Digital Experience Cloud

Episerver Campaign

User Guide

for all countries except DACH-countries

epi

Table of contents

Basics

The Basics section shows Episerver Campaign features and upgrade options of software and services.

- **Introduction**. Introduction to this document and information about the security functions.
- **Getting started**. Learn more about Episerver Campaign and create a campaign.
- **Logging in**. Work with the Episerver Campaign user interface, including logging in and out.

  - **Menu bar**
  - **Start menu**
  - **Campaign lists**

- **Users**. Set up user accounts and permissions.

  - **Permissions**
  - **Roles**

- **Clients**. Layout of the Episerver Campaign working environment.
- **Deliverability basics**. Information and best practices for a successful deliverability of emails.
- **Exclusive IP addresses**. Information on dedicated IP addresses.
- **ISO 27001 certification**. Gives you the guarantee that Episerver's safety management for operation, service and development of email marketing platform complies with internationally recognized standards regarding data and information security.
- **Service description**. Overview of standard functions and upgrade options.

Introduction

Online help describes the features and functionality of the **Episerver Digital Experience platform** and covers CMS for content management, Commerce for e-commerce functionality, Campaign for omnichannel campaigns, Find for extended search, Insight for visitor profiles and customer segments, Perform and Reach for personalized product recommendations, and Episerver add-ons.

You access the online help from within the Episerver platform or from **Episerver World**. The online help is also available in PDF format for users who prefer PDF or want to print the documentation.

This PDF describes the features and functionality of Episerver Campaign, which you can find on **Episerver World**. Developer guides and technical documentation also are found on **Episerver World**.

The user guide is intended for editors, administrators, marketers and merchandisers, working with tasks as described in Roles and tasks.
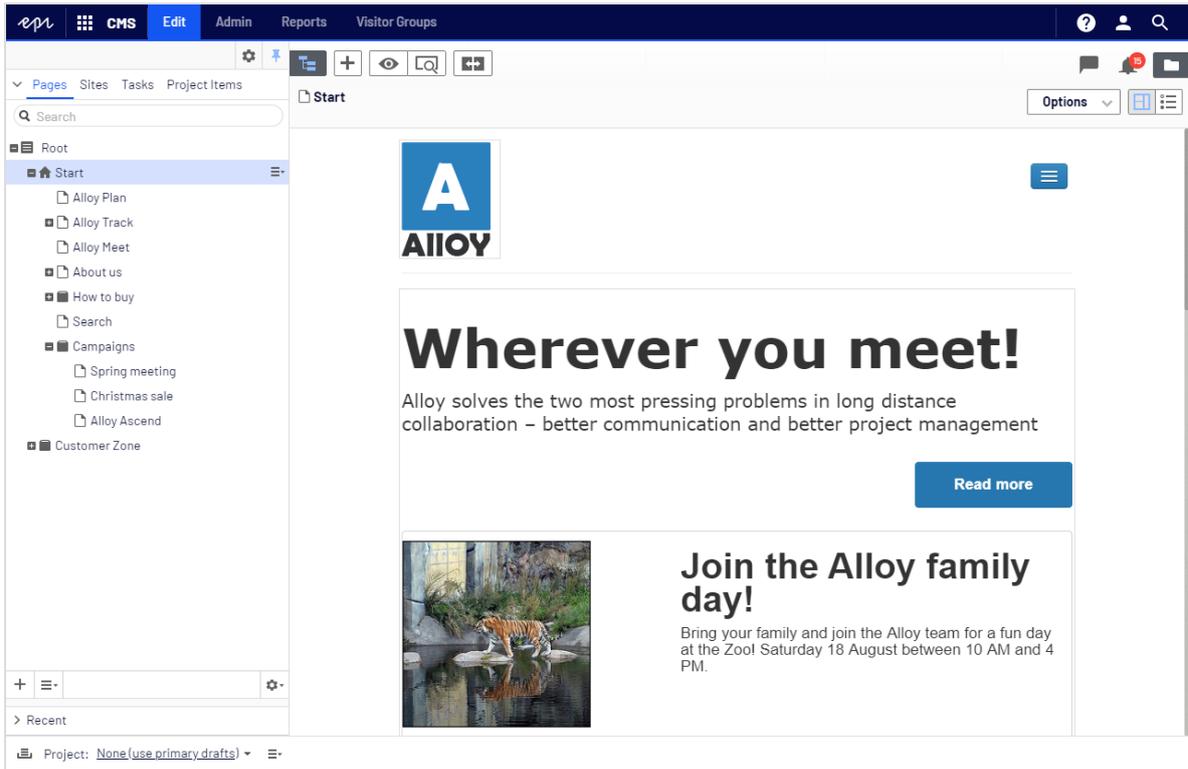
Features, licenses and releases

The user documentation is continuously updated and covers the latest releases for the Episerver platform.

Episerver CMS is the core part of the Episerver platform providing advanced content creation and publishing features for all types of website content. CMS features are available in all Episerver installations.

Episerver Commerce adds complete e-commerce capabilities to the core functionality in CMS. It requires a specific installation and license.

Episerver Campaign lets you orchestrate omnichannel campaigns from a single screen, and send triggered emails based on real-time behavior. Campaign requires additional license activation.

Episerver Find adds advanced search functionality to websites. It requires a specific installation and license.

Episerver Insight is a user interface for viewing and filtering visitor profiles, and creating customer segments that can be used in omnichannel marketing campaigns. It requires a specific installation and license.

Product Recommendations lets you create and configure a merchandising campaign with personalized product recommendations from the personalization portal. It requires a specific installation and license.

Email Recommendations lets you include personalized product recommendations in any email, including cart abandonment and retargeting emails, from the personalization portal. You can also work with behavioral triggers to detect on-site behaviors and act upon them through automated, personalized emails. It requires a specific installation and license.

Add-ons extend the Episerver capabilities with features like advanced search, multi-variate testing, and social media integration. Some add-ons are free, others require license activation. Add-ons by Episerver are described in the online help.

Note: Due to frequent feature releases, this user guide may describe functionality that is not yet available on your website. See **What's new** to find out in which area and release a specific feature became available.

Images and screenshots

The Episerver user guide uses images and screenshots to visually guide you through the features of the Episerver platform. Due to different versions, continuous updates, and specific system permissions, images and screenshots may differ from the actual appearance.

Notes

Three types of notes are color marked throughout the user guide: tips, notes and warnings.

Tip: Green indicates tips that might show you an easier way to perform a task.

Note: Yellow indicates important information that may affect your work and should not be missed.

Warning: Red indicates warnings. If these warnings are ignored, serious errors or problems may occur.

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What's new?

This user guide describes functionality available in the latest release of a standard implementation of the Episerver platform software and services. New features are continuously made available, see **Episerver updates**.

> **Note:** Due to frequent feature releases, this user guide may describe functionality that is not yet available to you. Contact your system administrator for information about products and versions in your Episerver implementation.

This release of the Episerver User Guide describes features available in Episerver as of **November 28, 2019**, see release notes below for update history. See Archived documentation in the online version of the user guide for previously released user guides.

Release notes

Released	Area	Features and updates
November 28, 2019	Commerce	From the **Orders** tab of the Contact Details screen, you can view a customer´s order history. (**update 290**) The Order and Cart Details screens were redesigned to more closely resemble Commerce Manager and make them easier to use. (**update 291**)
	Campaign	You can create coupon codes of type Code 128

Released	Area	Features and updates
		bar code or Interleaved 2 of 5 bar code by using the coupon system.
November 6, 2019	Campaign	You can export event data (for example, clicks and opens) in real time via webhooks. ([update 290](#))
October 24, 2019	Commerce	Support for updating order management and shipment statuses on the Order Management screen. ([update 286](#))
October 17, 2019	Campaign	In lists that support multiple selection, the new **Sort by selection** button lets you sort selected items to the top of the list.
October 11, 2019	Commerce	On the Order Management screen, you can change a cart's **Market**, and an order's **Market** and **Currency**. ([update 284](#))
	Marketing Automation connectors	Support for multiple instances of a connector, to use in separate regions. See Episerver Microsoft Dynamics CRM. ([update 284](#))
October 4, 2019	Personalization	The Personalization Portal is the user interface for accessing Product Recommendations and Email Recommendations features. The Personalization Mail recommendations can export and import email campaigns.
September 25, 2019	Campaign	The Performance Dashboard (Beta) now has the additional chart type Basic chart (mailing-based). Use the new hamburger menu within the widgets to export charts. In the Deliverability preview (Beta), the **Spam**

Released	Area	Features and updates
		suspicion tab displays the spam score and further information on the spam filters for individual clients. Notes on spam filters of each client have been added to the documentation. A step-by-step guide for Smart Campaigns has been added to split dispatch. A definition of the mailing types that can be selected in Deep Analytics reports and action-based target group filters has been added. Inline Editing lets you edit the texts of your mailing template directly in the mailing preview.
September 5, 2019	CMS	The CMS user interface has been rebranded. The screenshots have been updated to reflect this. (update 274)
	Commerce	Order meta-classes and fields appear on the Order Management screen. Several updates to the Order Management screen, including the ability to choose a market before selecting a cart, and the ability to create a new cart. (update 279)
	Campaign	Use the new **Structured data** tab in the General settings paragraph in the Template Kit to add structured data to your mailing. Add content in the **Gmail Promotions tab** section that Gmail should prominently display in the Gmail Promotions tab.
	Marketing Automation	New global settings for Marketing Automation connectors. Change to Microsoft Dynamics CRM connector configuration screen (**Domain** is out; **Region** is in), and **Organization** name can be the Unique name or the friendly name.

Released	Area	Features and updates
August 21, 2019	Campaign	The deliverability preview lets you check your mailing before dispatch, whether the contents are displayed correctly and whether your mailing has been classified as spam by the most popular email providers. In the Performance Dashboard, you can display KPIs as a bubble chart. (update 278)
	Insight	Visitor groups was added to the filter types for viewing profiles.
August 7, 2019	Campaign	The IP warming topic provides information about how to build a good reputation with internet service providers as an email sender.
July 24, 2019	Campaign	In the recipient history, you can view the third-party ID, the pseudonymized recipient ID. See Recipient history. (update 274) In the Basics section, you can find the new Deliverability basics section with information and best practices for successful deliverability.
July 10, 2019	Forms	The form element types **Rich text** and **Submit button** can now be dependent on other fields, which means they can be displayed or hidden depending on a visitor's previous input. See Dependencies tab in Form element types. (update 269)
	Commerce	The Order Management screen lets you convert any cart to a purchase order and accept payments. See Order Management screen. (update 271)

Released	Area	Features and updates
	Campaign	If you are using Spryker as an e-commerce platform, you can integrate Episerver Campaign to connect e-commerce and mailing activities. See Spryker integration. Added menu entries Episerver Insight and Episerver Reach to Campaign start menu.
June 13, 2019	CMS	An administrator can require a review requester to add a comment when sending an item for review. See Managing approval sequences and Collaboration. (update 265)
	Campaign	The Episerver Campaign User Guide is a section in the Episerver User Guide.
	Marketing Automation connectors	Support for multiple instances of a connector, to use for example in separate regions. See Episerver Pardot and Episerver Marketo. (update 244)

Archived documentation

If your Episerver implementation is not on the latest version, you can access previous versions of the Episerver User Guide under Archived documentation in the online version of the user guide.

Getting started

This topic introduces Episerver Campaign and explains how to get started with simple campaigns and mailings, to get a basic understanding of campaign management. The information is intended for users that are new to marketing and Episerver Campaign.

What is a campaign?

In Episerver Campaign, a campaign is the structure, relations, and process flow of elements like *recipients*, *email message*, and actions like *wait* or *limit*. With **Smart Campaigns**, you can easily create and visualize one-shot-campaigns using drag-and-drop functionality.
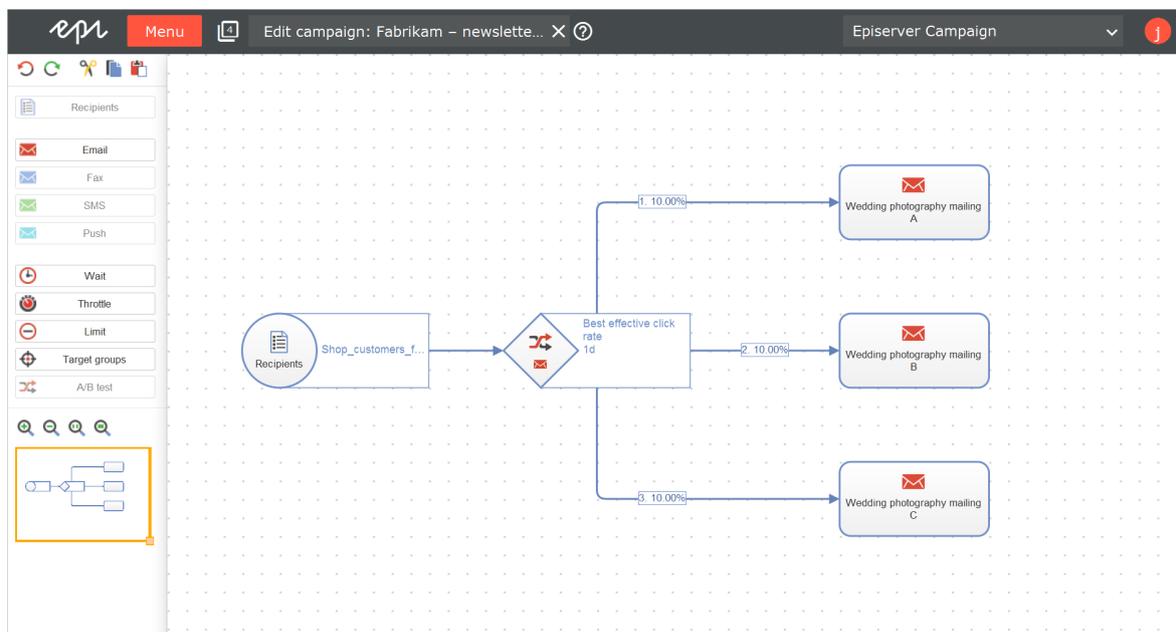
Setting up Episerver Campaign

Episerver Campaign is a **service** set up by Episerver. The onboarding setup involves configuring one or more **clients**, adapted recipient lists, and a feature set depending on your service contract. Furthermore, your marketeers will get **user accounts**, including personalized permission setups.

