the table. ■ Table cell properties. Change the cell to a table header or body cell. You can also change the horizontal or vertical alignment. On the Advanced tab, you can change the background image or color for the cell. Once you make your selections, you can select to apply the properties to just the current row, all rows in the table, or just the even or odd rows in the table. ■ Insert row above/below. Place your cursor in the table and click one of these buttons to insert a row above or below the current row. ■ Delete row. Place your cursor in the row to be deleted, and click this button to remove the row. ■ Insert column before/after. Place your cursor in the table and click one of these buttons to insert a column before or after the current column. ■ Delete column. Place your cursor in the column to be deleted, and click this button to remove the column.
<p>Insert rule</p> 	<p>Click to insert a horizontal line where your cursor is currently located in the editor.</p>
<p>Clear formatting</p> 	<p>Select any formatted text and click this button to remove any formatting you have added.</p>


Button	Description
	Click this button to display or hide invisible elements in the editor. Example: A table with transparent borders displays without borders when this button is not selected.
	Select text in the editor and click one of these buttons to change the text to subscript or superscript.
	Click to select a special character to insert.

Reviewing eNewsletter History

You can view the following information for each previously sent eNewsletter: subject line, the date sent, and the number of eNewsletters sent.

To view your eNewsletter history, do the following:

1. Log in to your Site Builder account.
2. Click **Modules > eNewsletters** on the toolbar.
3. Click **Go to eNewsletters Site**.

 **Note:** This option is only available after you select **Yes** to the question *Would you like Newsletters to be sent to your clients?*, and then republish your site.

4. Click **History** on the navigation panel. If necessary, click a column heading to sort by that value.


Managing eNewsletter Subscribers

You can view a list of clients who have subscribed to your eNewsletter on the Subscribers page. From this page, you can also edit or delete a client's subscription, if necessary. Only confirmed subscribers will receive eNewsletters.

To allow clients to subscribe to your eNewsletters, you must select **Yes** to the question *Do you want eNewsletters opt-in displayed on the home page?* on the **Modules > eNewsletters** page. See *Enabling eNewsletters* on page 2 for more information.



To view a list of your eNewsletter subscribers, do the following:


1. Log in to your Site Builder account.
2. Click **Modules > eNewsletters** on the toolbar.
3. Click **Go to eNewsletters Site**.

 **Note:** This option is only available after you select **Yes** to the question *Would you like Newsletters to be sent to your clients?*, and then republish your site.

4. Click **Subscribers** on the navigation panel. If needed, click a column heading to sort by that value.

5. If necessary, do one of the following:

- ◆ Click the **Edit** button  next to a client's name to edit the subscription.
- ◆ Click the **Delete** button  next to a client's name to remove the subscription.

 **Note:** You can also click **Find** at the top of the page to search your subscribers by their status, email address, or name. After completing a search, click **View All** to clear the search results.