Introduction

- System overview
- Case studies
- About this manual
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System overview

Welcome to the phpList Manual!

This first chapter will explain what phpList is used for and give you a basic overview of how it works.

What is phpList?

phpList is used for sending email newsletters, announcements and notifications. It is designed to send a single message (a **campaign**), by email to large numbers of recipients (**subscribers**).

You organize your subscribers into **lists** and you can import email addresses from your email account, online shop, blog or database. You can also import **attribute** data, for example, subscriber name, city or shoe size.

Campaigns are composed in a web interface and can be **personalized** for each subscriber. Personalization is done with the use of placeholders which display attribute data within the text of the emails, as well as unique links that **allow subscribers to join or leave** lists easily. You can use plain text, HTML and templates.

Once a campaign has been sent, phpList will show **statistics** about it. This will include **opens/views** (who read the campaign), **clicks** (who clicked which link in the campaign) and **bounces** (which addresses were incorrect and delivery failed). Bounced mails and unsubscribes are automatically removed from the system, which will benefit future **delivery of campaigns**.

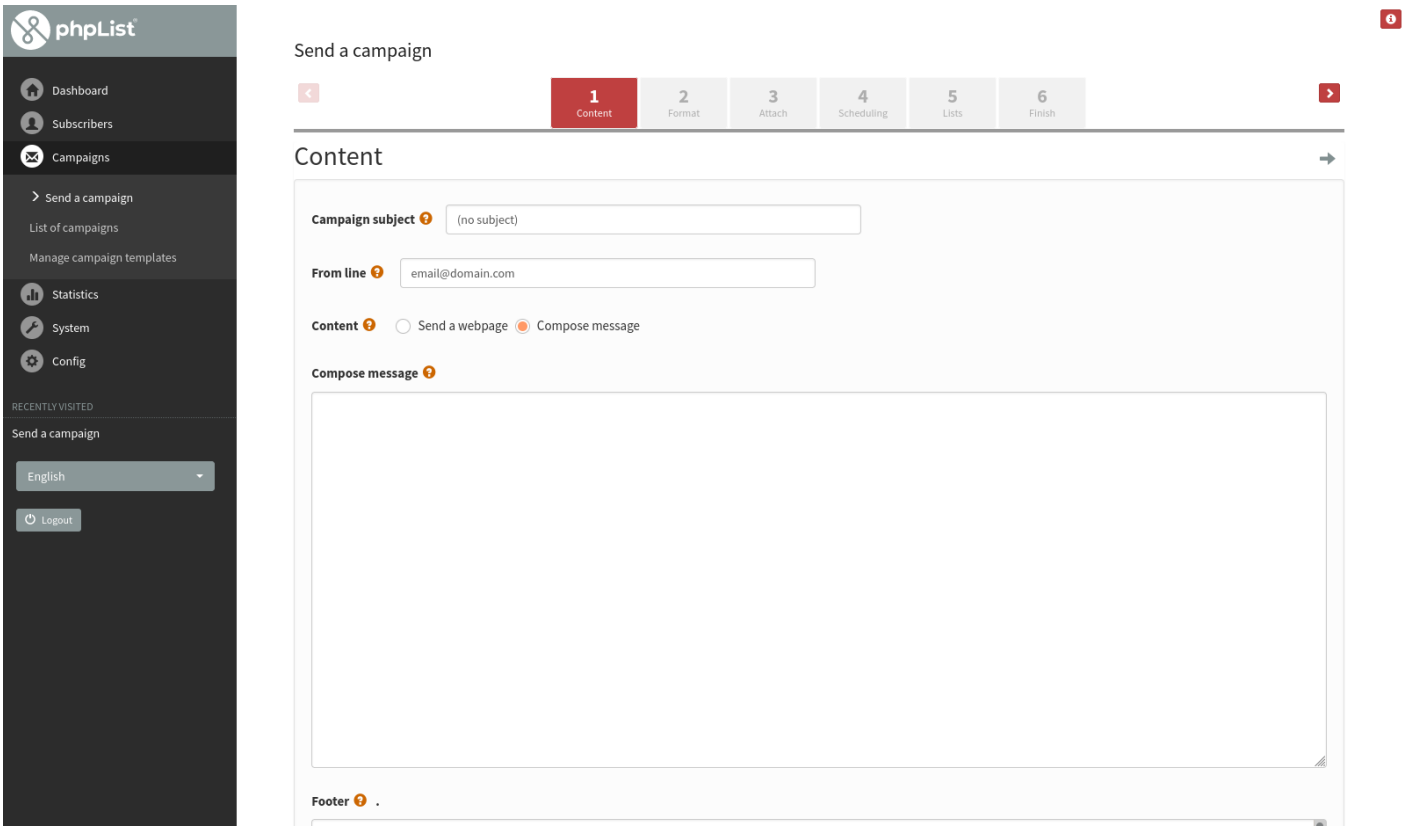
phpList is Open Source software and it is published under the AGPLv3 license. You can install and host phpList on your own servers or you can use it via the phpList Hosted service.

A quick tour of phpList

phpList has an attractive web interface and a wealth of features to explore.

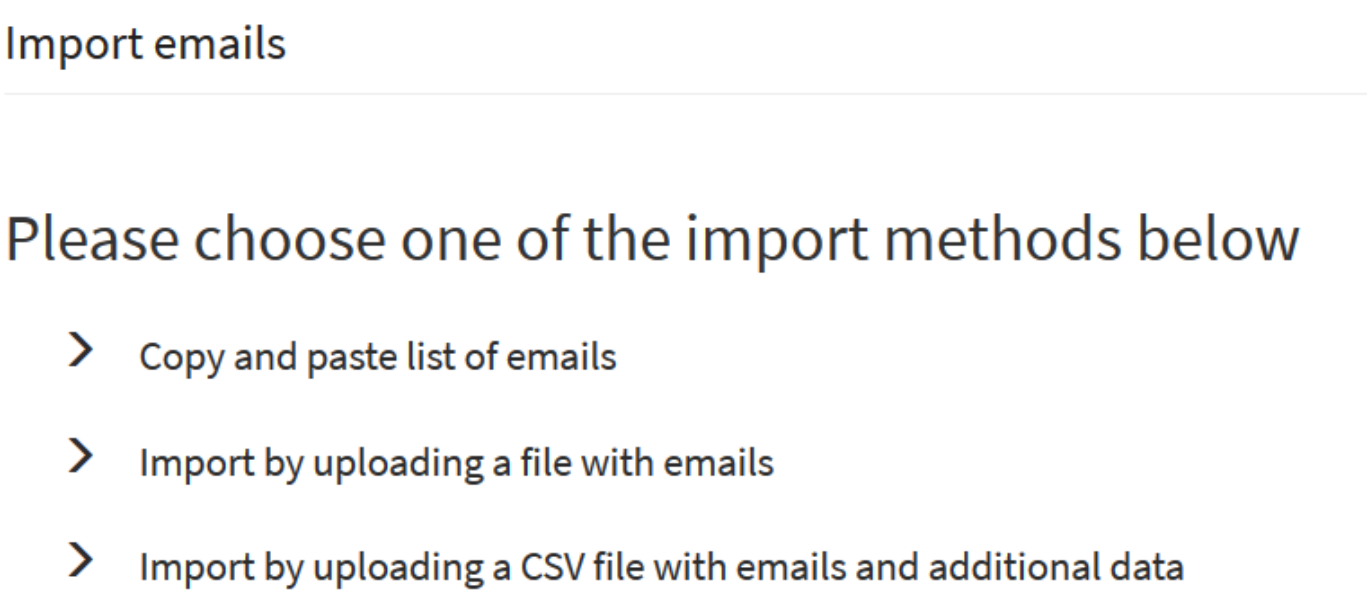
Campaigns

Composing and sending campaigns is achieved by following a step by step process.

