



NewsletterPro Financial™

User Guide

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Introduction to NewsletterPro Financial™ User Guide

NewsletterPro Financial™ includes a weekly HTML email newsletter called the **Financial Report™** that you can personalize and send out via email to your own customer list.

NewsletterPro Financial™ enables you to have the following options:

- Add/Update your name and address information
- Upload your personal photo
- Upload your company logo
- Include your own commentary within the editable region of the newsletter
- Include up to 3 links to mortgage calculator
- Manage your own distribution lists

You can do all this quickly from the comfort of your own personal computer. This quick guide will walk you through the simple instructions for using NewsletterPro Financial™.

1. How do I login into NewsletterPro™?

Enter your email as the user name and use your personalized password to enter the site and click login.

- **Note:** You should have received a previous email when you first subscribed which provided you with a valid username and password. If you did not receive this, please contact us for more information.

Login:

1. Visit: <http://www.newsletterproonline.com/financial/newsletters/wp-login.php>
2. Enter:
 - a. username: john.doe@yahoo.com
 - b. password: *****
3. **Click: *Login Remember me*** to have the website keep your security information so you can easily login the next time you enter the webpage.

When you have successfully logged into your account, the first thing you will see is the following screen:

Example 1: NewsletterPro™ Welcome Page

The screenshot shows the NewsletterPro™ Financial Marketing System dashboard. At the top left is the logo. At the top right, it says "Hello, Dave Hershman" with links for "My Account" and "Log Out". Below the header is a navigation menu with "Dashboard" selected, and other options: "Write", "View Newsletters", "Users", "User Guide", and "Options (for Dawn only)". The main content area has a "Dashboard" heading, followed by "Welcome to the NewsletterPro Dashboard". Below this, it says "Use these links to get started:" and lists a link: "Update your profile or change your password". Then, under "NewsletterPro Financial Marketing System documents:", there is a list of links: "Startup documents and Back Pages", "The Financial Pages™", "The Sales Update™", "The Financial Update™", "The Financial Report™", and "Flyers and Letters™". At the bottom, there is a "NEW! Video Tutorial" section with a link: "Click Here to download a video tutorial of the NewsletterPro Financial Marketing System".

2. How do I personalize my account?

Your Profile and Personal Options-Dashboard

You are now at the Dashboard Screen. This is the NewsletterPro Financial™ welcome screen. On this page helpful links will appear to guide you through the setup phase of NewsletterPro™.

You can edit your profile or change your password by simply clicking on the [Update your profile or change your password](#) link. This link will take you to the **Profile** tab which appears on the upper left hand corner of your screen.

- **Note:** *Also on this page you will notice a few things... There is a welcome notation to your nickname which states, **Hello** [name], (this will be the nickname you provide under the Profile section.)*

On this screen, you also have the option to **Log Out**, or to visit **My Account**. The two areas are hyperlinked and you can visit either page by placing your mouse over the link and simply clicking once. This will take you to the page you want to visit.

Example 2: Your Profile and Personal Options

NEWSLETTERPRO™
Hello, **Dave Hershman**. My

Dashboard Write View Newsletters Users User Guide Options (for Dawn only)

Your Profile Users Company Logo Personal Photo

Your Profile and Personal Options

About yourself

Username: (no editing)

First name:

Last name:

Display name on your newsletter as:

Enter your personal co-branded text here to be displayed (in addition to your contact and address information) in your personalized section of each newsletter.

The Hershman Financial Group is dedicated to bringing the American Dream of Financial Independence to our clients.

We provide a variety of competitively priced financial products and services that are designed to help you achieve your financial goals.

As the experts in the world of finance, we

Contact Info

E-mail: (required)

2nd E-mail: (can be the same as above; this is the "reply-to" email for unsubscribing)

Phone 1:

Phone 2:

Company:

Update Your Contact / Address block

This information is mandatory for CAN-SPAM email laws:

Address 1:

Address 2:

City:

State:

Zip:

Disclosure

Enter any disclosures that your state and/or licensing status may require. If you require no special disclosures, then leave this field blank.

Licensed financial planning company in the states of MD, DC and VA.

Financial Calculator Links

Pick the display order and number of calculators that you want displayed in your right-hand navigation bar.

Link 1:

Link 2:

Update Your Password

If you would like to change your password type a new one twice below. Otherwise leave this blank.

New Password:

Type it one more time:

About Yourself

On this page, you can personalize your profile by editing your first name, last name, and your name as you want it displayed on your newsletters. **You should do this immediately upon receiving your login information the first time via email.** Your display name will appear on each screen as a welcome salutation.