To send emails via Episerver Campaign using the sender domain of your hosted website or online shop, see **Setting up your domain for Episerver Campaign** on Episerver World.

When the setup is done, you can **log in to Episerver Campaign** and start creating campaigns.

Campaign preparations

Usually a campaign is preceded by significant preparations. You need to plan the message, the target groups, the channels to use, and revenue goals if any. Use the Smart Campaign feature to visualize the different steps in your campaign. Creating landing pages in Episerver CMS may also be part of the preparations, as well as preparing associated products, if you have Episerver Commerce.

If you use other analytic tools for monitoring campaign performance, KPIs (key performance indicators) for these may need to be configured for the specific campaign.

You can tailor campaign messages for selected target groups, to create a more engaging experience and increase conversion. Use visitor groups in Episerver CMS, to personalize campaign content. With Episerver Reach, you can also configure mailings to trigger on certain recipient actions.

Campaign basics

Smart Campaigns is a powerful tool for visualizing the campaign flow, and orchestrating messages, channels and actions. A message can be distributed using multiple channels. Email is the most common, but you can also use, for example, SMS and push messages.

These are the fundamentals of a mailing:

- **Recipients**. The target group for the campaign message mailing.
- **Email**. The content message with conversion links leading to desired actions.
- **Campaign**. The elements and actions required to distribute the message.
- **Analytics**. The tools to monitor and follow-up on campaign performance.

When working with mailings, it is important to consider best practices regarding deliverability, to ensure high delivery and opening rates for your campaigns.

Campaign process flow

Below is an example procedure when preparing and launching a campaign with Episerver Campaign.

1. Recipient data. Define your message audience from recipient lists. These are pre-configured during the setup process, and usually get their data by imports or form collections. Ensure your recipients have given a consent for receiving mailings with advertising content.
2. Email message. Create the email design and content. Use a copy of an existing mailing, the Template Kit delivered with Episerver Campaign or your own layout.
3. Personalize your campaign messages for selected target groups, to create a more engaging experience and increase conversion.
4. Create the campaign using the Smart Campaigns flow visualization. You can update the campaign as needed, when working with the associated elements.
5. Test mailing. Test and validate email design and content, send out mailing to selected test recipients.
6. Start campaign. Activate and send the campaign to launch a full sendout on time, monitor statistics, bounces and replies.
7. Analyze result. Evaluate campaign KPIs, visualize click-tracking, and generate reports.
8. Post-launch work. clean-up recipient lists, manage blacklists, and returned emails.

Many campaign elements can be reused in future campaigns, thereby reducing the amount of preparation work, and speeding up the creation process.

Creating a simple campaign

In this scenario we assume that we have a website with Episerver CMS and Commerce, and want to make customers aware of our upcoming "Fall Fashion" sales. We have prepared a set of content, products in Commerce and a landing page in CMS. These associated content items have been scheduled to be published just before the email, with links to the landing page, is sent out.

We will create a simple mailing campaign with a recipient list, and an email message. We will test the mailing and launch it, and then follow-up on the result.

1. Create the campaign structure.
   a. Select **Smart Campaigns** in the Campaign section of the start menu. In the next window, click **Create** and select **Empty draft**. Confirm by clicking **Apply**.
   b. Drag and drop the **Recipients** node into the campaign area, and select a recipient list.
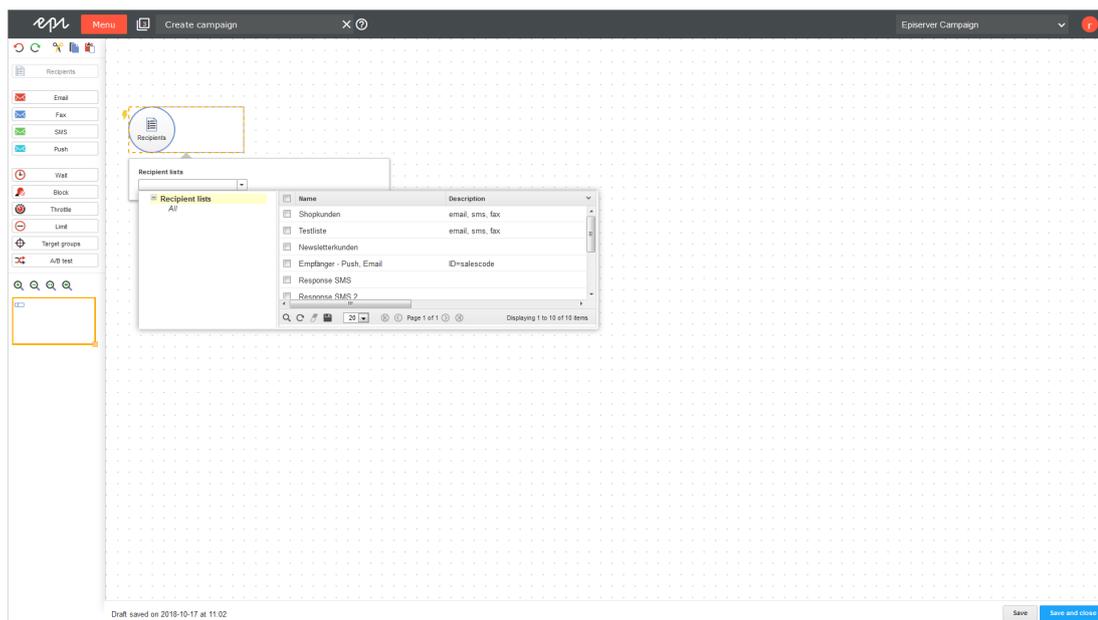
   c. The campaign can be of different types depending on channels. To add an email message, drag and drop an **Email** node into the campaign area, and give it an intuitive name.
   d. Connect both nodes and click **Save**. Give the campaign an appropriate name and click **Save** in the validation dialog box. This will display missing details, if any. As long as the validation finds missing details,

the campaign will be stored in *Incomplete* state.
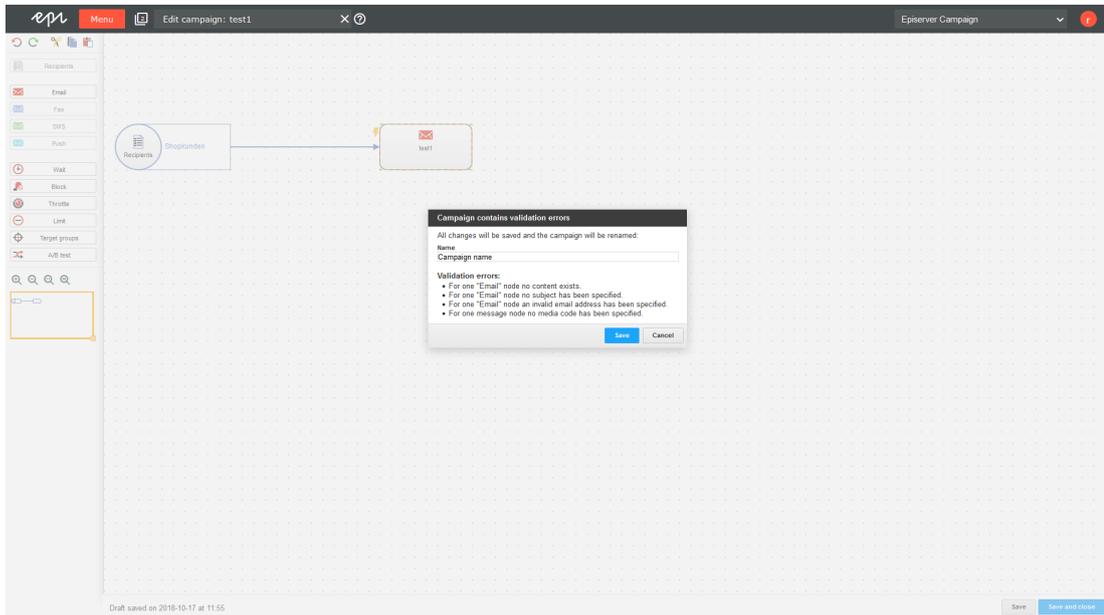
2. Adapt the email message.

   a. In the campaign area, select edit for the **Email** node, and click **Edit content**. Select a template in the displayed list, to use for the mailing, and click **Next**.

   b. To modify the sender and subject, click <u>Sender, subject, attachments</u> to the upper left, update the information in the section to the right, and click **Apply**.

   c. To <u>adapt content – text, images and links</u>, click on a paragraph's name and update it in the right area, then click **Apply**.

   d. To add images via a Text/Image paragraph, select the tab **Image** and upload the file. You can also add assigned links. Links in the message will automatically be included in the default tracking, to follow-up on clicks and page openings when the campaign has been launched.
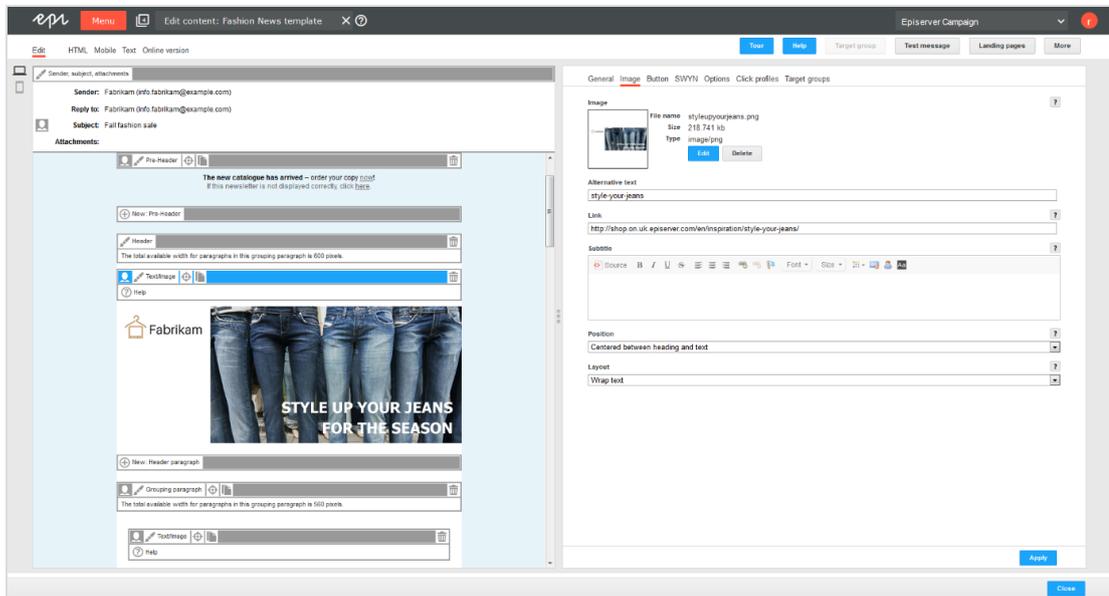
e. You can preview the output using different options in the top menu, for example **Mobile** or **Online version**.