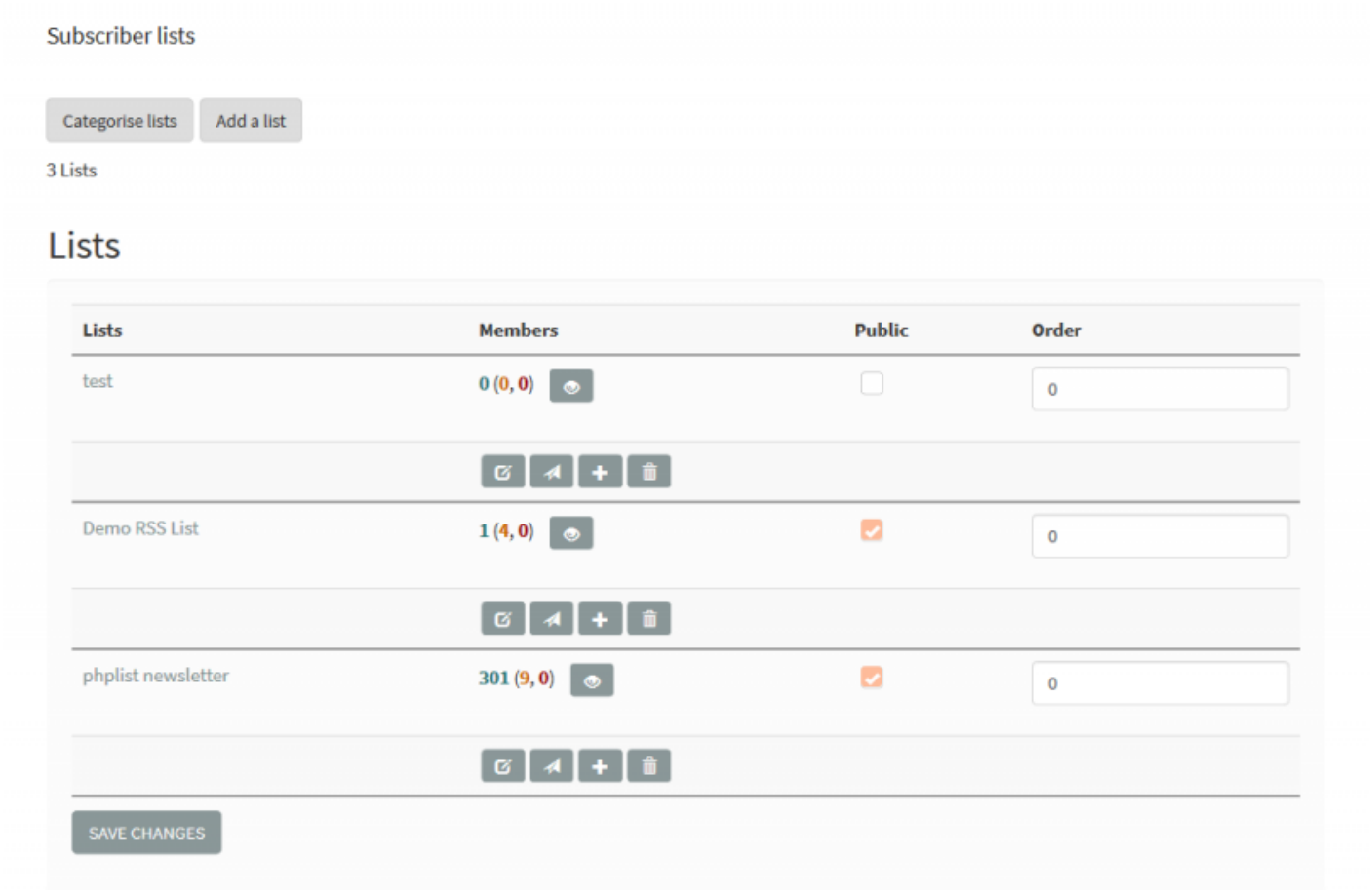


Subscribers

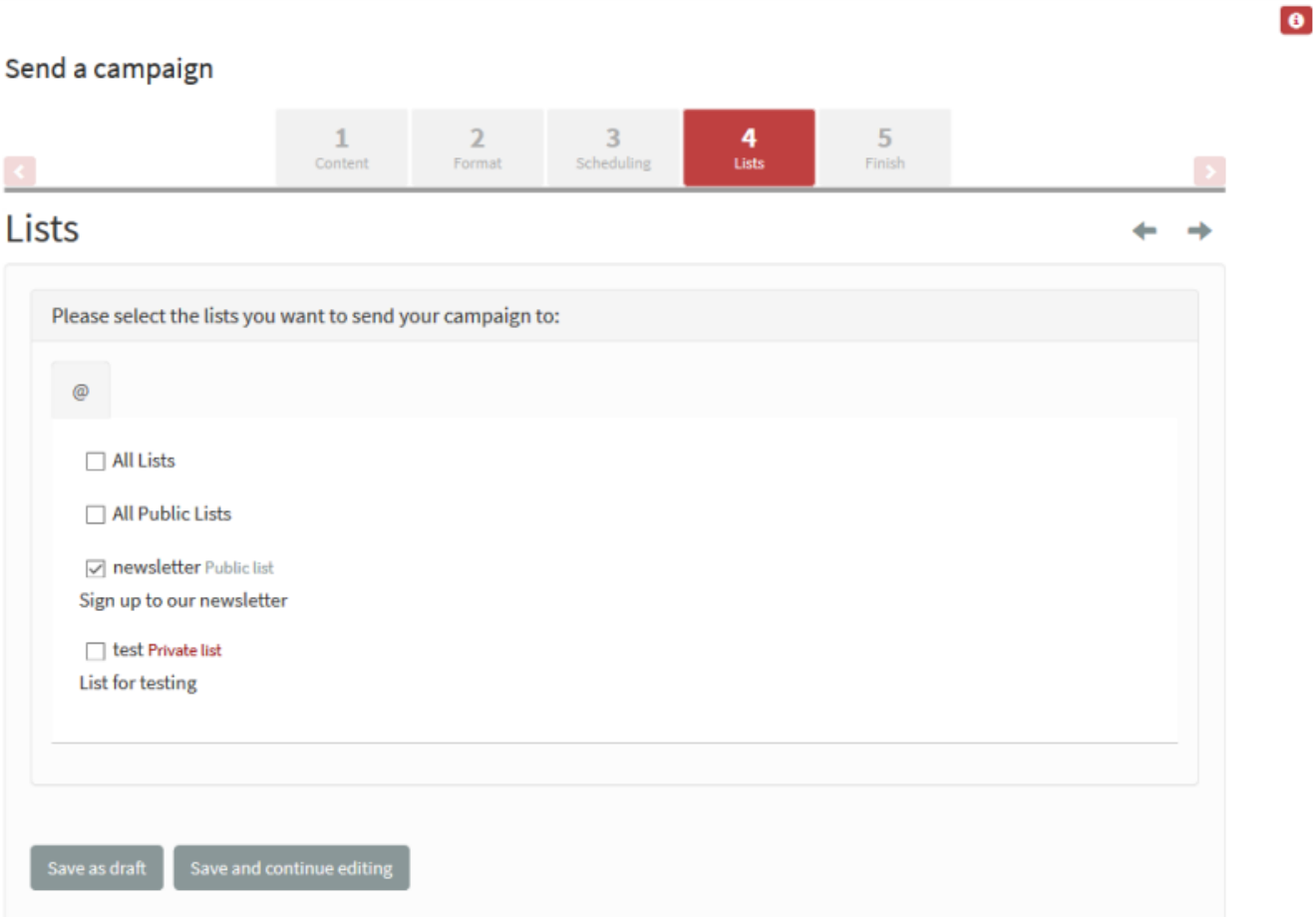
In phpList you upload your contacts once and the information is ready to use every time you send a campaign.



