

Sitelok Sendgrid Plugin



V1.2

Sitelok Sendgrid Plugin

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Chapter 1 Introduction

What is the Sitelok Sendgrid plugin?

The Sendgrid plugin is an add on for Sitelok that allows emails to be sent using Sendgrid's reliable mail system. You can read more about this service and signup for an account at

<https://www.sendgrid.com>

Once installed and configured Sitelok will send all emails using Sendgrid. If for some reason this is not possible the default email system in Sitelok will be used as a backup.

For emails sent using Sendgrid you will be able to see which emails have been delivered, opened, clicked, bounced or reported as spam in the Sitelok log (and user recent activity). Comprehensive statistics allow you to see information for all emails or a specific email (based on the subject) sent during a period of time, including which links were clicked.

The plugin can automatically handle bounced emails and complaints. These can be recorded in the Sitelok log and the user account flagged in a users custom field. If you also use the Email Unsubscribe plugin you can automatically stop emails being sent to flagged addresses.

Chapter 2 Installation

Installing for the first time or upgrading

- 1) Extract the contents of the zip file to your PC.
- 2) Upload the plugin_sendgrid folder to your existing Sitelok slpw folder using FTP. There are no special permissions required on most servers.
- 3) Login to the Sitelok control panel.
- 4) Open the following URL in the browser

http://www.yoursite.com/slpw/plugin_sendgrid/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.

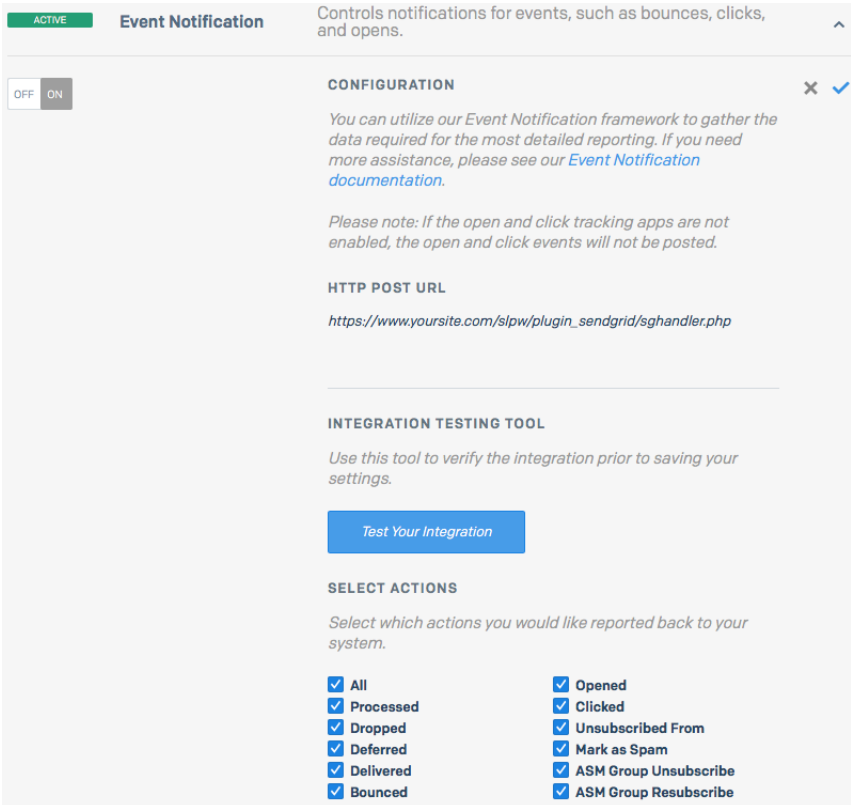
If you have any problems with installation please let us know so that we can help you.

Setting up your Sendgrid account

- 1) Login to your Sendgrid account and click **Settings - Tracking** in the menu.

| STATE | SETTING | DESCRIPTION | OPTIONS |
|----------|-----------------------|---|---------|
| ACTIVE | Click Tracking | Overwrites every link to track every click in emails. | ^ |
| OFF ON | | Overwrites every link to track clicks in emails. | x ✓ |
| | | <input checked="" type="checkbox"/> Enable click tracking in plain text emails | |
| INACTIVE | Google Analytics | Track your conversion rates and ROI with Google Analytics. | v |
| ACTIVE | Open Tracking | Appends an invisible image to HTML emails to track emails that have been opened. | ^ |
| OFF ON | | Turn on to enable open tracking. | |
| INACTIVE | Subscription Tracking | Adds unsubscribe links to the bottom of the text and HTML emails. Future emails won't be delivered to unsubscribed users. | v |

- 2) Enable **Click Tracking**. Check the checkbox **Enable click tracking in plain text emails** as well.
- 3) Enable **Open Tracking**.
- 4) Click **Mail Settings** in the main menu and then click the down arrow after **Event Notification**.



ACTIVE Event Notification Controls notifications for events, such as bounces, clicks, and opens.

OFF ON

CONFIGURATION ✕

You can utilize our Event Notification framework to gather the data required for the most detailed reporting. If you need more assistance, please see our [Event Notification documentation](#).