3. Test the email message prior to launch.

   a. The mailing can be tested using predefined test users. Click **Test message**, select a test group, or individual recipients, and click **Send email**.
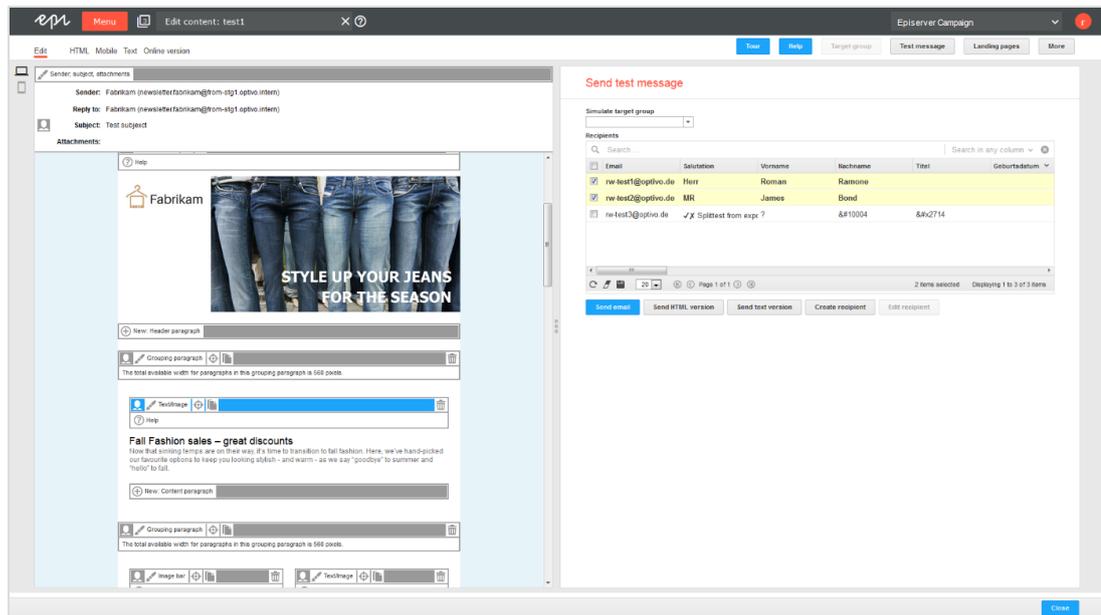
b. You can also send HTML-only or text versions. <u>Test messages</u> can also be sent from the message node in the campaign area, or from the <u>Smart Campaigns overview</u>.

4. Launch the campaign.

When all message items are correctly configured, and you are comfortable with the incoming test emails, you can launch the campaign. Campaigns must be activated before they can be started. Campaigns with a specified sending time are sent automatically once activated.

a. Save the campaign, and go to **Campaigns** > **Smart Campaigns**.

b. Select the campaign in the list and click **Activate**. The campaign and all associated elements will receive the status *Activated*.

c. To start the campaign, click **Start**, and **Start campaign** to confirm. The sending of the mailing to the associated recipient list starts, and the campaign status changes to Sending. When completed, the status changes changes to *Sent*.
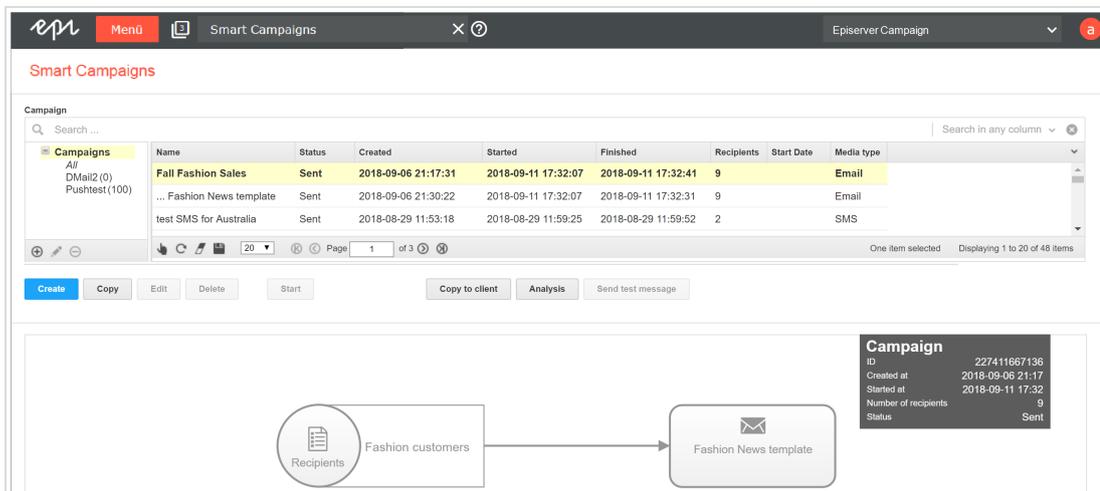
5. Analyze the results (example reports)

After sending, you can begin monitoring the campaign to see how many emails were opened, number of clicks on links, and bounce rates. You can create reports, and visualize links clicked in the email message.

a. Go to **Smart Campaigns** in the Campaign overview, select the campaign, and click <u>Analysis</u> to see a result summary including rates for bounces, clicks and opened emails.
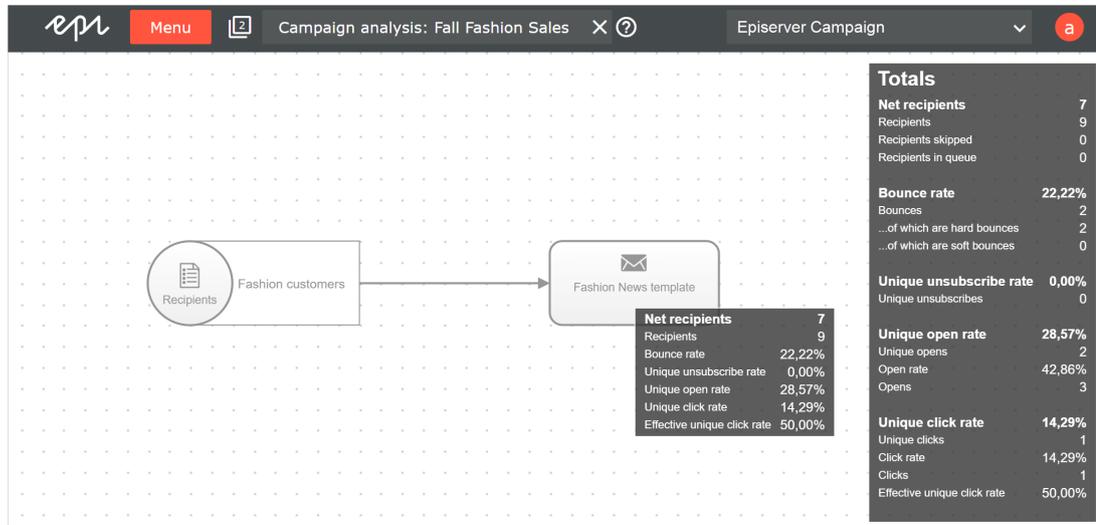
b. With **Deep Analytics** you can generate reports with your KPIs. Reports can be created manually or automatically. You can use existing report templates, or create your own.
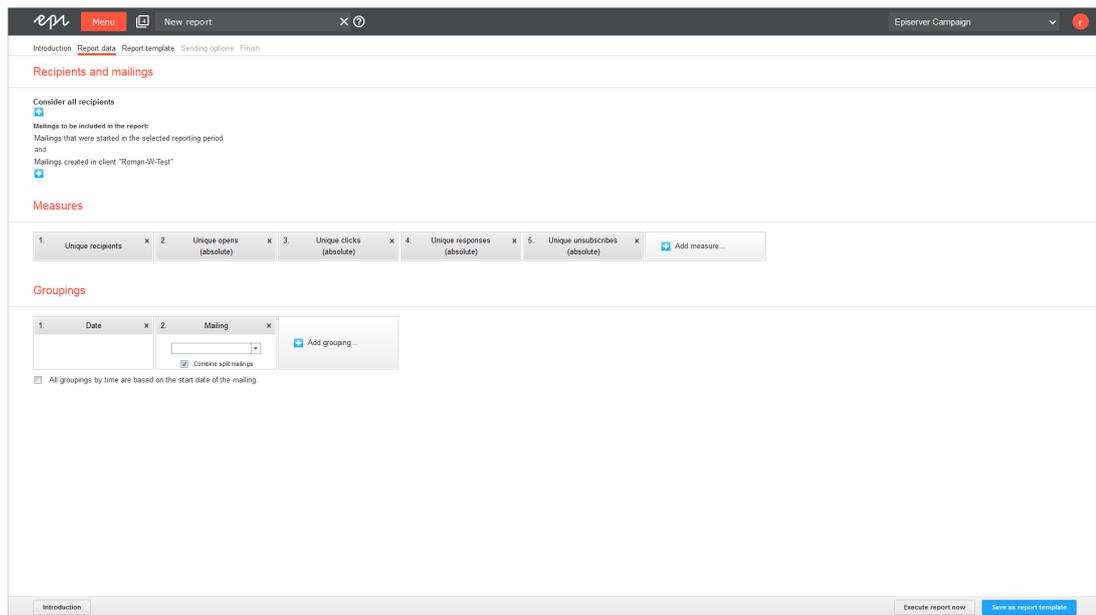
c. You can visualize clicked links as heat maps in the message. The image can be saved, for inclusion in reports. Select **Visual link analysis** under **Analytics** to access this feature.
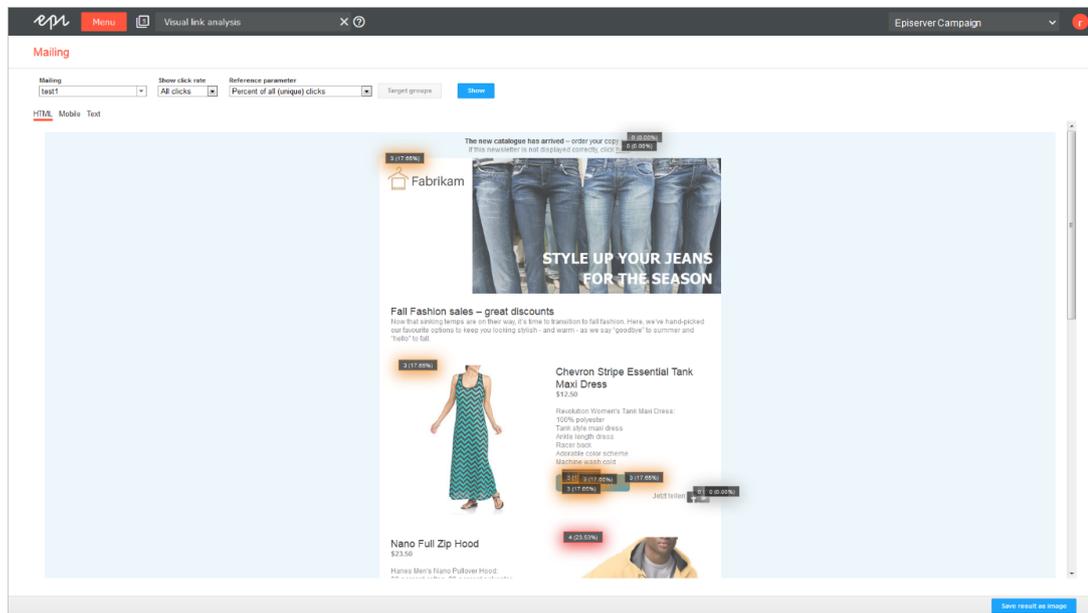
More features – next steps

There are many more features in Episerver Campaign that you can work with to further extend, automate, and optimize your campaigns. Below are a few examples.

- A/B test. Optimize your message by sending variants of an email, and comparing key figures to determine which one works the best.
- Send time optimization. Customize the sending time of your mailing, automated for each individual recipient, to increase the chances of the email being opened.
- Template Kit. Use your corporate design styles and turn these directly into mailings, without any special knowledge of graphic design or composition.
- Marketing Automation. Create multi-step campaigns with action and event-based mailings by using the drag and drop graphical interface.
- Target groups. Define the recipients of your campaigns by specific rules and conditions, and personalize the mailing content.
- Click profiles. Define recipient groups based on click behavior in previous mailings.
- Recipient history. Analyze the entire timeline of individual recipients, to see which messages you have sent to whom, and in which format.
- Personalization. Customize text and images for selected target groups, to create a more engaging experience and increase conversion.

Log in and out

First login

> **Note:** Before your first login, activate your account by referencing two emails from Episerver: an activation email containing your personal activation key and a second confirmation email.

1. Open the activation email and click **Activate user account**.
2. Enter the activation key provided in the second email, then click **Continue**.
3. Complete the fields and click **Continue**.
4. Create a password and a PIN and click **Save**.

    After you complete the entries, you receive another email asking you to confirm your activation.

5. In that email, click **Confirm activation**.

    You can now log into Episerver Campaign at http://www.campaign.episerver.net/.

Login

Use the login screen to verify your identity and prevent malware intrusion.

1. Go to www.campaign.episerver.net.
2. Enter your user name and password.
3. Into the row labeled **PIN**, enter digits of your PIN in the open positions by clicking numbers on the onscreen keyboard.

    > **Note:** The virtual keyboard's numbers are in random order.

    For example, if your PIN is **123456** and the login screen appears as below, enter **1** into the first position (from the left) and **3** into the third position. Notice that positions 2 and 4-6 are filled with black dots, indicating you do not need to enter those characters.

4. Click **Log in**.

If your browser or the network from which you are accessing Episerver Campaign does not support SSL, contact **customer support**.

If you forget your user name, password or PIN, contact the person at your company from whom you received your login data or Episerver **customer support**.

Logging out

End each session by clicking **Logout** to prevent third parties from accessing the system.

 ## Menu bar

The menu bar lets you navigate Episerver Campaign.

- **Menu**. Click **Menu** to open the [Start menu](#).
- **Window chooser**.

  - A stack icon displays the number of open windows.
  - A drop-down list lets you choose among open windows.

> **Note:** Do not use the forward and back buttons in your browser because any unsaved work may be lost; use the window chooser to navigate among windows.

- **Help**. To access context-sensitive help in the Episerver User Guide, click .
- **Change client**. A drop-down list lets you switch among clients set for your account.