You can group subscribers into one or more lists

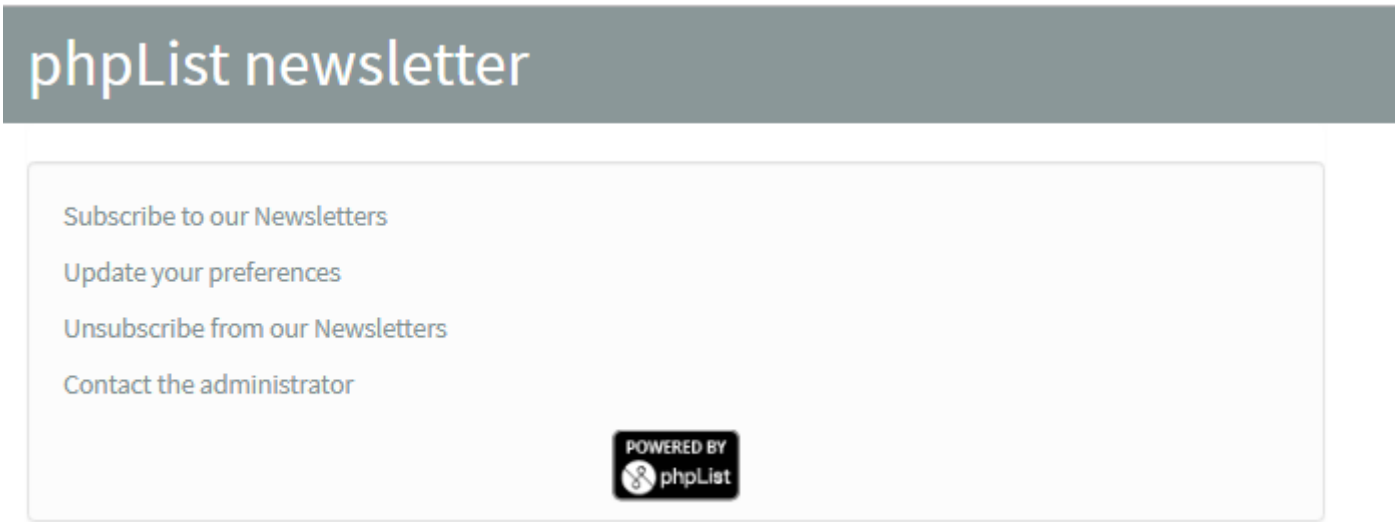


Simply choose which list you want to send to when you create your campaign.

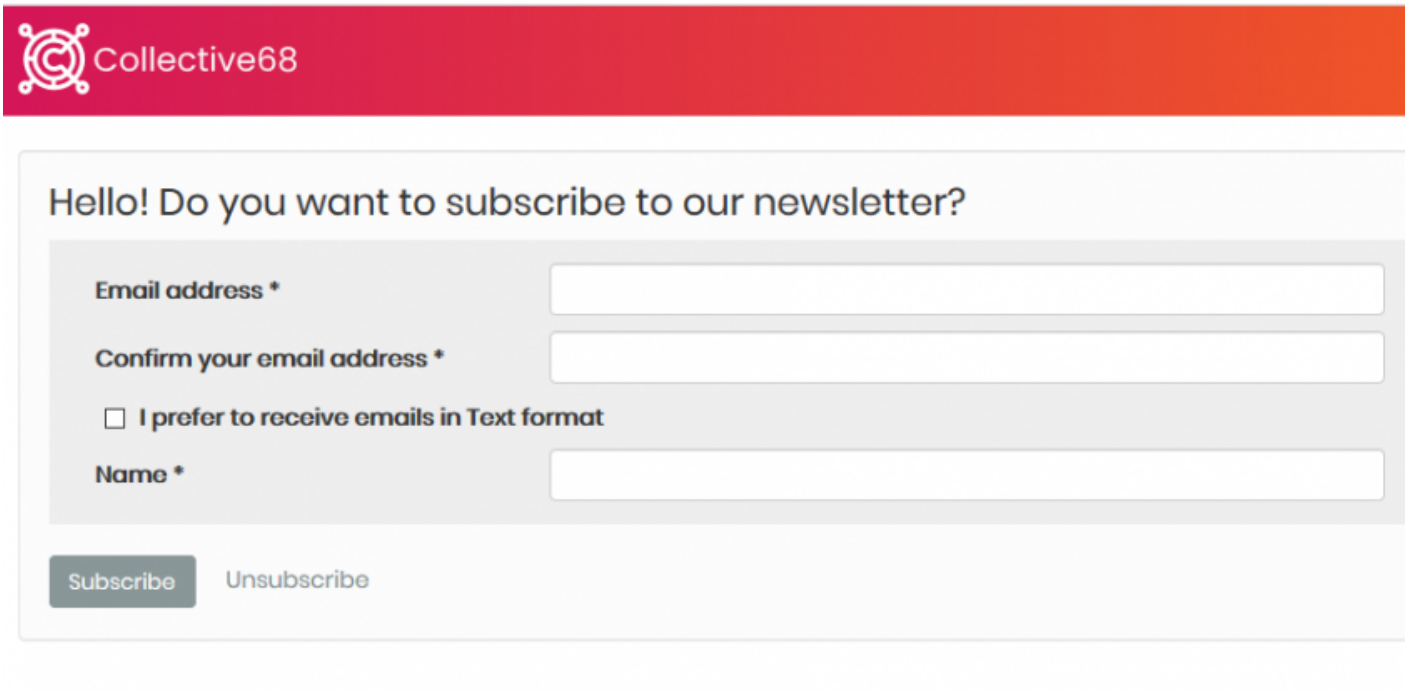


Subscribe pages

Subscribers can sign up to your lists though subscribe pages, which are fully customizable.

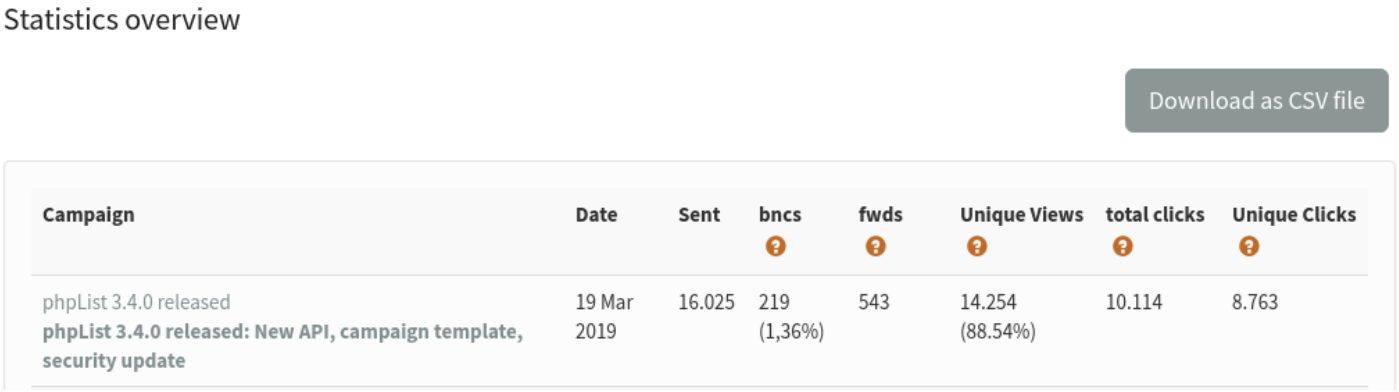


...and can be integrated with your website.