Please note: If the open and click tracking apps are not enabled, the open and click events will not be posted.

HTTP POST URL

https://www.yoursite.com/slpw/plugin_sendgrid/sghandler.php

INTEGRATION TESTING TOOL

Use this tool to verify the integration prior to saving your settings.

[Test Your Integration](#)

SELECT ACTIONS

Select which actions you would like reported back to your system.

| | |
|---|---|
| <input checked="" type="checkbox"/> All | <input checked="" type="checkbox"/> Opened |
| <input checked="" type="checkbox"/> Processed | <input checked="" type="checkbox"/> Clicked |
| <input checked="" type="checkbox"/> Dropped | <input checked="" type="checkbox"/> Unsubscribed From |
| <input checked="" type="checkbox"/> Deferred | <input checked="" type="checkbox"/> Mark as Spam |
| <input checked="" type="checkbox"/> Delivered | <input checked="" type="checkbox"/> ASM Group Unsubscribe |
| <input checked="" type="checkbox"/> Bounced | <input checked="" type="checkbox"/> ASM Group Resubscribe |

- 5) Set the **HTTP POST URL** to the following URL (using your domain of course)

http://www.yoursite.com/slpw/plugin_sendgrid/sghandler.php

- 6) Enable all of the **Select Action** checkboxes.

- 7) Click **API Keys** in the main menu. Enter an **API Key name** such as

Create API Key

API Key Name •
Sitelok access ⓘ

API Key Permissions • ⓘ

- Full Access**
Allows the API key to access GET, PATCH, PUT, DELETE, and POST endpoints for all parts of your account, excluding billing.
- Restricted Access**
Customize levels of access for all parts of your account, excluding billing.
- Billing Access**
Allows the API key to access billing endpoints for the account. (This is especially useful for Enterprise or Partner customers looking for more advanced account management.)

Sitelok access and click **Full Access**.

- 8) Click the **Create & View** button to display your API Key which you should copy to the clipboard as we will need this later.
- 9) Although optional we recommend setting up Sender Authentication in your Sendgrid account to improve deliverability. You can find this option in the Sendgrid settings. Follow their instruction to set that up.

Setting up the plugin

- 1) Login to the Sitelok control panel and go to **Plugins - Sendgrid**. If you don't see the settings click the **Sendgrid settings** button.

Sendgrid Dashboard > Sendgrid

Sendgrid settings

Sendgrid API Key

SG.j4378evhf4reb24tg32y89et43v8t7eww34gjp45f2ghey74bhwhu

- 2) Paste in your Sendgrid API Key
- 3) Choose a custom field to store the bounce or complaint flag in. If you use the Email Unsubscribe plugin (highly recommended) then choose the same custom field as used in that. This way you can automatically block emails being sent to flagged addresses.
- 4) Choose whether to flag only permanent bounces or temporary ones as well (temporary bounces are called deferred by Sendgrid).

Flag bounces & spam complaints

Flag in the following field

Bounce types to flag

- 5) Select which email actions to log as individual log entries in the log. In Sitelok V5.5 or above you can still see the status of sent emails in the log (delivered opened, clicked etc) even if you don't log these events individually, but its best to leave all the checkboxes checked anyway. To see stats about specific links being clicked you must have the Clicked checkbox checked.

Email activity logging

Processed

Dropped

Delivered

Opened

Clicked

Temporary bounce

Permanent bounce

Spam complaint

Disabling the Plugin

To disable the 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 Using the plugin

Once setup Sitelok will automatically use the plugin to send emails via the Sendgrid system.

Viewing the status of sent emails

In Sitelok V5.5 or above you can see the status of each sent email in the log or users recent activity. This is displayed after the email subject in the details column.

| Username | Type | Details |
|----------------|-------|-------------------------------------|
| joe@bloggs.com | Email | New product release (opened) |
| fred@yahoo.com | Email | Password reset (opened and clicked) |

processed

Accepted by Sendgrid and being processed

dropped

Rejected by Sendgrid (invalid email etc)

delivered

Delivered to the recipients mail server

opened

Opened by the recipient. Note that tracking if an email has been opened can not be 100% accurate

as it depends on the mail client privacy settings.

Emails marked as delivered may also have been opened.

opened & clicked

The recipient has clicked a link in the email. This of course also means the email was opened. Clicks can be detected even if open tracking cannot.

temporary bounce

The email has currently not been delivered but Sendgrid will retry. Sendgrid refer to the emails as deferred.

permanent bounce

Permanently bounced.