- **Profile area**. Click the red circle with your initial to manage user settings, such as the following:
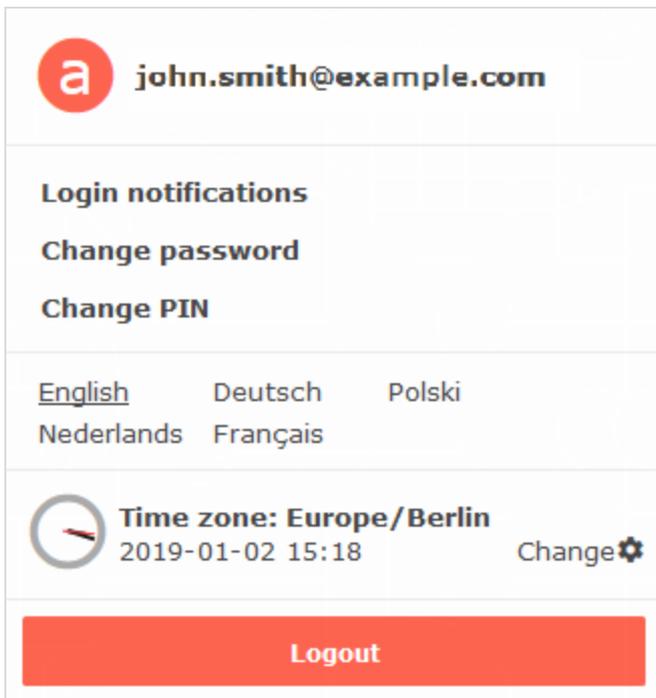
- ○ Click **Login notifications** to enable or disable login notifications, which inform you about login attempts.
- ○ Click **Change password** to change it. An email confirmation is sent to you.
- ○ Click **Change PIN** to change it. An email confirmation is sent to you.
- ○ Click the displayed language to change it to German (Deutsch), English, Dutch (Nederlands), Polish (Polski) or French (Français).

> **Warning:** Save your work before changing the language. Unsaved changes are lost if you change the language of Episerver Campaign.

- ○ Click **Change** next to the time zone to change it. Select a time zone from the drop-down list.

> **Note: System time**
>
> If the time zone support is *not* activated in your client, the profile area shows the system time of the Episerver data center. This corresponds to central European time (CET), which may be different from time at your location.
>
> For example, if you are in London (one hour behind CET) and set a dispatch time of 17:00, then Episerver Campaign sends the message at 18:00 your

time. On the other hand, if you are in Istanbul (one hour ahead of CET) and set a dispatch time of 17:00, Episerver Campaign sends your message at 16:00 your time.

Also, daylight savings time may vary by an additional hour compared to your time zone.

Dates are entered in the format YYYY-MM-DD and correspond to the ISO 8601 international standard. Example: 15th May 2017 is displayed as 2017-05-15.

Warning: Save your work before logging out. Unsaved changes are lost when you confirm the logout.

- Click **Logout** to end your session.

Start menu

The start menu groups related areas as an overview. To return to the start menu at any time, click **Menu**.

Note: Start menu features are based on your user account, the package, and your permissions.

- **Campaigns**. Tools for creating campaigns, Smart Campaigns, Marketing Automation, and so on.
- **Recipients**. Manage your recipients and target groups.
- **Returned emails**. Manage and act upon direct replies from your recipients, auto-responders, and bounces.
- **Blacklist**. Manage recipients who no longer want to receive messages.
- **Analytics**. Access reporting tools.
- **Administration**. Manage user roles and permissions, your APIs, and field functions.
- **Special**. Access online help, and special features such as e-commerce integrations and the coupon system.
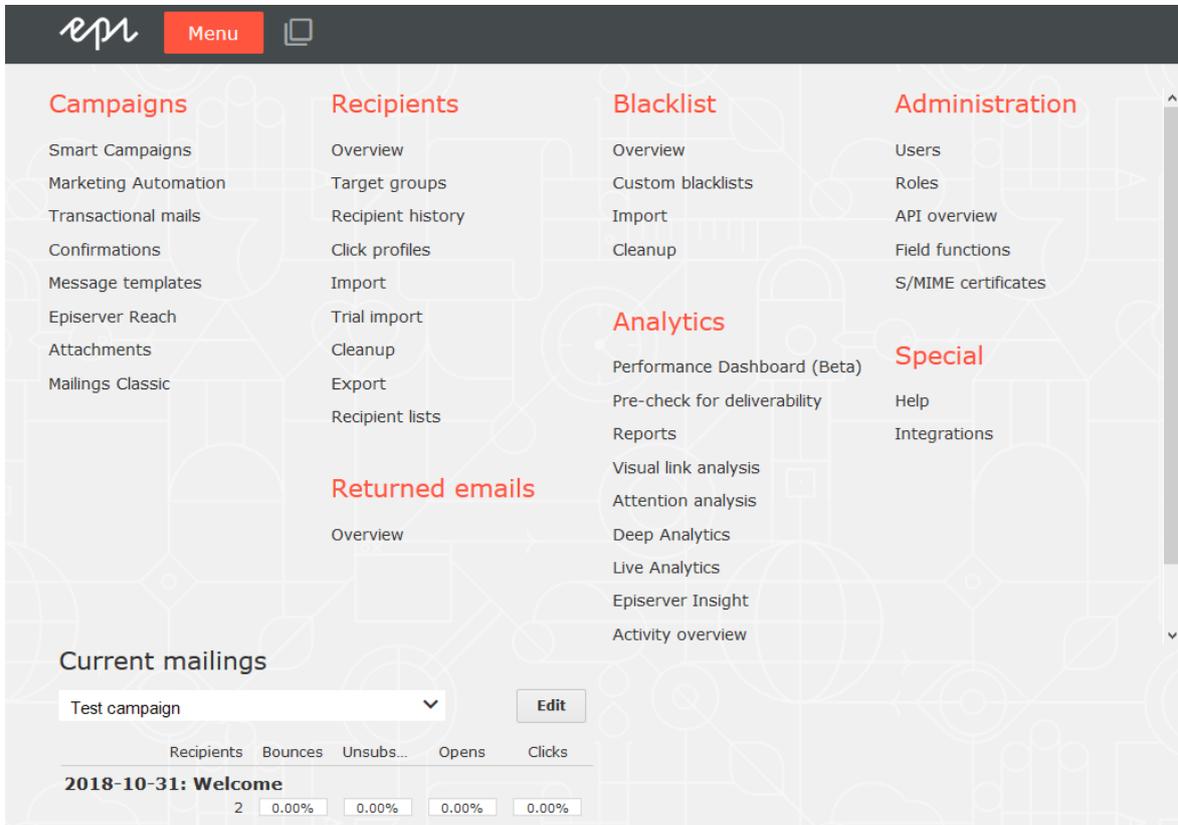
Current mailings

The **Current mailings** area provides quick access to the last four campaigns. Select any campaign and click **Edit**.
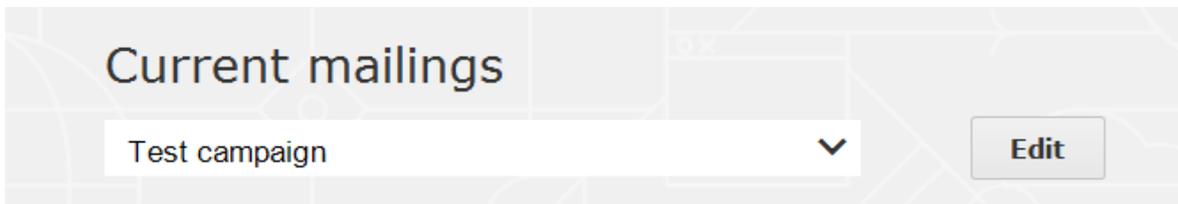
Below quick access to your recent campaigns, you find information about your last four mailings.

The following information is provided for each campaign:

- Number of recipients (49)
- Bounce rate (0.00%)
- Unsubscribe rate (0.00%)
- Opening rate (80.80%)
- Click rate (83.67%)

Lists

In many areas of Episerver Campaign, information is displayed in lists, such as mailings from **Campaigns** > **Smart Campaigns** or recipients from **Recipients** > **Overview**. All lists in Episerver Campaign work in the same way.

> **Note:** You need permission to display all records of a recipient list, returned emails list or blacklist list; otherwise, only the first 60 records appear.

A status bar at the bottom shows the number of elements on the page, the number of selected elements, and your current list position (for example, **Page 2 of 10**). By default, each page displays up to 20 elements, although this is adjustable. If a list has more than 20 elements, display other pages by clicking **Next** and **Previous** in the status bar.

Customizing the list view

- **Change column width**. Drag the separator between columns to change column width.
- **Show and hide columns**. Click the down arrow in the upper right corner to determine which columns appear.
- **Arrange columns**. Click a column header and drag the column to the desired position.
- **Sort elements**. Click a column header to change its sorting from ascending to descending order. Text fields are sorted alphabetically; numeric fields by value, date fields by date.

> **Tip:** If multiple selection is possible in a list and at least one element is selected,
> you can use the **Sort by selection** button to sort the selected elements to
> the top of the list .

Exporting records

To export records from a list to a CSV file, click **Download** in the status bar and select the destination folder.

> **Note:** To export recipients, returned emails, or blacklists, you need appropriate permission.

Opening CSV files with Microsoft Excel

> **Note:** Episerver Campaign creates CSV files in UTF-8 without BOM. Microsoft Excel incorrectly interprets the format as ISO-88591.

To correctly open a CSV file in Excel, follow these steps.

1. Open a blank Excel spreadsheet.
2. Click the **Data** tab.
3. Select **Get Data > From File > From Text/CSV**.
4. Select the file downloaded in **Export records** and click **Import**.
5. Set the **File Origin** to **Unicode (UTF-8)** and select **Semicolon** as **Delimiter**.
6. Click **Load**.

Updating lists

If several people are making changes to Episerver Campaign, you can update any list by clicking the Refresh button on the status bar.

Modifying elements

If you select an element, it is highlighted, indicating that you can edit or delete it.

- **Select multiple elements**. You can select multiple list elements if a check box appears next to each item and in the header.

- **Add element**. Many lists have a button to add elements, for example **Create recipient**. Click this button to create a new row. Click a field to enter data. Click **Submit** when finished. Each new data record is automatically sorted into its correct position.
- **Edit element**. Click **edit element** to modify it. Click **Submit** to save changes. You can also double click a row to edit it.
- **Delete element**. Click **delete element** to do that.

Printing lists

To print a list, click the printer icon in the status bar.

> **Note:** To print recipients, returned emails, or blacklists, you need appropriate permission.

Using folders

In some parts of Episerver Campaign, such as **Smart Campaigns** and target groups, a tree hierarchy appears to the left of a main list. The additional hierarchy lets you organize elements into folders.
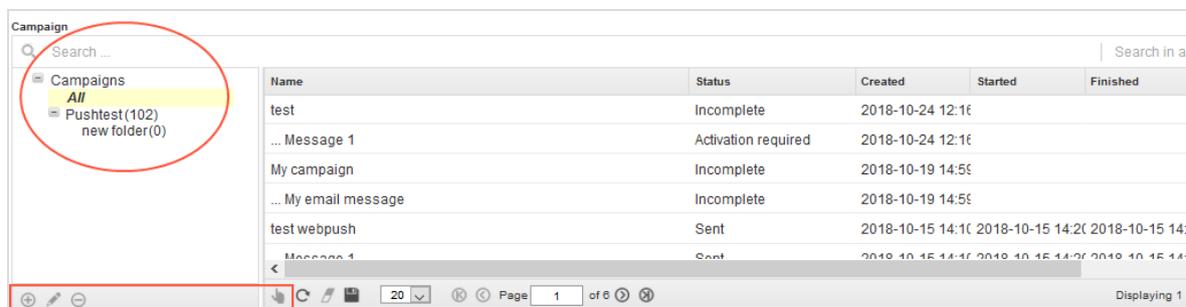
Drag or double click the separator bar between the two screen areas to show or hide the folders. If you hide them, the main list occupies the width of the screen.

Initially, the folder area contains only the **All** folder, a *meta- folder* showing existing elements. You cannot delete the **All** folder.

Each folder displays the number of elements in it; the number does not include subfolder elements.

- **Create new folder**. Click Add ⊕, enter a folder name, and click **Submit** ☑.
- **Delete folder**. Select the folder and click **Delete** ⊖.
- **Rename folder**. Select the folder and click **Rename** ✎.
- **Move folder**. Select a folder and drag it to the folder to which you want to move it.

- **Move one or more list elements to a folder**. Select an element, click **Move selection** 👆 and click the folder to which you want to move it.

Users

The user administration tool lets you set up and manage user accounts, and can grant user permissions. User permissions apply to clients and/or sub-clients. You can grant to the same user different permissions for different sub-clients (if sub-clients are being used).