Campaign Statistics

You can view basic and detailed statistics about every campaign you send to help you learn more about your subscribers.



What is Open Source?

Open Source, or "Free Software", means that the original programming code is made freely available and may be modified. In practice this means that; phpList is very adaptable, easy to change and improve. Open Source development relies on communities of users contributing to the project they use. You pay nothing for the software, but you are encouraged to collaborate with the project though contributing code and/or though bug reports, translations, documentation, spreading the word and if you feel it has enriched your life, you can even donate!

What is phpList.com?

phpList.com offers phpList as a service is the cheapest way to have a fully working installation without having to worry about servers, blacklisting, bounces and deliverability. We manage the day to day maintenance of the software including updates and security.

Using phpList.com is also a great way to support the future development of phpList.

What does phpList not do?

phpList is a one-to-many email program. It cannot easily be used to have "email conversations" many-to-many as you might do on software such as mailman

Feedback

Discuss this chapter here.

Case studies

Below are six examples of how phpList is used, including a small business, a large business, a city and a community group. They are ordered by the number of emails sent per month.

- Large Business - 500,000 to 6 million emails per month
- Artist & Record label - 10,000 emails per month
- Re-seller - facilitating several phpList installations
- Small business - 500-1000 emails a month
- Government department - 500 emails a month
- Community Group - less than 100 emails a month

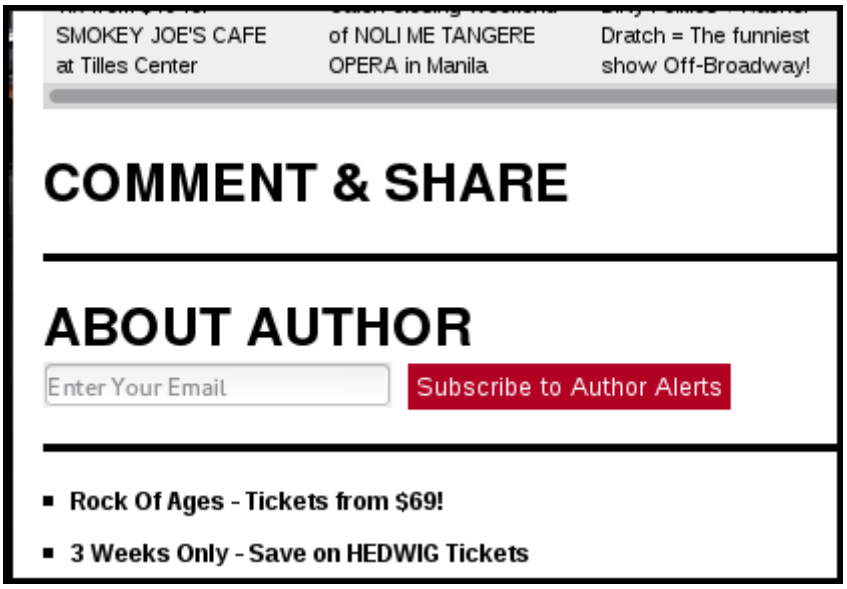
Large Business

BroadwayWorld.com is "the largest theatre website in the world" and is devoted to all things Broadway and theatre. Their website has news about shows, audition listings, user forums and a blog.

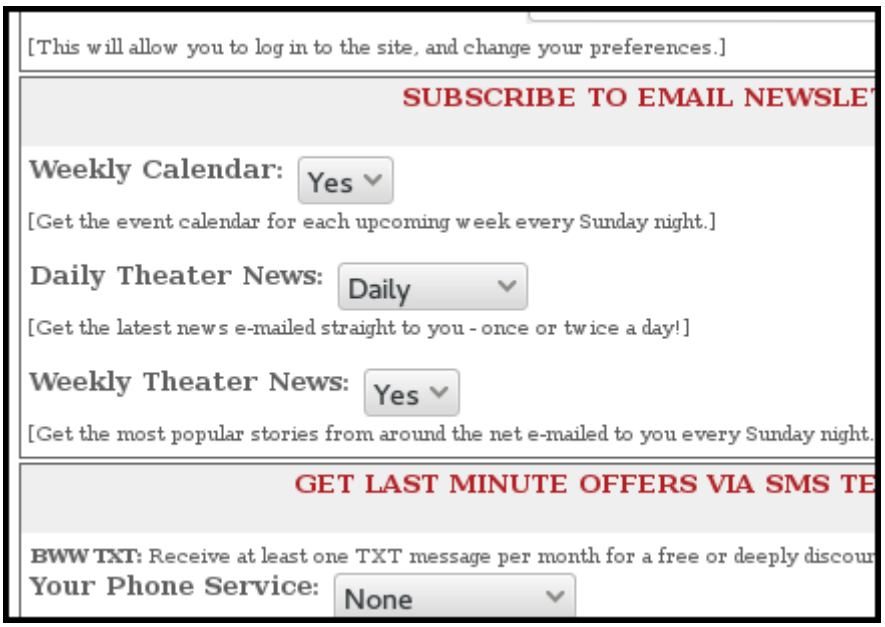


BroadwayWorld.com has around 500,000 subscribers on their phpList system, and these are divided into smaller lists by State and/or Country, for example.

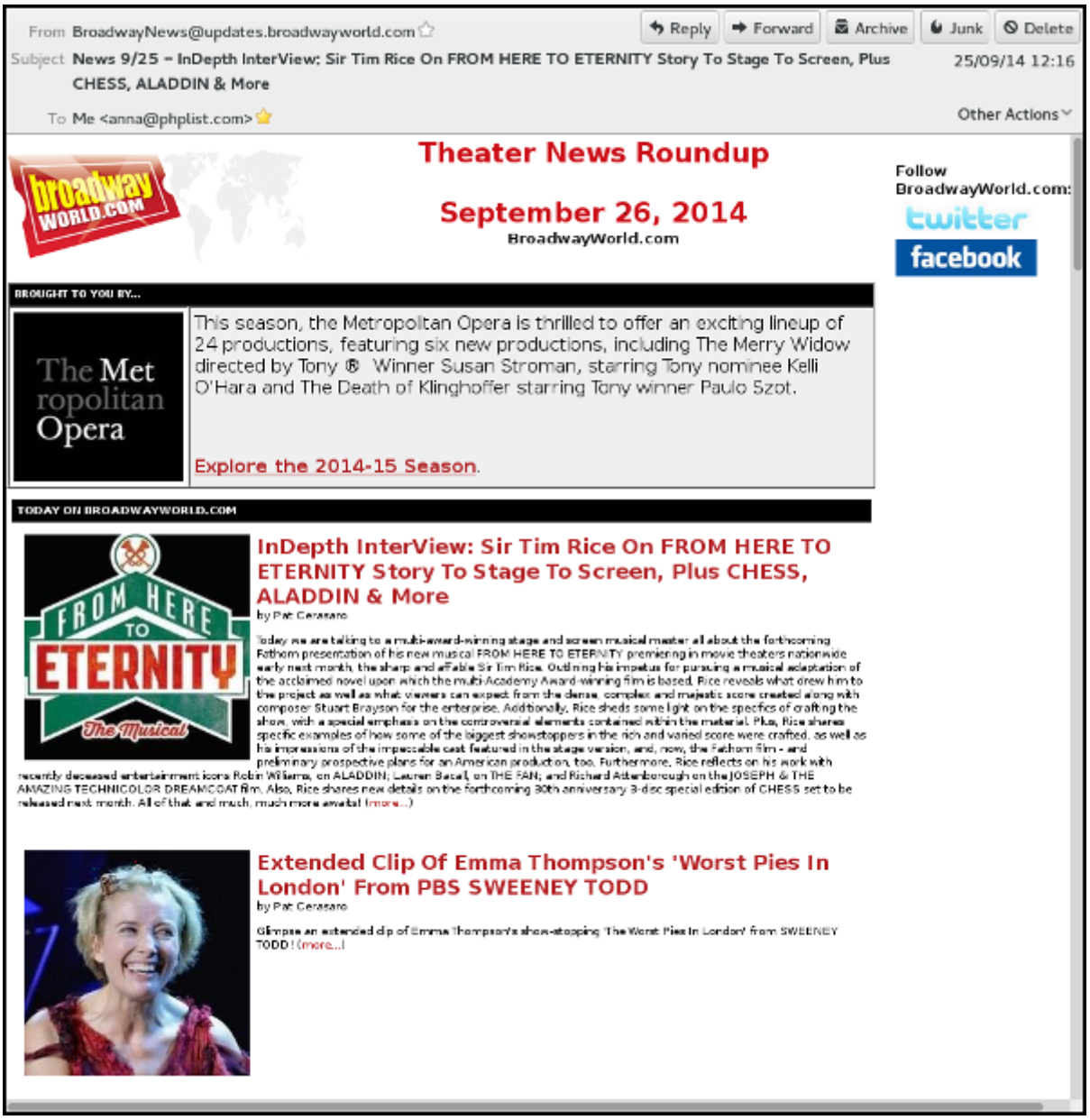
They grow their lists by sign up's though their website and from special offers and promotions throughout the year.