You also have an area where you can enter personal co-branded text to be displayed with your profile within the personal section of your newsletter. Here you can provide any personal information that you feel might helpful or useful to your target audience.

Once you have completed any additions or changes to your profile, click on **Update Profile** to save the changes. New or updated information will not be saved unless you do so.

Contact Information

In this section you must enter a valid email address. If you do not have a valid email address, you will not be able to operate NewsletterPro™. You must also enter a second email address (can be the same as the first) which will be used as the “Reply To” address for if your subscribers want to reply to your newsletter email. You also have the option of entering up to two phone numbers. Once you have completed any additions or changes to your profile, click on **Update Profile** to save the changes. New or updated information will not be saved unless you do so.

Update Your Contact / Address Block

This section has mandatory information that must be supplied in order to comply with CAN-SPAM laws – your company address information. This information will be displayed in the personalized section of your newsletter.

Financial Calculator Links

NewsletterPro Financial™ lets you add up to two financial calculators for your newsletter subscribers -- Pick the display order and number of calculators that you want displayed in your right-hand navigation bar, or you can also choose not to have them displayed at all.

Financial Calculator Links

Pick the display order and number of calculators that you want displayed in your right-hand navigation bar.

Link 1:

Link 2:

Update Your Password

In this section; you may change your password to one you would like to have. To perform this option, you must type your new password once under **New Password** and again under **Type it one more time**. If you do not want to change your password, please leave this section blank.

Once you have completed any additions or changes to your profile, click on **Update Profile** to save the changes. New or updated information will not be saved unless you do so.

3. How do I add a Personal Photo or Logo?

Personal Photo

To upload or change your personal photo, click on **Personal Photo (see Example 2 above)**, within the User Profile section, and you can you can upload your personal photo with the extension of **.jpg**, or **.jpeg**, as long as it is no larger than 300 KB in size and no larger than 200 x 200 pixels (150 x 150 will usually work better)

Click on **Browse** and then you can visit the site on your personal computer where you stored your picture. Find the picture you wanted to select as yours and click on the photo to select it. Once you have completed that task, you can hit **update file** to upload the picture.

Once you have completed this task, click on **back to your profile** to get you back to your main screen.

Once you have completed any additions or changes to your profile, click on **Update Profile** to save the changes. It is as simple as that.

*****Need help sizing your logos and photos? For a nominal fee, Colorworks Promotions will resize your logos and photos to accommodate this new system. Please contact Joy Reiher at reiher@colorworkspromotions.com for a quote and more information.*****

Company Logo

To upload or change your company logo, click on **Company Logo (see Example 2 above)** within the User Profile section and you can upload your company logo with the extension of **.jpg**, or **.jpeg**, as long as it is no larger than 300 KB in size and no larger than 200 x 200 pixels (150 x 150 will work better)

Click on **Browse** and then you can visit the site on your personal computer where you stored your picture. Find the picture you wanted to select as yours and click on the photo to select it. Once you have completed that task, you can hit **update file** to upload the picture.

Once you have completed this task, click on **back to your profile** to get you back to your main screen.

Once you have completed any additions or changes to your profile, click on **Update Profile** to save the changes. It is as simple as that.

*****Need help sizing your logos and photos? For a nominal fee, Colorworks Promotions will resize your logos and photos to accommodate this new system. Please contact Joy Reiher at jreiher@colorworkspromotions.com for a quote and more information.*****

4. Can my web address appear on the HTML newsletter?

Web addresses will no longer upload onto the Financial Report. We have come across issues with spam blocking programs. Larger companies have filters in place that will identify your emailed newsletter as spam. Enter your web address on the profile page under **co-branded** text.

5. When/How will I receive the HTML newsletter pages?

Every week you will receive the HTML email newsletter in your email inbox, personalized with whatever information you currently have in your personal profile (see instructions above on how to personalize.) You will forward this email to whatever email distribution list you own. NewsletterPro Financial subscribers that “spam” with the newsletter will have their accounts terminated immediately.

6. How do I view the weekly Financial Report™?

If you do not receive the weekly newsletter in your inbox, you can also view in the system. Click on the **View Newsletters** tab. Under **View Newsletters**, you have the option to **search** and **browse** for NewsletterPro Financial™ editions current, past or present. You can direct the system to email you the newsletter as well as copy a web link in which you can direct others to view the newsletter.