To manage users, open the start menu and select **Administration** > **Users**. The **Manage users** window appears.
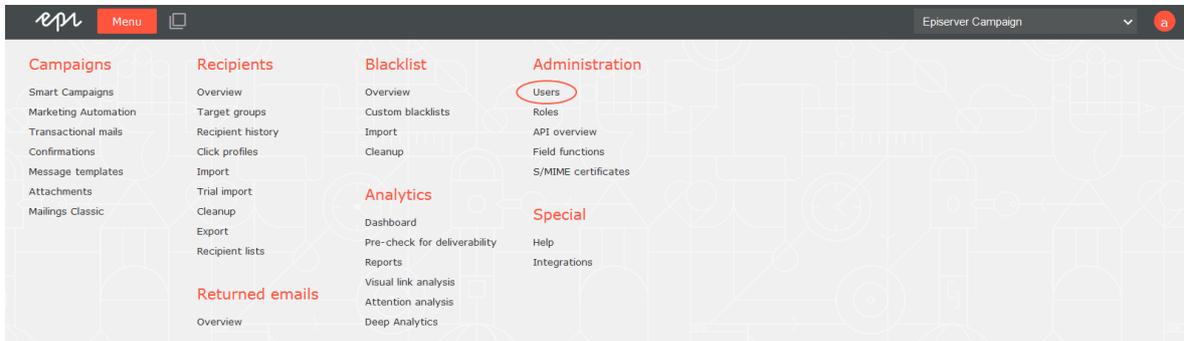
Managing users by client

1. Click **Create user**. The **Manage permissions** window appears.
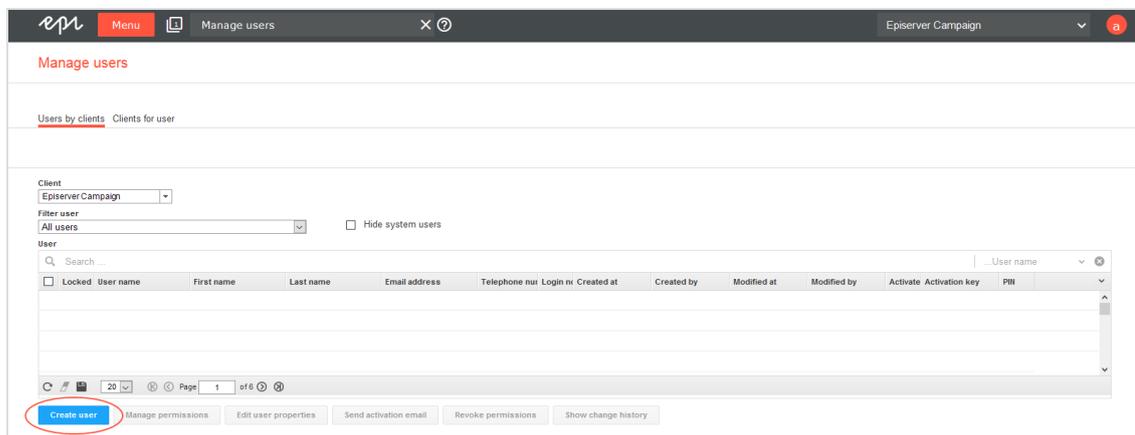
2. Enter the user's email address (which serves as the user name), language, gender, first name, last name, and telephone number.

3. To send an activation email to the user (or to reset a user's password and PIN), select **Send activation email**.

> **Note:** If you want to edit an existing user, click the user and proceed with the next step.

> **Tip:** You can edit multiple users by selecting the check boxes next to the users. However, you can only assign roles when editing multiple users. You cannot grant or revoke individual permissions.

4. Click **Manage permissions**.

5. In the **Assign roles** area, you can assign one or more <u>roles</u> to the user.

a. In the **Available roles** list, on the left side of the screen, click the roles you want to assign to the user and then click **>**.

The following roles are available:

Role	Properties
Administrator	Has all available permissions (except for additional functions) and can create additional users.
Editor	Standard user including permission to manage recipient lists and recipient history.
Author	Editor without sending rights.
Assistant Author	Editor without sending, export and import rights.
Report Analyst	Can create and output reports with Deep Analytics. Has no other permissions.
Interface Programmer	Has access to all relevant areas for working with Episerver's APIs.

> **Note:** You can only see and assign roles if you have all permissions for this role. You can create your own roles under **Administration > Roles**.
>
> You cannot assign or revoke roles that contain permissions that you do not have yourself.

   b. In the **Assigned roles** list, select the role that you just assigned and, in the **Valid from** and **Valid to** boxes, specify the period during which the role is effective. If the role is to be assigned for an indefinite period, check the **Non-expiring** box.

6. In the **Assign permissions** area, click the permissions you want to grant to the user.

   - You can grant (✅), revoke (❌), or inherit (✅, ❌) permissions that you possess.
   - You cannot grant or revoke permissions that you do not possess. Such restricted permissions are marked with the (🔒) icon.
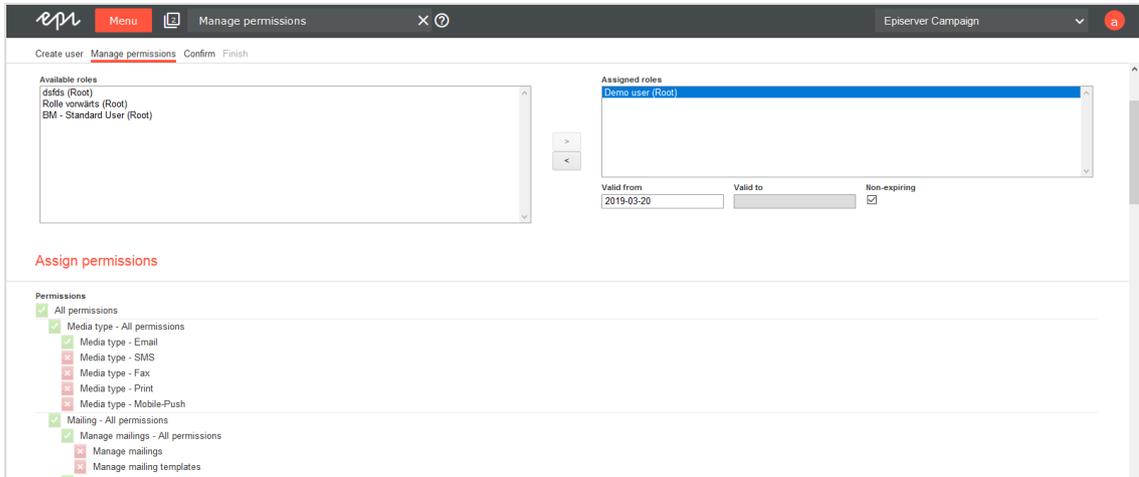
> **Tip:** Use inheritance to expedite the process by granting or revoking permissions at a higher level; by default, subordinate permissions inherit this status.

7. Click **Confirm**. A summary appears.
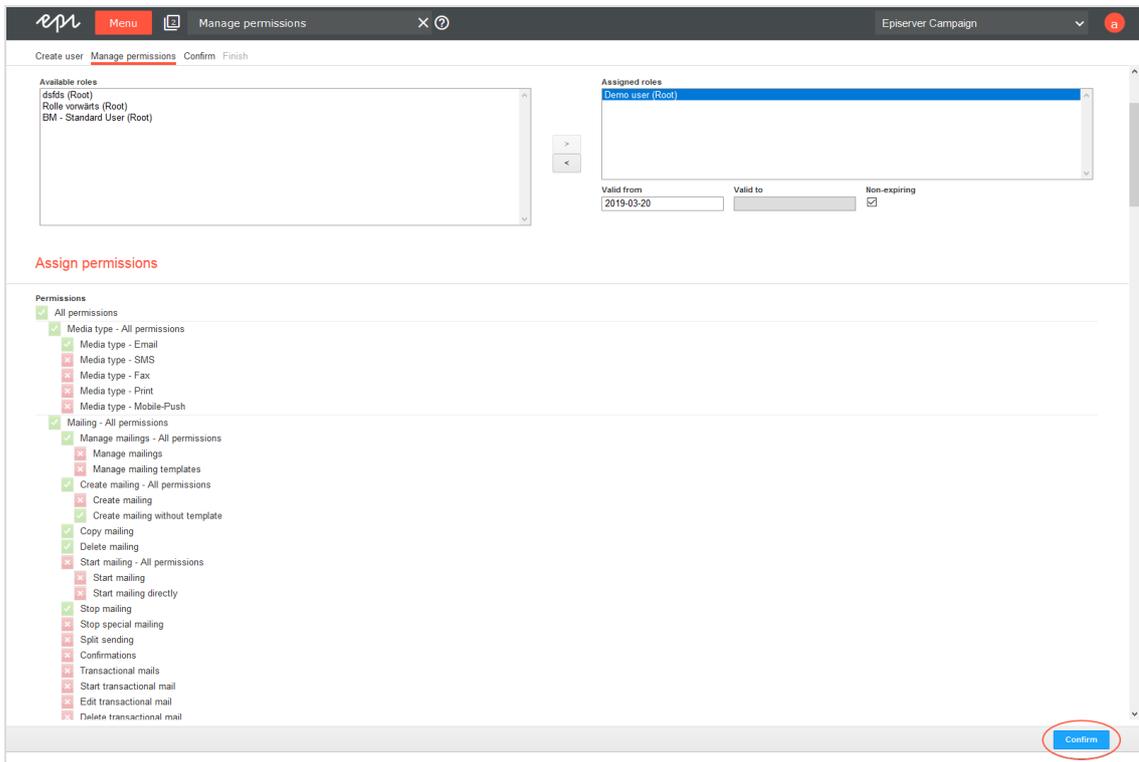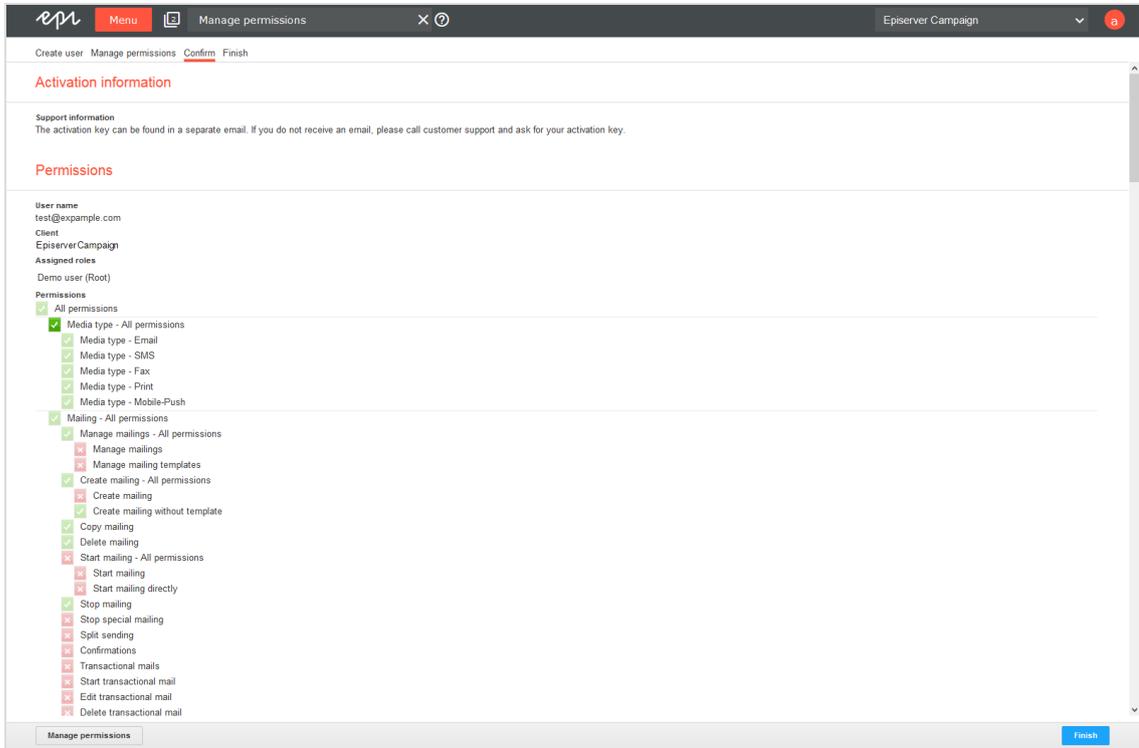
8. Click **Finish**. A summary appears, and the user is sent an email containing an activation link. After the user clicks the link, he must use the personal activation key to activate the user account .
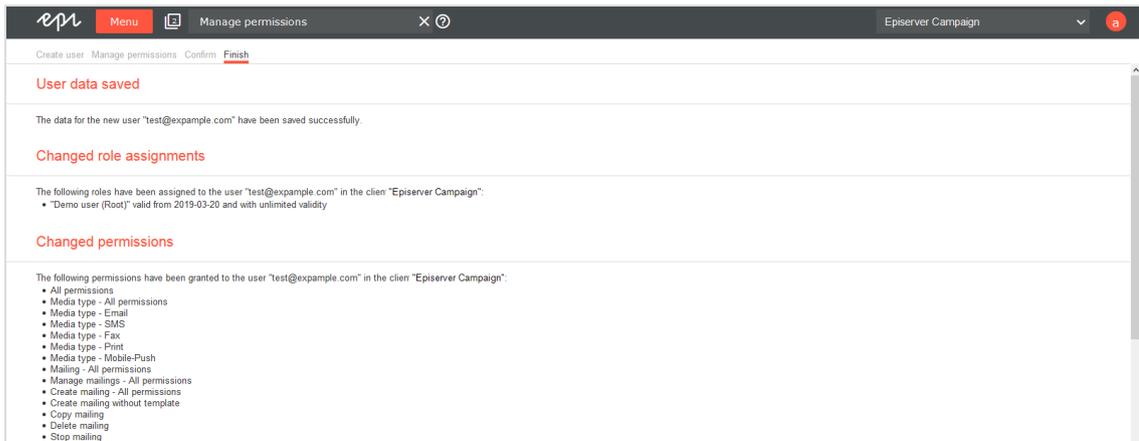
> **Note:** If a personal activation key is not available, contact **customer support**.