They send 2 to 3 campaigns per week which provide news and information to theatre lovers. They have an average open rate of 3-8%.



The aim of the BroadwayWorld.com newsletter is to provide readers with relevant information and special offers for Broadway shows and related media on behalf of advertisers.Their phpList system is managed by two staff members: one who collects the information from the advertisers and assembles campaigns and another who updates the lists and sends the campaigns, as well as dealing with any technical issues. They sometimes seek additional paid technical support from phpList Ltd.



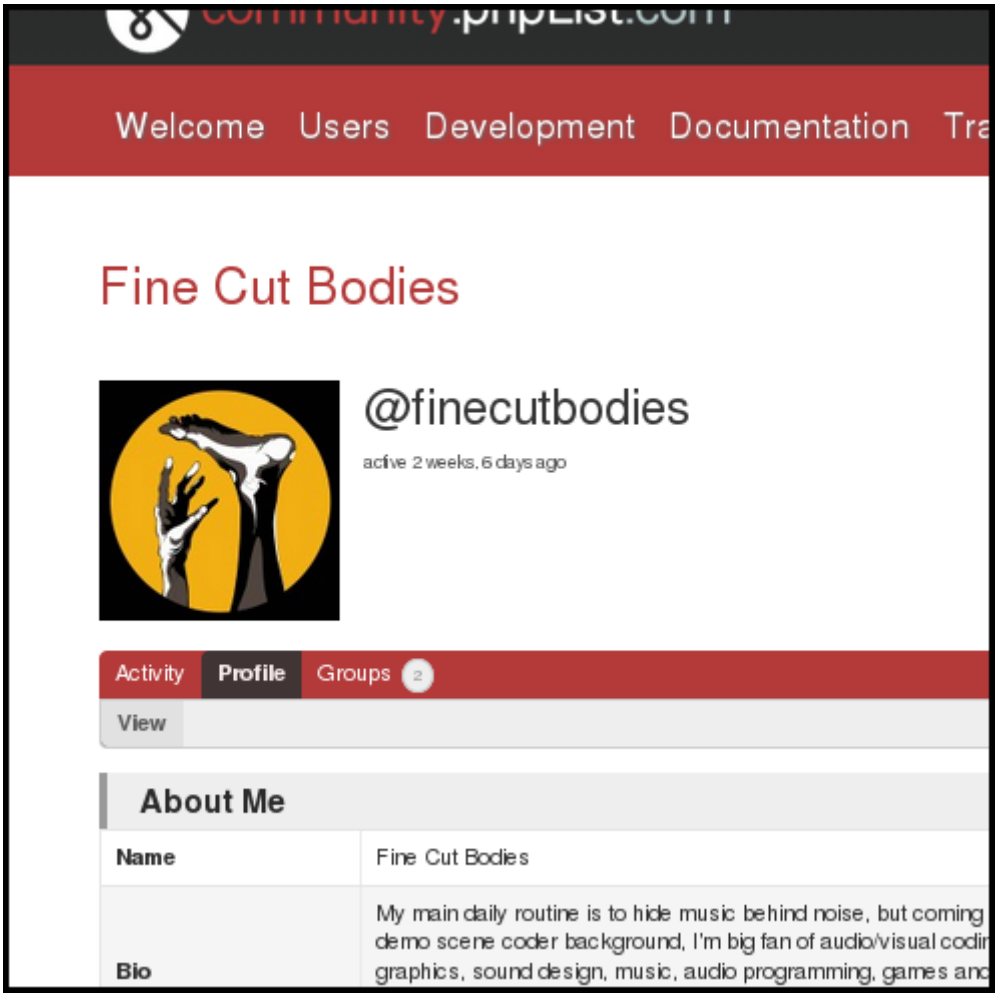
BroadwayWorld started their newsletter in 2003 when they launched their website: a newsletter has always been integral to their business model. Initially they used proprietary hosted solutions which they found too expensive. They then tried using a 'homegrown' solution but they soon outgrew its capabilities. For them phpList was the happy medium: easy to scale, free and within their technical capabilities to host. BroadwayWord has been using phpList since 2009.

Artist & Record label

Attila Fodor (FineCutBodies) is a musician, producer and a former developer (of playstation games!).

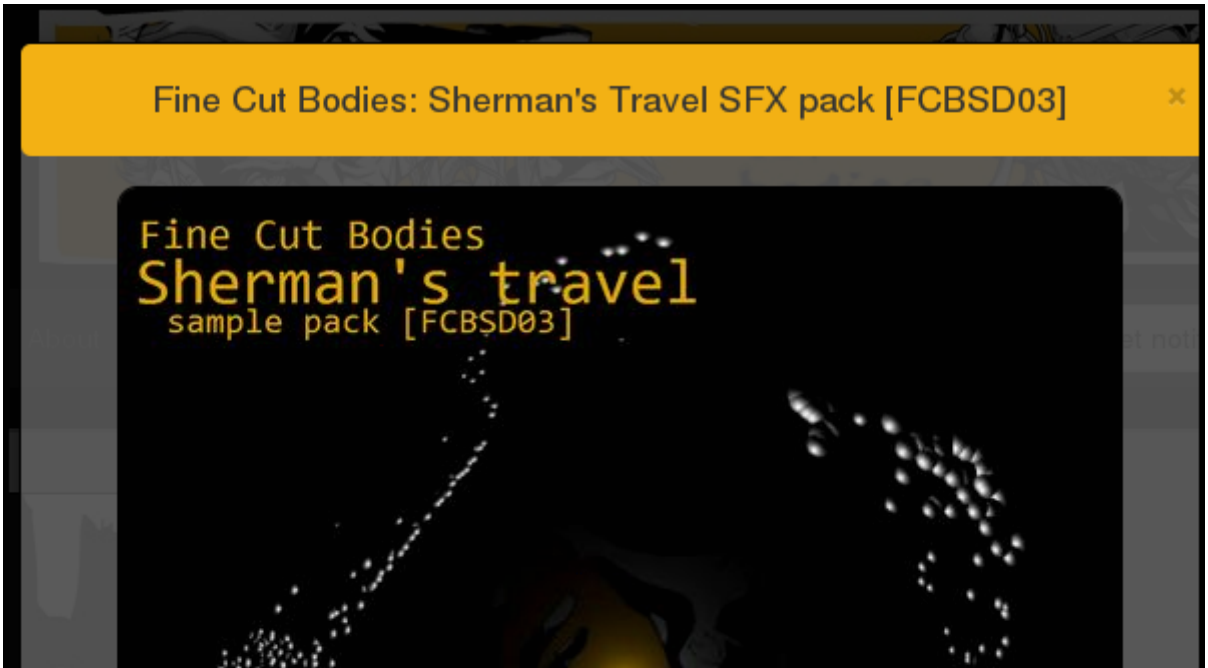
He runs an indie record label which has had more than 60 releases and hundreds of gigs since 2000. He goes on world tours and has aired over 700 hours of radio content in the last 15 years. He

