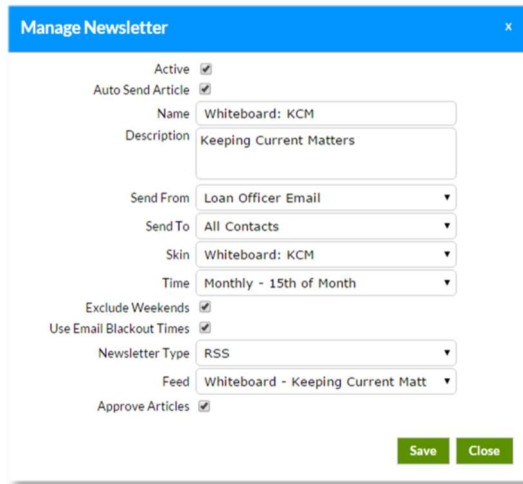


Newsletter: Configuration Settings

(Created: 11.10.2015 / Modified: 7.15.2016)



Whiteboard Location: Marketing Center => Newsletters

- **Active:** Enables/Disables the selected Newsletter
- **Auto Send Article:** Enables/Disables the auto-assignment of articles, via published date, to the available delivery time slot.
- **Name:** Provide your Newsletter with a general name.
NOTE: The Newsletter name does not control subject line of the email.
- **Description:** If you need a more detailed description of your Newsletter, please enter that information here.
- **Send From:** Sets the deliverer of the Newsletter.
 - Default Loan Officer Email
 - Default Team Email
 - All Managed by Team Settings => Team Settings tab
- **Sent To:** Designates the recipient of the Newsletter
 - All Contacts – Sends to both Clients and Partners

- All Clients – Sends to Clients only (all types)
- All Partners – All Partners (ownership used)
- Mortgages – Select all on one Pipeline type
- Groups – May only select one Team defined group
- **Skin:** Assigns the skin to all articles for your custom “look”.
- **Time:** Defines article delivery schedule.
- **Exclude Weekends:** Excludes weekend delivery.
- **Use Email Blackout Times:** Defined by a team’s “blackout time” settings.
- **Newsletter Type:** Defines the Newsletter type
 - RSS – Rich Site Summary – Syndicated web content generated by 3rd party entities and are generally free to access. However, some might require site memberships to access this data.
 - Create new RSS feeds by using the Feeds tab in Newsletters.
 - Manual – Allows users the ability to create and manage their own articles
- **Feed:** Provides the ability for users to add their own RSS Feeds.
NOTE: Not all feeds will be compatible
- **Approve Articles:** Allows the users to approve/disapprove articles before they are linked to their designated delivery time.

Pro Tips

- ✓ Use Whiteboard’s integrated Newsletter with Keeping Current Matters® (KCM). It’s free to Whiteboard licensees and they provide phenomenal articles.
- ✓ Set it –then forget it. Let KCM supply great content and let Whiteboard manage delivery. You’ve got enough to manage as it is!
- ✓ Whiteboard will remind you when Newsletter is out of articles -or when feeds are used, when new articles need approval.