Managing clients for users

To display the clients for which a specific user is authorized, click the appropriate user in the **Users** list.

> **Tip:** To assign a *new* client to a user, click **Assign new client**. The **Manage permissions** window opens.

To edit an *existing* client, select one or more client check boxes that you want to assign to the user.

> **Tip:** You can only assign roles when editing multiple clients. You cannot grant or revoke individual permissions.

1. Click **Manage permissions**.

2. In the **Assign roles** area, you can assign one or more roles to the user.

   a. In the **Available roles** list, on the left side of the screen, click the role you want to assign to the user and then click **>**.

   > **Note:** You cannot assign or revoke roles that contain permissions you do not possess yourself.

   b. In the **Assigned roles** list, select the role that you just assigned and, in the **Valid from** and **Valid to** boxes, specify the period during which the role is effective. If the role is to be assigned for an indefinite period, check the **Non-expiring** box.

3. In the **Assign permissions** area, click the permissions you want to grant to the user.

- You can grant (✓), revoke (✗), or inherit (✓ , ✗) permissions that you possess.
- You cannot grant or revoke permissions that you do not possess. Such restricted permissions are

  marked with the (🔒) icon.

> **Tip:** Use inheritance to expedite the process by granting or revoking per-
> missions at a higher level; by default, subordinate permissions inherit this status.

4. Click **Confirm**. A summary appears.
5. Click **Finish**. A summary appears.

Revoking user permissions for a client

1. In the **Client** drop-down list, select the client you want to revoke the user permissions for.
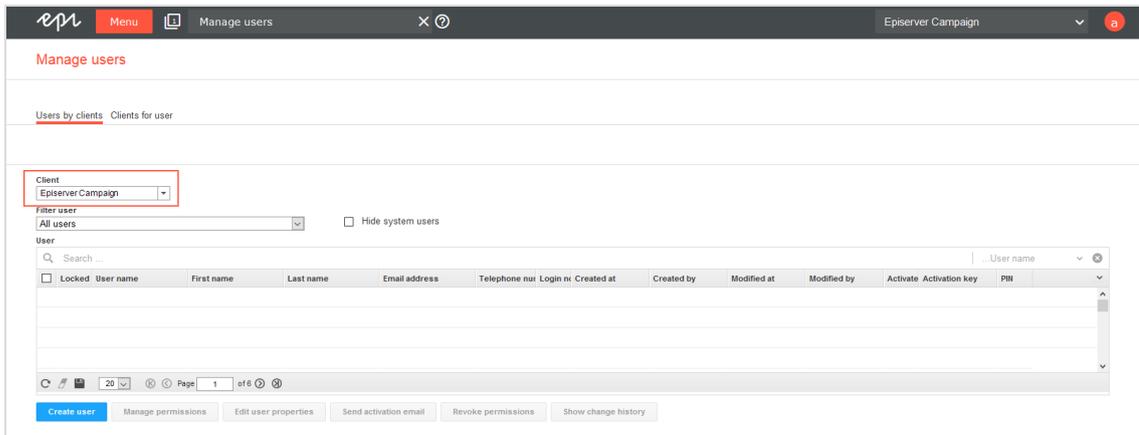
> **Note:** Check whether the user is an API user. If you revoke permissions for a client
> from an API user, your API connection no longer has access to the client. To display
> all API users, select **All users with API access in the selected client** in the **Filter
> user** drop-down list.

2. In the **Filter user** drop-down list, select **All users with at least one permission in the selected client**.

3. In the **User** list, select a user and click **Revoke permissions**.

Permissions

You can customize permissions for individual modules, functions, and activities. The following list includes the most important individual permissions:

- Create mailings
- Edit mailings
- Dispatch mailings
- Import recipients
- Clear recipient lists during import

- Export active recipients
- Export responses
- Export unsubscribers
- Export blacklist

Customer support can inform you about and set up further permissions.

If you require additional permissions for your work with Episerver Campaign, or if you need permissions for additional clients or sub-clients, contact an administrator or customer support.

To change the permissions of other users, see Managing users by client and Managing clients for users.

See Managing permissions in the Episerver User Guide for more information about how to manage access rights for other parts of the Episerver platform.

Roles

You can assign permission profiles, called **roles**, to individual users. A role may contain the same permissions as an individual user.

In your client, you can define roles for specific tasks or projects to simplify the process of managing individual users. After defining a role, you can assign it to a user permanently or for a specified period of time, for example, for holiday replacements or temporary users.

Tip: Tips for using roles

- You can only assign permissions, not revoke them. In other words, roles contain only positive permissions.
- Permissions cannot be inherited, as in user management.
- If you change a role that is assigned to one or more users, the change immediately affects those users.
- **Inherited permissions**. If you create roles in a client with sub-clients, these roles automatically apply to the sub-clients.
- **Restrictions**. You can only assign roles if you possess required permissions for the particular role (in the respective clients).

Note: Permissions in roles do not apply if

- A permission is explicitly revoked from the user.
- A main permission is explicitly revoked from the user, and this is inherited to the sub-permissions.
- A main permission, that is inherited to the current client, is explicitly revoked from the user in a main client.

To manage roles, open the start menu and select **Administration** > **Roles**.
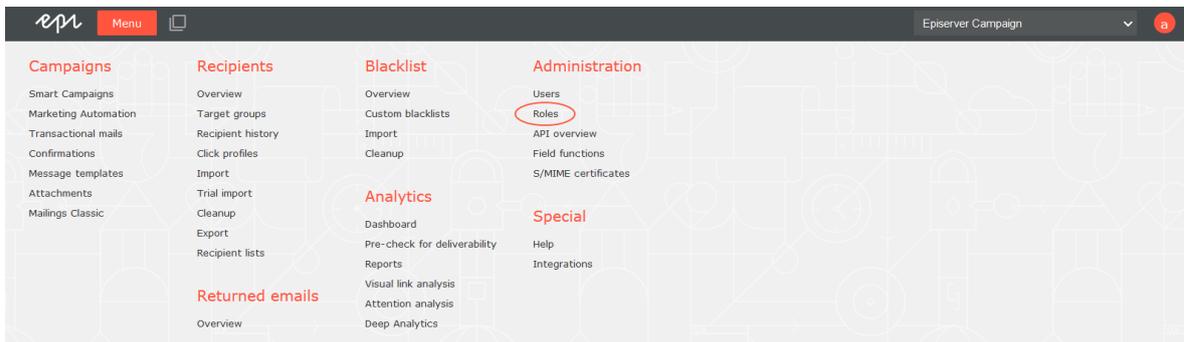
Creating a role

1. Click **Create**.
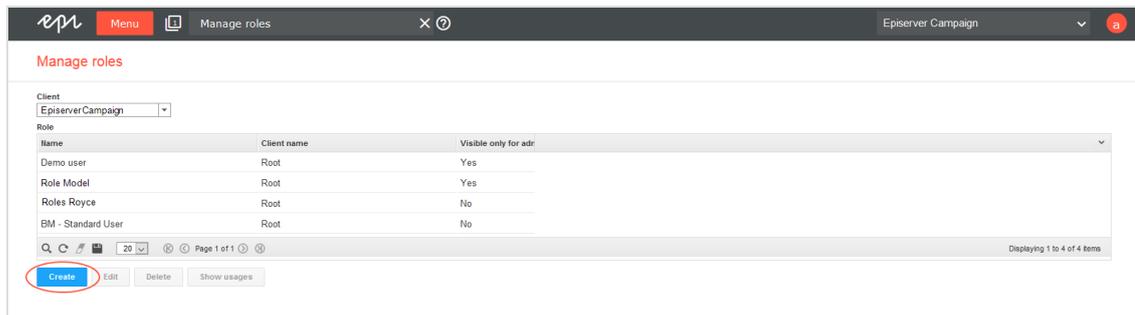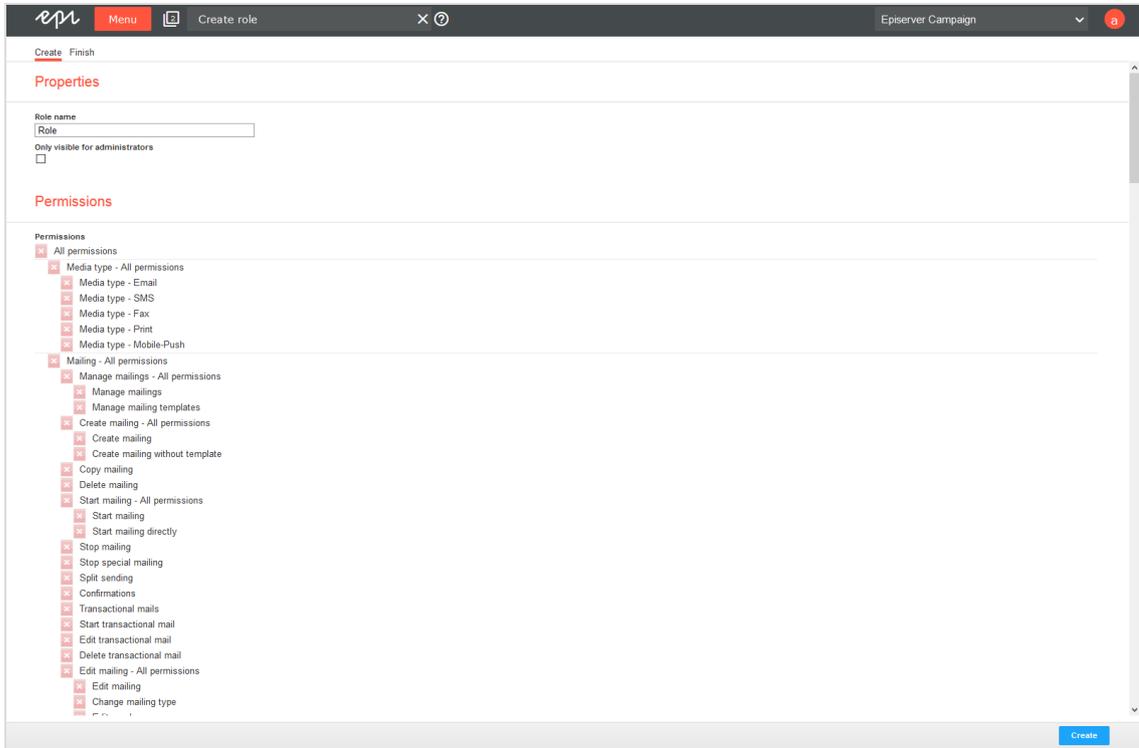
2. In the **Role name** box, enter a name for the role.