also teaches at the Budapest School of Music Technology, running a regular class on digital technology and basic sound design paradigms. He is a regular phpList contributor.

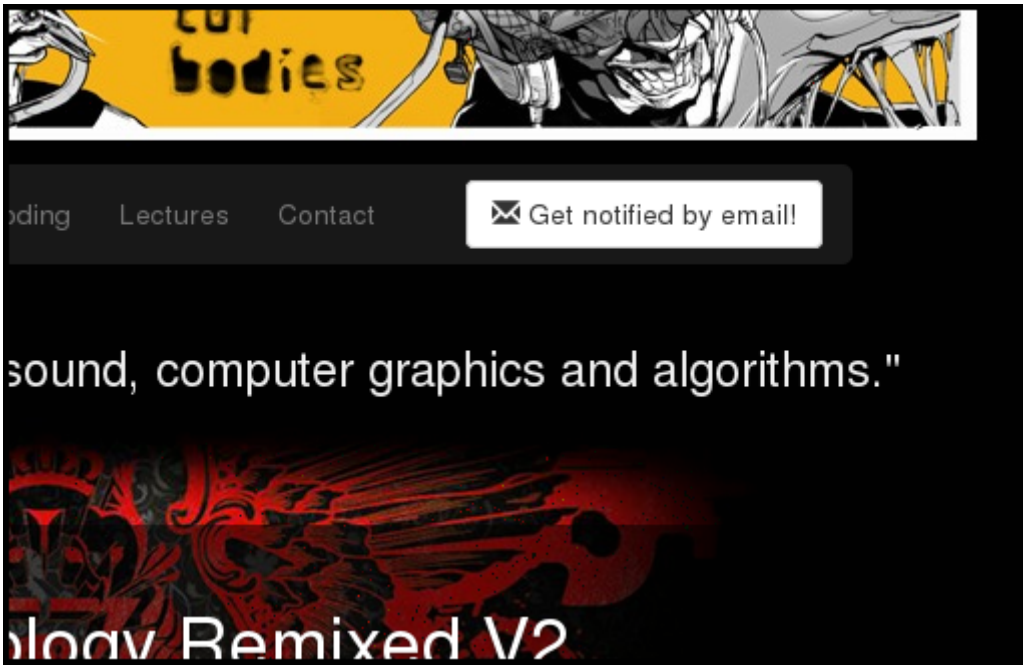


FineCutBodies started a newsletter when he founded his record label in 2001. He began by pasting email lists into the Bcc line in his mail software. When the list started to grow he tried a few different newsletter programs.

In 2014 he started searching for a newsletter software which could provide bespoke functionality and smooth website integration. As an audiovisual coder and video game developer, FineCutBodies has used his coding experience to customise phpList to his needs.



One example of this customisation is his download-for-signup system, where a visitor to the FineCutBodies.com website requests a free track/tool download in exchange for signing up to the mailing list.They then receive an email with the download url in: when the url is clicked the visitor is subscribed to the list on his phpList system.Additionally, subscribers are integrated seamlessly into the phpList system using javascript, rather than using the standard phpList subscribe pages.



FineCutBodies has a total of 10k emails across several public lists, as well as a private list for pre-release news aimed at music journalists.

The subscribers come from various online contact and sign up forms (see screenshot as well as the subscribe-for-download deal). FineCutBodies send one campaign per month per list and have an average recorded open rate of 20-30%.

Re-seller

Marsha Perry is a website developer. She specializes in small business websites, WordPress websites and WordPress coaching. Her company also provides phpList installations, migration, updates and integration.



Marsha also uses phpList for her own newsletter and it is her software of choice for newsletters in most circumstances. As a developer she finds it reliable: she said “some applications are ‘twitchy’ or delicate. phpList is a workhorse.”Her customers like phpList for a whole variety of reasons:

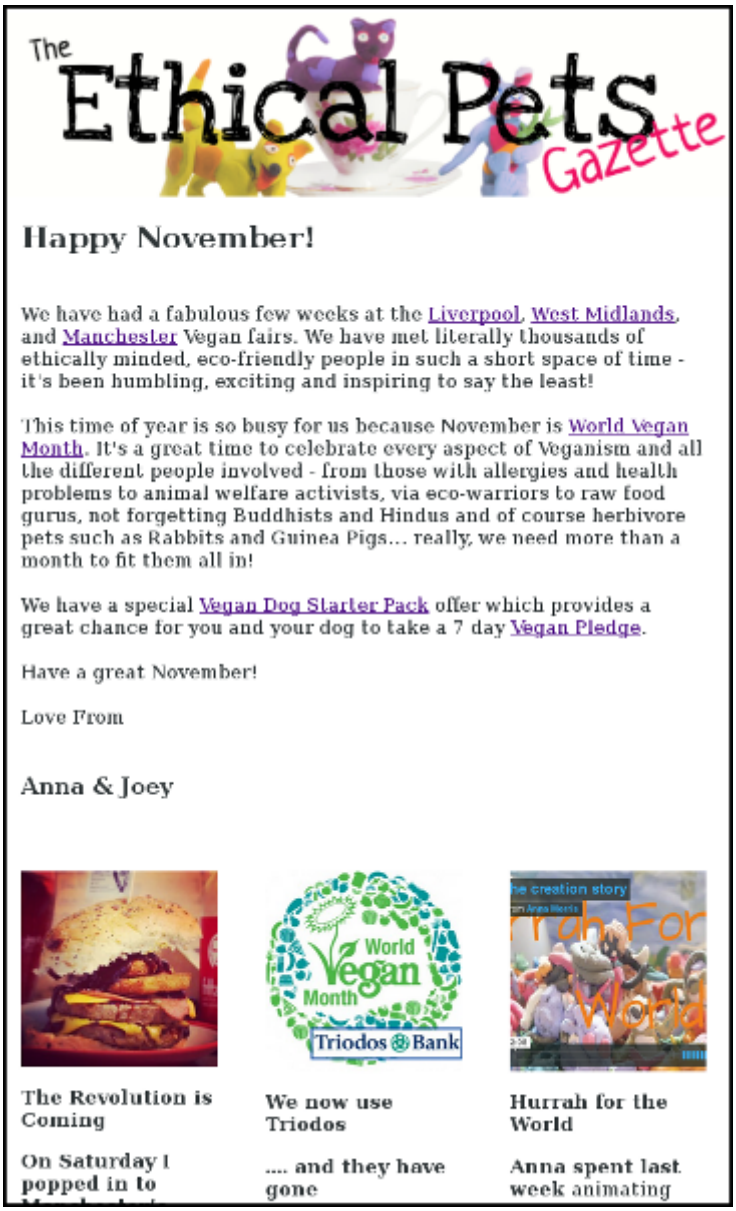
- They can have multiple lists and sign up forms with one installation.
- They can migrate to phpList without making subscribers opt-in again.
- They love that the software is free to use and well-supported via the forum
- They appreciate the flexibility and control they get.