Viewing NewsletterPro Financial™

Example 3:

Example of the
"Manage" Screenshot

The screenshot shows the NewsletterPro Financial Marketing System interface. At the top, there is a navigation bar with links for Dashboard, Write, View Newsletters, Users, User Guide, and Options (for Dawn only). Below this is a sub-navigation bar with links for Newsletter, Pages, Categories, Post templates, Page templates, and Email Notification. The main content area displays "Your Drafts: financial test 2, financial test." and "Last 15 Posts" with a search box and a "Browse Month..." dropdown menu set to "January 2009". A table lists the newsletters with columns for ID, When, Title, Categories, Author, and actions like "Templatize", "View this newsletter", "Email this Newsletter to me", "Edit", and "Delete".

ID	When	Title	Categories	Author				
890	2009-01-25 4:35:08 pm	January 27, 2009 Financial Report	Financial Report	Dave Hershman	Templatize	Copy URL to clipboard: http://www.newsletterproonline.com/financial/?p=890&id=1	View this newsletter	Edit Delete

If you click on the **Search Newsletters** box, you will have the ability to review each newsletter by categories that have been published in the past weeks. Click the **Search** option, and you will be able to review each letter by categories such as:

- ID
- When
- Title
- Categories
- Author

Type a keyword or keywords into the **Search** box for the content of the newsletter you are searching for..

Example:

1. Click the arrow under the **Browse Month** section and a listing of all postings from each month will appear.
2. Highlight the month you want to see, i.e., January 2009 and the click on **Show Month**.
3. That month's newsletter s will appear and provide information on:

- ID
- When
- Title
- Categories
- Author

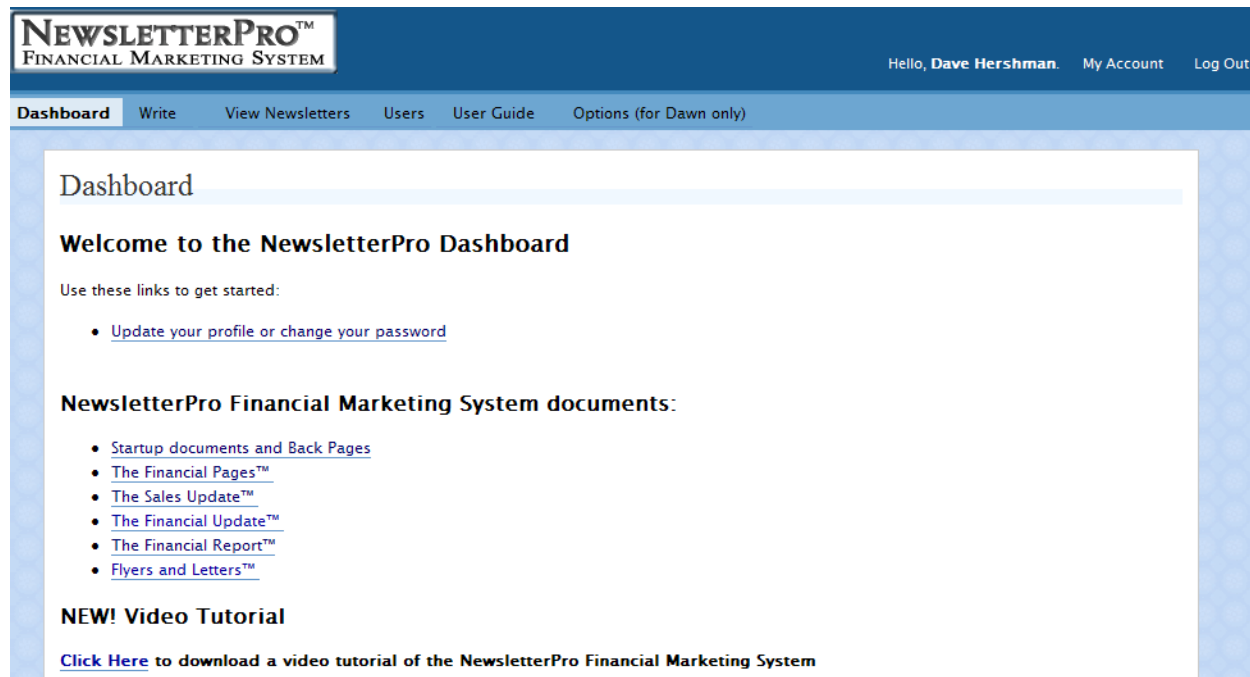
*Note: The drop down menu may contain posts that are only available to the site administrators.