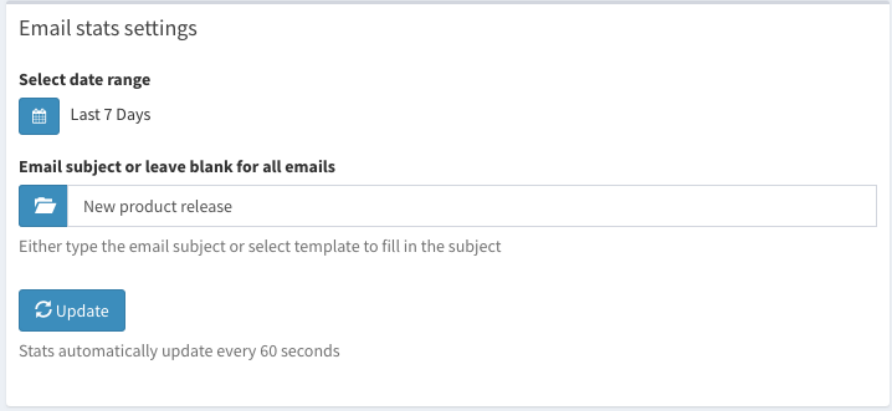
spam complaint

The user has reported the email as spam

In earlier versions of Sitelok you can see the status from the individual log entries for each email event. The events logged are set in the plugin settings which you can access by going to **Plugin - Sendgrid** and clicking the **Sendgrid settings** button at the bottom of the page.

Email statistics

The main Sendgrid plugin page shows statistics about emails sent for a certain period. This can be for all emails or for a certain email subject allowing you to track specific email campaigns.



The screenshot shows a form titled "Email stats settings". It includes a "Select date range" section with a calendar icon and the text "Last 7 Days". Below that is an "Email subject or leave blank for all emails" section with a folder icon and a text input field containing "New product release". A note below the input field says "Either type the email subject or select template to fill in the subject". At the bottom of the form is a blue "Update" button with a refresh icon, and a note stating "Stats automatically update every 60 seconds".

To set the stats you want to see enter email subject for a specific email or leave blank for all emails. You can click the folder icon to choose an email template to fill in the subject for you if you prefer. If the email subject contains template variables such as `!!!username!!!` these will be treated as wildcards so that the email subject is still matched.

Select the date range you are interested in and click the Update button to generate the stats. These will be refreshed every 60 seconds while the page is opened too.

The **Stats for emails sent** table shows the total number of emails with each status along with the percentage of the total emails sent. This information is available even if individual email events are not logged.















| | |
|-----------|--|
| Sent | Emails sent by Sitelok |
| Processed | Emails accepted by Sendgrid |
| Delivered | Emails delivered to the recipients mail server |
| Opened | Emails opened by the recipient. Note that tracking if an email has been opened can not be 100% accurate as it depends on the mail client privacy settings. Emails marked as delivered may also have been opened. |

Chapter 3 - Using the Plugin


| | |
|------------------------------|--|
| Clicked at least once | Emails where the user has clicked at least one link. |
| Temporary bounce | Emails that have bounced but may still be delivered. |
| Permanent bounce | Permanently bounced. |
| Dropped | Emails rejected by Sendgrid (invalid emails etc) |
| Spam compliant | Emails reported as spam |
| Not processed | Emails not processed (total sent minus total processed). |
| Not delivered | Emails not delivered (total sent minus total delivered) |
| Delivered not opened | Emails delivered but not opened (total sent minus total opened or clicked) |
| Delivered not clicked | Emails delivered but not clicked (total sent minus total clicked) |

Stats for emails sent


Click the  icon to select users for the event






| Status | Total | % of total |  |
|---------------------------|-------|------------|---|
| Sent | 2870 | 100.0% |  |
| Processed | 2858 | 99.6% |  |
| Delivered | 2815 | 98.1% |  |
| Opened | 963 | 33.6% |  |
| Clicked at least once | 236 | 8.2% |  |
| Temporary bounce | 0 | 0.0% |  |
| Permanent bounce | 43 | 1.5% |  |
| Dropped | 12 | 0.4% |  |
| Spam complaint | 1 | 0.0% |  |
| Not processed | 12 | 0.4% |  |
| Not delivered | 55 | 1.9% |  |
| Delivered but not opened | 1852 | 64.5% |  |
| Delivered but not clicked | 2579 | 89.9% |  |

Chapter 3 - Using the Plugin

Next to each statistic you will see a user icon  which can be clicked to select all the applicable users. This is really useful if you want to email users again or export them for further processing. If you have the Maintenance plugin installed you could, for example, add a note to a custom field for the selected users.

The **Clicked links** table shows the total number of links clicked and the total unique (by user) number of links clicked. Each individual link URL clicked is also shown along with the total times it has been clicked and the unique clicks total (by user). Special Sitelok links such as View email in browser, password activation etc are shown as text rather than a URL to be clearer.

Next to each link you will see a user icon  which can be clicked to select all all the user who clicked that link. This is really useful if you want to email those users again our process them in some other way. If you have the Maintenance plugin installed you could, for example, add a note to a custom field for the selected users.

| Total clicks | Unique clicks | Link clicked |
|--------------|---------------|---|
| 222 (66.3%) | 172 (63.2%) |  https://www.yoursite.com/products/moreinfo.php |
| 27 (8.1%) | 23 (8.5%) |  https://www.yoursite.com/contact.php |
| 24 (7.2%) | 24 (8.8%) |  https://www.yoursite.com/index.php |
| 18 (5.4%) | 15 (5.5%) |  View email in browser |
| 26 (7.8%) | 21 (7.7%) |  Email unsubscribe |

Chapter 4 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