Marsha does not think many of her customers are really aware of what Open Source means, but she feels they do appreciate some of the consequences of phpList’s Open Source status, especially that Marsha can tweak the code for them.



Marsha also offers phpList Hosted, as it is the perfect solution for one of her customers with a large mailing list. They had previously considered moving that customer's website to a host that allowed more outgoing emails per hour. Then she realized that with the Hosted version of phpList the website did not need to be moved.

Small Business



Ethical Pets is an online store based in the UK which sells Bio/Organic, ecological and fairly traded pet products.They began using phpList Hosted to send out a newsletter called *The Ethical Pets Gazette* five months after they launched their store, and have now been running the list for nearly three years.
Ethical Pets

- Publicise the ethical qualities of new products
- Share blog articles about environmental and animal welfare campaigns
- Encourage the feeling of friendship and community present in fairs and festivals

The Ethical Pets Gazette now has 750 subscribers. Most are customers whose addresses were exported from online shop software. There is an AJAX sign up form on their shop front and they sometimes segment their lists to target specific customer groups, for example, dog owners or cat owners.

Their average open rate is as high as 36%.>

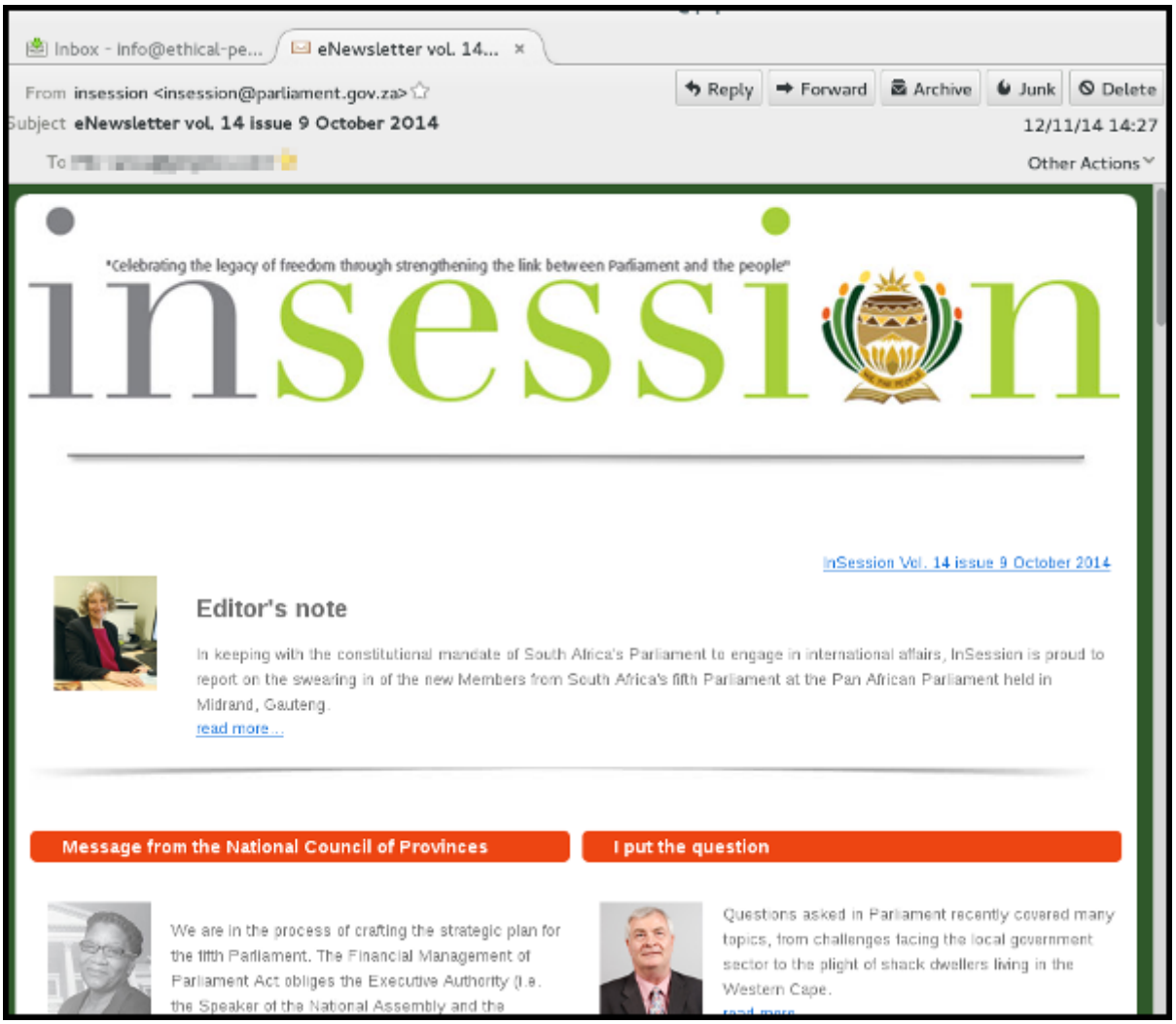
Government Department

The Parliament of South Africa is legally required to inform the citizens of South Africa about their work. Responsibility for this task falls on the manager of the Content and Information Unit at Parliamentary Communication Services, who is mandated to spread this information to as broad a range of readers as possible.

One of the methods used is the Insession newsletter, which is published on a monthly basis on their website as a pdf and e-book.



phpList is used to target the audience that wish to receive this newsletter digitally. *insession* is sent to subscribers as an HTML email with links to longer articles on the government website.



The Content and Information Unit have used phpList since March 2013, and the software was chosen by the IT department. Currently the *Insession* list has about 450 members, all of whom subscribed themselves via a web form during the normal course of parliamentary business.



Four staff of the Content and Information Unit manage the phpList installation. Two have access to the subscribers' replies and two upload the newsletters as an ebook and pdf onto the parliament.gov.za website.The government of South Africa also uses phpList to run an internal parliamentary list.

Community Group

The student group □□□□□□□□□ (Anaguma Eisa) at UW-Madison teaches and preforms Eisa, a form of Ja folk dance, originating from the Ryukyu islands of southern Japan.

The group have been using phpList since 2014 to further their mission to encourage people of all ages and abilities to develop their full potential through cultural understanding and performing arts.



Before adopting phpList they had been copy-and-pasting a small list of addresses into Bcc for each email update. Now in their second year of being an officially registered student organisation this method become untenable.They decided to set up a newsletter and list management system to:

- Keep prospective and current members engaged with the latest activities and concerts
- Communicate better with those who do not regularly check Facebook and Twitter
- Communicate by email more often, because this channel is more visible/high impact than social media

- Tell people about events in a way that is easier to refer back to (than social media)
- Create a system which can be run by multiple group members so they can share administrative responsibilities

Lucas Schneider, the president of Anaguma Eisa, chose phpList because:

- It is Open Source software
- Liked the clean look of the interface
- Felt it would be easy to manage several different lists
- Wanted to be able to embargo and end campaigns relating to performances (scheduling)
- Wanted the flexibility to compose anytime but send at a regular time (scheduling)
- Wanted to edit the 'from line' with ease
- Wanted to take advantage of the detailed statistics provided with each campaign



In the first few months of using phpList their list grew from 15 emails to 35 emails, across 3 lists. The society run:

- A list of active members of the organization
- A list for announcing upcoming performances
- A list for a general newsletter



The group add new members to their lists in three ways:

- Manually adding addresses from paper lists from student organization/freshers week fairs (photo 1)
- New sign ups from the form integrated into their website (photo 2)
- Sharing the subscription link on social media (photo 3)

They send 6 to 7 email campaigns each month: one email a week to active members with information about rehearsals and administration, one email a month to announce performances and a more general newsletter every couple of months. Their emails have an impressive average open rate of 50%.