Actions For An individual Newsletter:

For each of the individual newsletters, you can do one of 3 different actions:

1. Copy its web address (“URL”) to your clipboard to send to later paste in an email to send to someone
2. View this newsletter – a new browser window will pop up displaying that newsletter, including your personalization box
3. Email this newsletter to me – in case you lose a copy of a newsletter, you can simply have it emailed to you again (to the email address in your User Profile settings) so that you can forward as desired

7. What Are the Additional Documents located in the NewsletterPro Financial™ Marketing System?



The screenshot shows the NewsletterPro Financial Marketing System Dashboard. At the top, there is a navigation bar with the logo on the left and user information on the right: "Hello, Dave Hershman. My Account Log Out". Below the navigation bar is a secondary menu with links: "Dashboard", "Write", "View Newsletters", "Users", "User Guide", and "Options (for Dawn only)". The main content area is titled "Dashboard" and contains a welcome message: "Welcome to the NewsletterPro Dashboard". Below this, it says "Use these links to get started:" followed by a bullet point: "Update your profile or change your password". A section titled "NewsletterPro Financial Marketing System documents:" lists several documents with bullet points: "Startup documents and Back Pages", "The Financial Pages™", "The Sales Update™", "The Financial Update™", "The Financial Report™", and "Flyers and Letters™". At the bottom, there is a "NEW! Video Tutorial" section with a link: "Click Here to download a video tutorial of the NewsletterPro Financial Marketing System".

NewsletterPro Marketing System Documents:

On your “Dashboard” page, there are also additional reports and documents available to you that are updated on a periodic basis:

- **Start Up Documents and Back Pages.**
- **The Financial Page™**
- **The Sales Update™**
- **The Financial Update™**
- **Flyers and Letters**

8. What are Back-Pages?

Back Pages enable you to convert the newsletter into a self-contained mailers by printing a newsletter page on the blank side. There are back page alternatives posted both in legal and regular size to accommodate the newsletter pages. The publisher version can be completely personalized/customized. The PDF version can be personalized by adding your personal information in the text boxes provided. Distribution can be applied via mail, fax or in person. To print a newsletter page onto the back-page, simply print the back page of your choice, then place the back page back into the printer, text up, with the top of the page to the back of the printer. Once printed, the page is now ready to be folded, addressed and distributed.

9. What is the purpose of the Start-Up Pages?

Start Up Pages are documents provided to help you begin to market yourself using the NewsletterPro Financial™ Marketing System. They may contain information on how to use the system or as an announcement for you to distribute to let others know that you have this service. This section also contains a banner that can be placed on your website and/or under your email signature to give your sphere the ability to sign up for the newsletters. Instructions are included with this document.

10. How do I use the Flyers and Letters?

Flyers and Letters – Throughout the year, a variety of flyers and letters will be posted along with the newsletter pages that will be targeted to the substance of the written material of the newsletters or articles. For example, if we have a written article on homeowners insurance alternatives, there may be a flyer or letter posted to advertise the fact that your company is the homeowners insurance expert. The flyers and letters aim to entice others to call you to receive a free copy of an article that may help those looking for insurance. Response mechanisms work.

11. Do I send out all of the pages to each of my contacts each month, or are they targeted toward different audiences?

- **The Sales Update** – The ultimate tool for all of your business targets-Realtors, title companies, loan officers, insurance agents, financial planners, CPAs and more. The Sales Update is designed to teach all sales personnel and business owners how to increase their production through advanced marketing and sales techniques.
- **The Financial Page** – Articles that help Americans understand specific financial topics. Jointly mail these articles with realtors, financial planners, loan officers and more to their customer sources. You will be providing value to synergy partners as well as directly to consumers while presenting yourself as an expert.
- **Financial Update** – This four page newsletters is a traditional self-mailer that is designed to deliver quick, concise professional news to keep prospects and previous customers informed as to the status of their most important investments. The articles cover and explain the state of the economy, news on financial trends, real estate, interest rate trends, government activity and how these may affect their investments and business.

12. Can I personalize these pages as well?

Yes, the newsletter files are posted to the site in two formats:

A. Publisher Files If you have Publisher 2003 or newer, the newsletter publisher files can be completely customized. You can add or delete text within the body of the newsletter, add your own graphics; change the font type and color. The text box on the bottom right hand side of the page is for your contact information. You can type it into the text box or photocopy your business card. Once you have customized a page, you may want to convert it to a pdf file as most of your recipients will have Acrobat Reader on their computers. If you send a publisher file, your recipient will not be able to view it unless they have Microsoft Publisher. ***Please see the instructions below on how to convert a Publisher file to a PDF file.** Publisher files can also be emailed in the body of an email like an HTML. We recommend this option for one-page documents only.