3. In the **Permissions** area, click the permission you want to assign to this role.

4. Click **Create**.

Editing a role

1. In the list, click the role you want to edit.
2. Click **Edit**. The **Edit role** window opens.
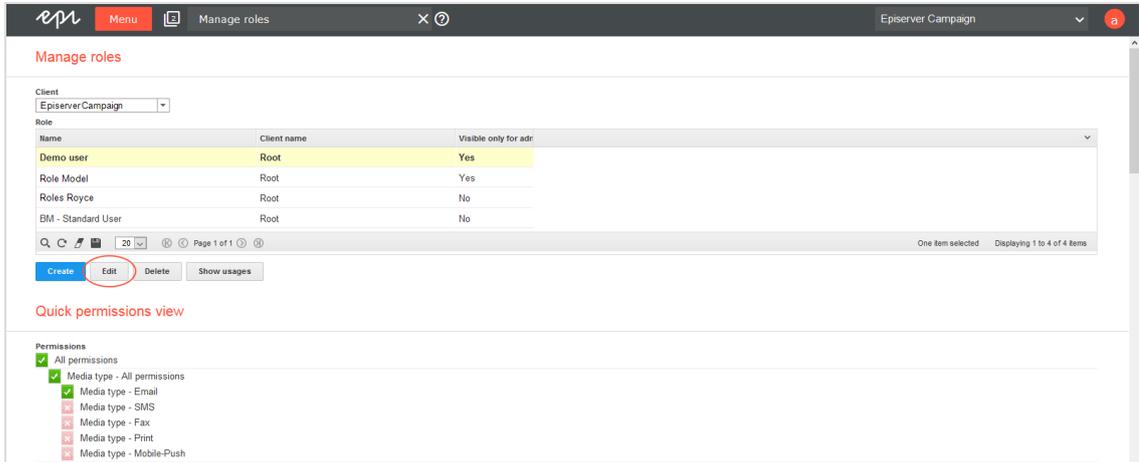
3. In the **Permissions** area, click the permission you want to assign to this role.
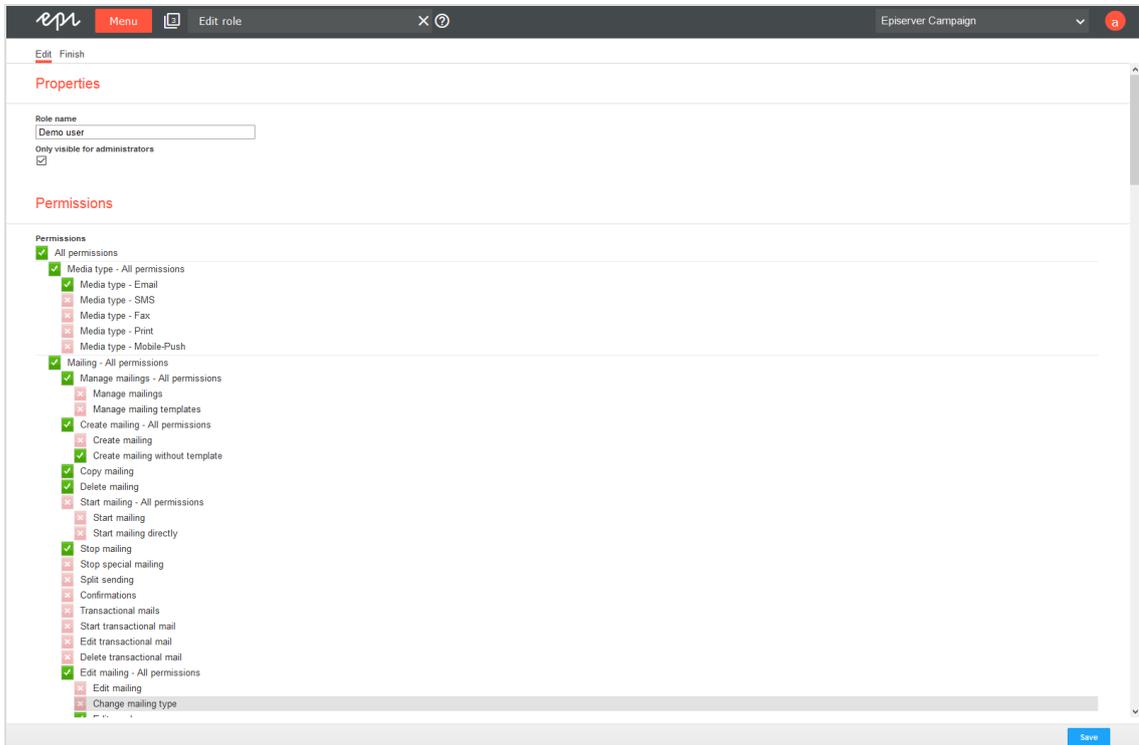
4. Click **Save**.

Deleting a role

> **Note:** You can delete a role only if no users are assigned to it. To see how a role is being used, click **Show usages**.

1. In the list, click the role you want to delete.
2. Click **Delete**. A confirmation window opens.
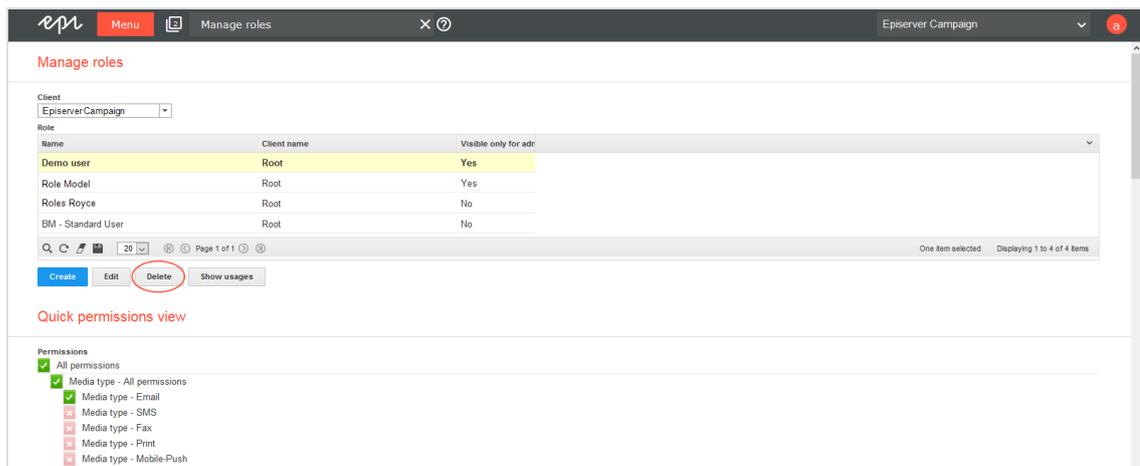
3. Click **OK**.

Showing usages

1. In the list, click the role you want to view.
2. Click **Show usages**. The **Role usage** window opens, displaying a list of users who are assigned this role.
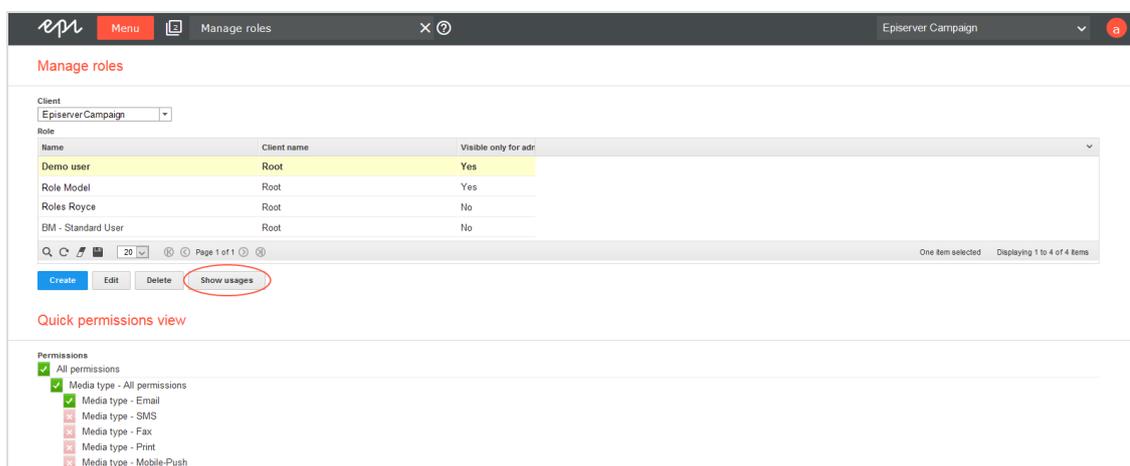
> **Tip:** You can also use this window to edit a user's permissions. To do so, click the user and then **Edit user permissions**. Next, follow the steps described in **Users**.

Clients

A client is the working environment of Episerver Campaign; a stand-alone and closed system that organizes your mailings. You can use one or more clients.

Client hierarchy

When using multiple clients, you can assign each to a different tier or organize them hierarchically.

Coordinated clients

If you set up multiple clients on a single tier, you should create a main client for rights management purposes. This setup lets you centrally control user access rights to clients.
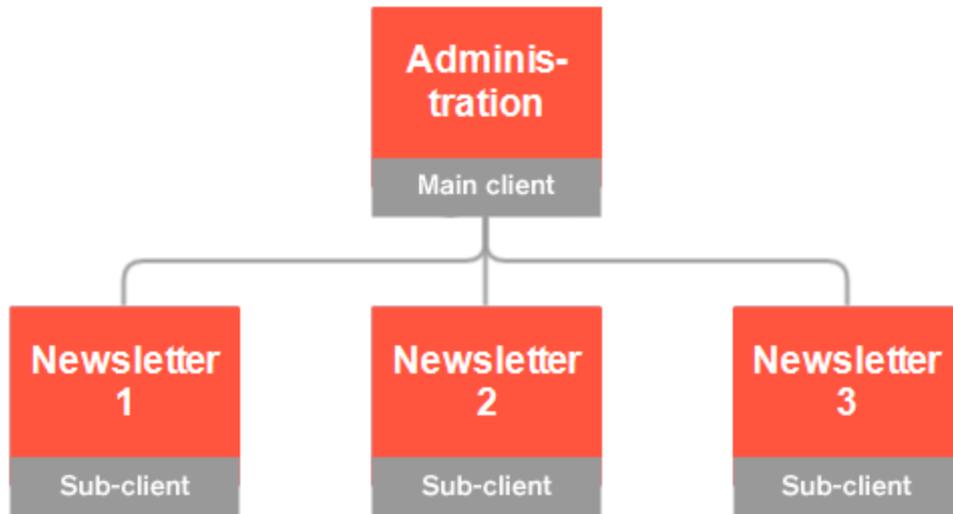
Subordinate clients

You can organize clients hierarchically. Each client inherits access rights and any blacklist from its parent clients.
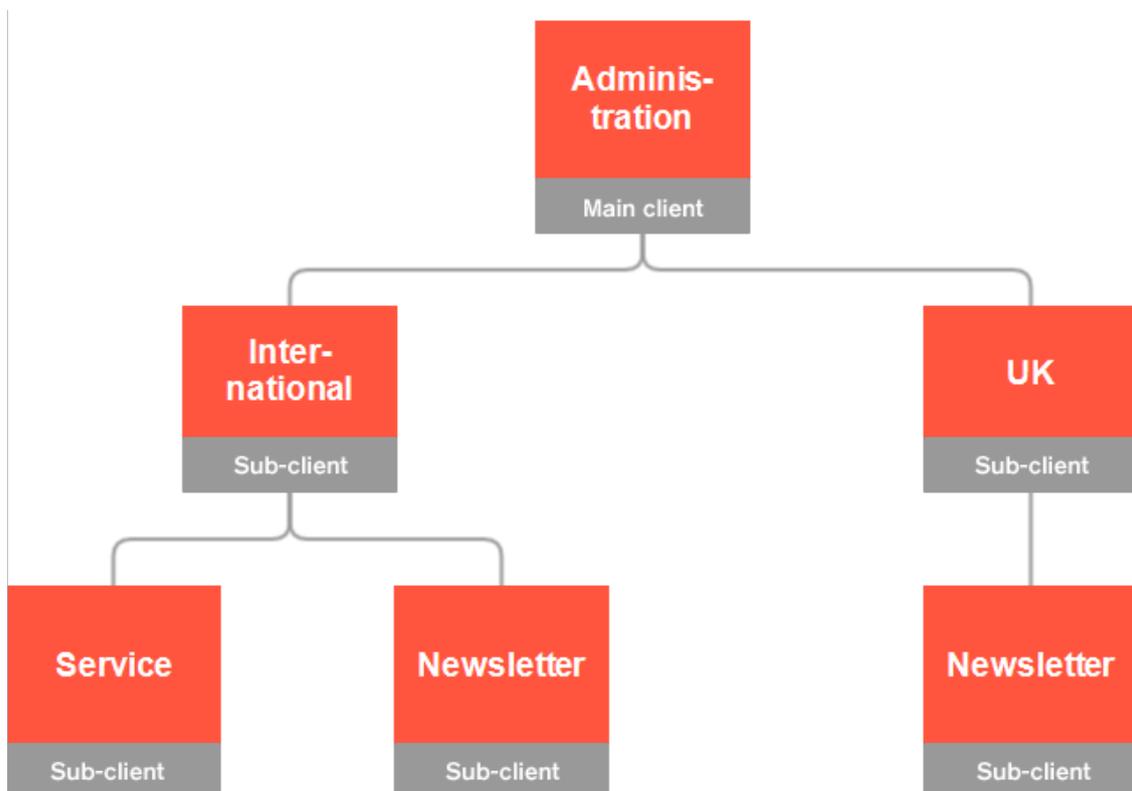
Single versus multiple clients

Each user has client-wide permissions, which enable the user to view and edit the client's mailings and recipient lists.

If you publish several newsletters and different editors work on them, create different clients so that editors can only change content for which they are responsible.

The following tables list the advantages and disadvantages of working with single versus multiple clients.

User

Theme	Single client	Multiple clients
User	If you manage several brands in a single client, a user working on one brand can access mailings for other brands within the client.	If you manage each brand in a different client, users working on a brand only see its mailings.
User rights	Apply to entire client. Depending on the scenario, you can allow or prevent access to recipient lists or mailings.	Inherited by sub-clients. To define user rights separately for each user, contact customer support.

Recipients

Theme	Single client	Multiple clients
Recipient lists	You can send different newsletters using different recipient lists. For example, a recipient list can represent a brand, country, or business unit.	The possibilities increase accordingly with multiple clients.
Blacklists	Blacklist entries apply to an entire client. This functionality cannot be changed.	Blacklist entries are inherited by, and apply to, sub-clients. This functionality cannot be changed.
Subscription	Subscription cancellations apply to the entire client. To	Cancellations generally apply

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Theme	Single client	Multiple clients
cancellations	adjust this functionality so that cancellations only apply to the recipient lists concerned, contact customer support.	to individual clients.
Bounces	Recipients that exceed the bounce limit are removed from future sending attempts for the entire client. This functionality cannot be changed.	Also applies if multiple clients are in use.