Feedback

Discuss this chapter here.

About this manual

This manual has been written by the phpList community documentation team, individual volunteers, companies and phpList Ltd staff. This Manual is a self-hosted BookStack installation.

Aims

This manual will teach you how to use phpList. It provides real life examples where possible and chapters are goal oriented. We hope you will come away from each chapter with inspiration and motivation as well as an education!

Target audience and assumptions

The manual is aimed at users with average tech skills who are starting at the beginning with phpList. The first sections of the book assume that the reader has access to a pre-configured phpList install to play with, perhaps on phpList.com or provided by their employer. If this is not the case, then there are chapters about installing phpList later in the book which can be used to get started.

Disclaimer

Software is not static, it continuously changes. phpList is no different from other software, in that it is regularly updated to fix issues, add new features and respond to a changing environment of browsers and internet technology. This manual attempts to provide you with a guide to how phpList works, but the version you are using may be different from what is described here. The manual should help you to work phpList in a general way, but you may need to interpret it for your situation to make phpList do what you want it to do.

How to use this manual

Most chapters will walk you through a task, with a screenshot for each stage. It may be that you only require assistance with one aspect of a task, in which case skips ahead.

Styles

In this manual, words in **Bold** generally mirror the word in the application itself. Additionally, each level of a menu is signified with a >. If you need to go to Subscribers in the main menu, and then click Add new in the sub menu, then we would annotate this as **Subscribers** > **Add new**.

Documentation team

Thanks to all of the following contributors, in no particular order:

Dragonrider, Nikita Lyalin, Paul Mellors, Dan Waterloo, Elisa, Michiel, Mariela, Orsiris de Jong, JoJo, Lucas Schneider, Guido Hornig, Vedran Vucic, Sylvain, Andreas Tolfsen, Titano, Charlie Russell, Joseph Morris, Björn Balazs, Mindhack, Alexandru Berendei, Marius, Sam Tuke, Marcela Lopez Levy, kitchm, Rodrigo and Linda Ainsworth.

Feedback

Each chapter in this manual has a corresponding discussion thread on our forums, linked at the bottom of the chapter. For example:

Discuss this chapter here.

You can use these forum threads to discuss a chapter, for example, if something on your system differs from the description in the chapter, if an instruction in the chapter does not work for you or if have an idea to improve a chapter generally. For more information see the documenters home page.

GDPR

Using phpList for compliance with the GDPR

This chapter provides an overview of features and functionality of phpList version 3.3.3 and higher, implemented for phpList administrators seeking to be compliant with the General Data Protection Regulation in their data management practices.

The GDPR is a regulation in EU law which includes legal requirements for how the data of people in the EU is handled, including the kind of data collected by installations of phpList. The laws affect all entities which handle such data regardless of where they are based. In addition, the EU's directive on electronic privacy contains rules on the use of email for the purposes of direct marketing.

Ultimately it is the administrators of a given installation of phpList who are responsible for managing data responsibly. The following technical features of phpList relate to common strategies for complying with the regulations as they stand.

Note: GDPR is a comprehensive set of regulations which covers much more than just technical operation of the newsletter software that you use. For comprehensive information about entities' responsibilities, consult the Information Commissioner's Office, the European Commission website, or independent legal advice. You can find the full text of the GDPR here.

Note: Features which are not present in older versions are labelled (⇧phpList-3.3.3) for convenience.

Sensitive ("special category") data

The GDPR makes distinctions between different types of data and the protections they require.

- Do not store particularly sensitive data within phpList (e.g. as user attributes). Examples of data in this category are data relating to medical history, sexuality, or ethnicity.
- If children are not your target audience, consider adding a required attribute to your subscribe pages and sign up forms for age confirmation
    - (⇧phpList-3.3.3) A Default Attribute exists for convenience which requires subscribers to confirm they are 16 or older – you can load it easily via the Config

→ Configure Attributes page

Justification for data processing

The GDPR requires that organisations have one of six possible legal justifications for processing subscriber data.

Consent

The justification most commonly used by newsletter and email marketers is that consent has been obtained from all their subscribers. In some situations, marketing by email can only be carried out with consent. The GDPR uses a specific definition of consent, and defines how it may be acquired and managed. phpList can easily be used to obtain and manage subscriber consent.

- If your subscribers sign up to phpList directly using subscribe pages, widgets, or custom forms:
  - Consider adding a required consent checkbox which links to your legal policies
    - (⇧phpList-3.3.3) A Default Attribute exists for convenience which requires consent to the website Terms of Service – you can load it easily via the Config → Configure Attributes page
  - Consider adding a comprehensive explanation of why, how, and for how long their data will be used, to either:
    - The confirmation email message text which they automatically receive
    - The subscribe page or form which into which they initially add their details
- Only import subscribers into phpList for which you have auditable evidence of adequate consent
- Send re-permission campaigns using the Invite Plugin to re-obtain consent from inactive subscribers
  - (⇧phpList-3.3.3) The Invite Plugin is included with phpList by default but must be enabled on the Config → Manage Plugins page
  - (⇧phpList-3.3.3) A template re-permission campaign is included by default as a draft for easy use and reference
- Use the “Delete subscribers who signed up and have not confirmed their subscription” option on the Reconcile Subscribers page to remove subscribers who have not provided adequate consent
- (⇧phpList-3.3.3) Use the “Delete subscribers who are blacklisted because they unsubscribed” button on the Subscribers → Reconcile Subscribers page to delete all blacklisted subscribers who unsubscribed from your lists
- Use the “Delete all blacklisted subscribers” button on the Subscribers → Reconcile Subscribers page to delete all blacklisted subscribers, including those who were blacklisted due to consecutive bounces, and are therefore unreachable

Legitimate interest

Another common legal justification for processing subscriber data is that the organisation responsible has a "legitimate interest" in doing so. "Legitimate interest" can apply in cases where a service has been requested by a subscriber, and storing their subscriber data is necessary for providing this service, or where an employer is processing the data in order to communicate with their staff. It can also apply to public relations professionals who maintain lists of journalists and associated data, depending on the circumstances.

Right of access

The GDPR grants people in the EU the right to access the data you have which relates to them.

- Check that your Admin Email address (“Person in charge of this system”) is accurately set so that subscribers can contact you
- (⇧phpList-3.3.3) When a subscriber requests their data, use the Data Export feature to download a report containing their data
- If you store data about subscribers in third party applications (e.g. Wordpress or a CRM system), export and include that data for the subscriber in response to their request as well

Right to rectification

The GDPR grants people in the EU the right to update inaccurate data which you store about them.

- Do not remove the preferences link placeholder within your campaigns to ensure easy access for subscribers
- (⇧phpList-3.3.3) Refer them to your phpList installation homepage (`http://your-domain.com/lists` by default) so they can find the preferences page if they don’t have a link
- (⇧phpList-3.3.3) Use the Preferences Page button on a Subscriber Details page to obtain a personalised preferences page link for a subscriber directly

Right to erasure

The GDPR grants people in the EU the right to have their data erased in some situations.

- To permanently delete a subscriber and all records related to them, first blacklist them and then Use the “Delete all blacklisted subscribers” button described above