B. PDF Files. The PDF files are available for those who are not comfortable using Microsoft Publisher or who don't want to customize the newsletter pages. This is a simplified version of the newsletter pages that allows for personal information to be entered into the text box on the bottom right without the use of Microsoft Publisher.

Information such as that listed below can be entered into the personalization area(s) that have been setup on each document (please note that some pages have more than the box on the bottom right side that can be personalized):

Sally Smith
Senior Loan Officer
USA Mortgage Company
123 Mortgage Way
Mortgagetown, MD 11111
301-222-2222
800-222-2222
www.usamtg.com

*To convert a file to a pdf file, you can download a free program called CutePDF Writer. Go to <http://www.cutepdf.com> and follow the directions to download the program. To use CutePDF Writer, open a newsletter publisher file, select **file** and then **print** making sure to select CutePDF as your printer. The file **will not print**.....you will be asked where you want to **save** the file. The file will save as a pdf file.

13. How do I distribute the newsletters?

Once you have personalized/customized the pages to your liking, you can print and mail the newsletter, email it as an attachment, or publish the files to the Web. For those of you who have higher versions of Publisher, you have the option to convert your Publisher files to HTML/Posting on a Web Site or email the Publisher file directly from Publisher as the body of an email. To email as an HTML you/your company must have it's own server.

Publish files to the Web:

You can publish a Web site to a Web server, a network server, a File Transfer Protocol (FTP) server, or to a folder on your own computer.

Publish a Web site to a location on the Internet or on a network. To publish your Web site on the World Wide Web (WWW), you must subscribe to a Web hosting service. A Web hosting service provides Internet access and storage space on Web servers. Before you publish your Web site, contact your Internet service provider (ISP) or system administrator to get the information that you need to publish and the Uniform Resource Locator (URL) of the Web site where you can save files. On the File

menu, click **Publish to the Web**. In the File name box in the Publish to the Web dialog box, type the URL of the Web or network server where you want to save your Web site — for example, <http://www.northwindtraders.com> — and then click **Save**. If prompted, type your user name and password, and then click **OK**. The directory associated with your URL will appear in the Publish to the Web dialog box. Double-click the folder where you want to save your Web site. In the File name box, select **index** as the default name for your home page, and then click **Save**. When prompted, click **OK**.

Publish a Web site using FTP Before following this procedure, contact your Internet service provider or system administrator to get the information that you need to publish to an **FTP** site. You also have to create an FTP site in FTP Locations.

- On the File menu, click **Publish to the Web**.
- In the Save in box, click **FTP Locations**.
- Double-click, **Add/Modify FTP Locations**.
- Enter the information you received from your Internet service provider, and then click **OK**.
- Click **Cancel**.
- On the File menu, click **Publish to the Web**.
- In the Save in box, click **FTP Locations**.
- In the list of FTP sites, double-click the site you want, and then double-click the folder where you
- want to publish your Web site.

NOTE If your Internet service provider (ISP) requires you to use a specific program to upload your Web site, or if you are publishing your Web site to a corporate intranet, you may need to save a version of your Web site in a specific **HTML** file format and follow a different procedure to publish your Web site. Ask your ISP or your system administrator for information about how to save and publish your Web site.

How to Email as an Attachment:

Once you have the document you would like to email open in Publisher:

- Go to **File** and select **Send Email**. (Some versions offer options once you select this while others just bring up the email.) If you are given options, you will want to select **Send As Message**. Then simply enter the email address for those that you would like to distribute the newsletters to and send.
- Some versions of Publisher also have the email option on the menu bar running across the top of the screen. You will see an icon next to the print or save button that looks like a letter and an envelope. Click on this button and it will bring up the same feature listed above.

14. What if I forget my password?

If you forget your password, there is a Forgot Your Password link on the login page. Click on this link and your login information will be emailed to the address in your account.

Once you have personalized your NewsletterPro Financial™ settings, you are ready to go. Now you can review past and present versions of NewsletterPro Financial™ and send personalized NewsletterPro Financial™ versions via email to your own personal distribution list so you can keep your targeted audience on top of the latest information and news. Welcome again to NewsletterPro Financial™ and we look forward to working with you in the future!

The Hershman Group and the NewsletterPro Financial™ Team