Domain

Theme	Single client	Multiple clients
Sending domain	You can use only one sending domain in a client by default (for example, @example.de). To modify this functionality to use many sending domains (with a tracking domain), contact customer support.	Each client can use its own domain with a respective tracking domain.
Tracking domain	In principle, you can only use one tracking domain per client. This functionality cannot be changed.	You can use an additional tracking domain for each additional client.

Mailing

Theme	Single client	Multiple clients
Field functions	Field functions can be used by default.	Field functions can be inherited by sub-clients by default. To adapt each field function separately, contact customer support.
Deep Analytics	You can create reports from within a client.	You can create reports from within a master client for sub-clients.

Client setup

The client setup includes the following tasks and topics:

- Recipient lists
- Users
- Templates
- Field functions
- Report templates
- Bounce handling
- Dispatch domain
- Opt-in processes
- Unsubscribe link
- Web forms
- API (application programming interface) access
- Post-click tracking
- ...customizations and add-ons

For each new client, Episerver runs a mandatory, random check of recipient records. The dispatch is only enabled after this check, but you can use other client functions before the check is finished.

Setting up sub-clients and additional clients

If you have a Episerver Campaign client and want to set up another client (or sub-client), contact customer support to discuss which settings can be inherited or copied from the existing client to speed up the process.

Deliverability basics

This section provides basic information and best practices for a successful deliverability.

Email can be personalized, automated, tested, measured and more. Email marketing is still one of the most effective options to marketers, especially when they tap into the best practices for enhancing deliverability.

Delivery vs. deliverability

Email delivery refers to the successful delivery of an email to the receiving server.

Email deliverability refers to the ability to deliver email to the intended recipient's inbox.

It's possible to have good delivery but poor inbox placement, because the email lands in the spam folder rather than the inbox.

Key figures of deliverability

An email is bounced when the receiving server, mostly the ISP (internet service provider), rejects it. Based on the error message the receiving server sends back, the rejection can either be a **soft bounce**, which is a temporary error, such as mailbox full, spam related, or time out; or a **hard bounce**, which is a permanent error, such as the email address is no longer valid.

Episerver Campaign has an overall delivery rate of 99.8%. Without knowing what percentage of emails arrives in the inbox and what percentage in the spam folder, Episerver can make inferences by analyzing key metrics for the emails.

The following measures give marketers insight about the reaction and engagement of their audience.

- Bounce rate

```
                        Bounces
=      ------------------------  x 100%
         Number of sent emails
```

> **Tip:** Depending on the business model, it is recommend to keep the bounce rate under 3%.

- Open rate

```
          Number of opened emails
=      -----------------------------  x 100%
         Number of delivered emails
```

- Unsubscribe rate

```
          Number of unsubscribes
=      -----------------------------  x 100%
         Number of delivered emails
```

> **Tip:** Generally, an unsubscribe rate below 0.5% is good for an email campaign.

- Click-trough rate

```
          Number of click-throughs
=      -----------------------------  x 100%
         Number of delivered emails
```

An email click-through is defined as the number of recipients who click links in an email and land on the sender's website, blog, or other desired destination.

- Spam complaints: Reports made by email recipients against emails they don't want in their inbox.
- Spam trap hits

  - **Recycled spam traps** are email addresses that were used by a person and then abandoned. Typically, if an email address has been dormant for the last year, many ISPs convert it into a spam trap.

    Sending to recycled spam traps shows that you have poor list hygiene, or you are not removing unengaged users.

  - **Pristine spam traps** are set up by ISPs and anti-spam organizations in order to catch spammers. No one should be sending email to those addresses.

Marketing opt-in

There is a big difference between having a list of email addresses and having permission to email to that list. There are three types of permissions:

1. **Single Opt-in (SOI)**: the interested party leaves his email address in a form, which is considered explicit consent to receive email newsletters regularly.
2. **Confirmed Opt-in (COI)**: after a single opt-in, an email is sent to subscriber's email address as confirmation of the registration.
3. **Double Opt-in (DOI)**: after single opt-in, an email with a confirmation link is sent. To complete the subscription process, the subscriber must verify the registration by clicking the link.

Sending email to non-permission-based lists results in high bounce rates, low open rates, high unsubscribe rates, high spam complaints and high spam trap hits, all of which indicate an unsuccessful email.

Sender reputation

Having the ideal ratio of text to images, considering the placement of the content elements, using an eye-catching font, personalizing the content for the target audience, and selecting the optimum sending frequency are all key factors in a successful email. However, all that effort is wasted if the intended audience never opens the email because it does not reach their inbox.

Filtering mechanisms are becoming increasingly sophisticated in determining if an email is important, junk or spam. Some check the content, while others focus on the recipients' engagement. However, from an ISP's perspective, the sender's reputation plays a greater role in the analysis.

Here are typical factors that determine a sender's reputation:

- Total number of emails sent
- Number of emails sent to invalid email addresses

- Number of recipients who mark the emails as spam
- Domain from which the emails are sent
- Whether this domain has authentication records
- IP address from which the emails are sent
- whether the IP address is blacklisted anywhere
- whether the IP address is dedicated
- whether the IP address has authentication records

Email authentication

Authentication allows the mailbox provider to confirm that the sender is the one who he pretends to be. There are four primary methods of authentication:

1. **Reverse DNS**, which implies determining which host and domain name belong to a given IP address. If a Reverse DNS Lookup returns a *no domain associated*, the email will likely bounce to the sender, or be deleted or filtered. This entry is set by default on the Episerver sending infrastructure.
2. **SPF** is Sender Policy Framework, which states which IPs are authorized to send on behalf of the "From" domain. SPF allows the receiver's host to verify that the email is being sent from the server it asserts it's sent from.
3. **DKIM** is Domain Keys Identified Mail. The recipient uses this to determine that the message has not been altered in transmission. The public and private keys must match to ensure that nothing happened to the message in transit.
4. **DMARC** is Domain-Based Message Authentication, Reporting, and Conformance. DMARC ensures that the legitimate email is properly authenticating against established DKIM and SPF standards, and that fraudulent activity appearing to come from domains under the organization's control (active sending domains, non-sending domains, and defensively registered domains) is blocked.

List management and hygiene

Marketers must ensure their emails are sent to an interested audience and, at the same time, care about the audience experience.

It's important to nurture new subscribers and make them feel welcome, while also rewarding active subscribers and maintaining their interest.

It's also important to regularly check in with less active subscribers and give them the opportunity to re-engage or opt out. If left unchecked, the number of inactive people will grow. Continuing to send emails to them will negatively affect the sender's reputation and impact deliverability, even to active subscribers.

So, the best way to segment the recipient list is by engagement level.

- Sending to highly engaged recipients frequently, even on a daily base.
- Sending less frequently to less engaged recipients.

- Using [reactivation campaigns](#) to recipients who have not been engaged for 3-6 months.
- Blacklisting recipients who complained that the email was spam.
- Deactivating recipients who did not engage within a certain amount of time (1 year, 20 months and so on). Do this once a year.

Constantly monitoring the activity and engagement level of subscribers allows marketers to better understand what the subscriber wants and tailor emails to cater to their needs.

For more information and best practices, see:

- [Deliverability best practices](#)
- [Email content best practices](#)
- [CSA guidelines](#)
- [IP warming](#)

Deliverability best practices

Good deliverability is no coincidence. High delivery and open rates are mainly a result of the general email marketing strategy and the associated adherence to industry best practices. After all, what is the point of fancy features if the email is not delivered and the recipient never sees it? The following is an overview of best practices as represented by internet service providers (ISPs) and valid in the email sector.

Clean contact acquisition process

Use contacts who actively signed up to receive your promotional mailings. This is legally required and provides the best delivery rates, as you would expect the best user engagement from them.

Avoid recipient sources such as purchased lists, lead generation, or affiliate marketing partners, as the quality of contacts is often poor, legally non-compliant, and negatively impacted by lack of concrete opt-ins and questionable acquisition methods.

Clear expectations from the beginning

- At the time of collecting his email address, is the recipient aware of what kind of commercial emails you will send?
- Lack of clarity can lead to poor open rates and spam complaints.
- Let the recipient actively manage preferences and desired frequency, for example by means of a preference center.

Double opt-In

A double opt-in process is the only way to protect your database from unauthorized third-party registrations, as recipients are actively verified by clicking the activation link in their email account. Spam traps can be prevented from being introduced into the database as no confirmation click is expected from them. Storage and documentation of the complete registration data as required by the GDPR (general data protection regulation) legislation can only be guaranteed by a double opt-in process.

| Contact acquisition via different channels | Receipt of double opt-in email | Click on verification link („Double opt-in") | Registration of email address in database |
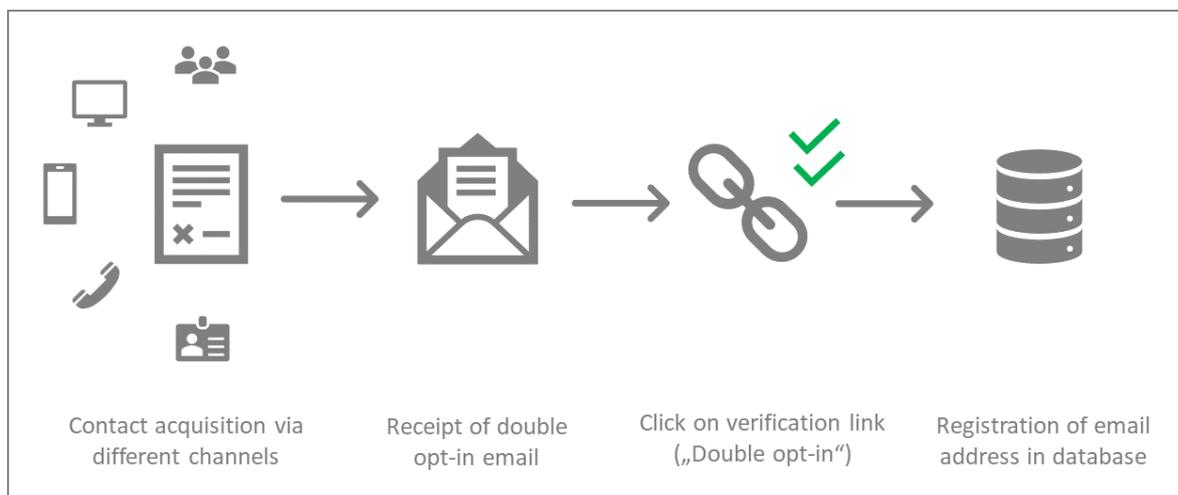
Registration forms with Captcha

Captcha is the best way to protect your registration forms against misuse. Especially in the age of bot and list bombing attacks, it has become indispensable. Integrating a Captcha protects your database from malicious addresses and the systems involved against DDOS attacks.

Your recipients attach great importance to data protection and will understand this as a confidence-building security measure.

User-friendly unsubscription process

An easy-to-find unsubscribe link should be present in every commercial email. A recipient's opt-out request of should be respected. You should allow the unsubscription from any marketing communication through a maximum of two clicks: on the link itself and, if necessary, a second time in a preference center.

Refrain from requesting additional logins or sending unsubscribe confirmation emails, as these may lead to frustration and spam complaints.
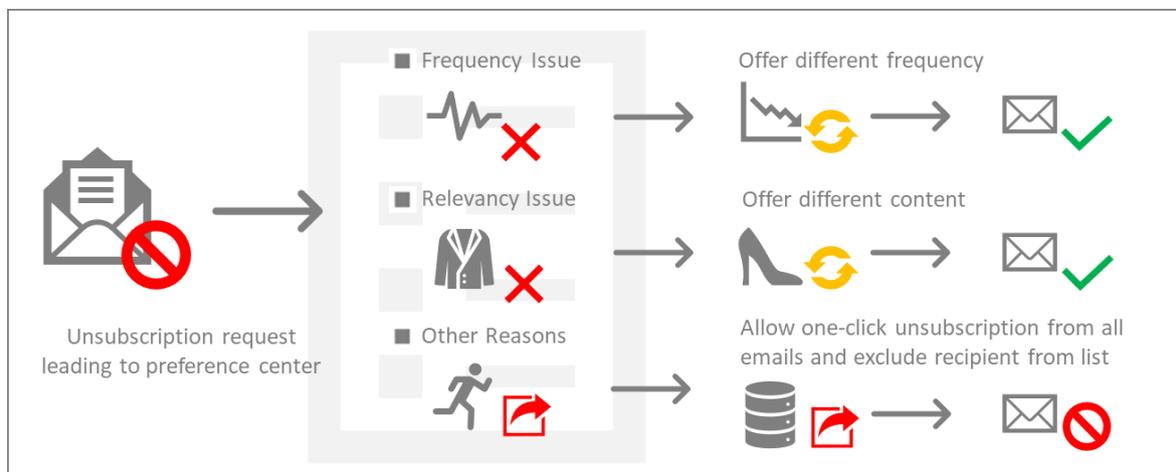
List hygiene

- Each contact should be sent to at least once every 6 months to sustainably clean up the database and avoid a high number of hard bounces.
- Exclude recipients who were not active in the newsletter in the last 12 months from regular mailings. These email accounts might be converted into spam traps by the ISPs after that amount of time.
- Legacy data often results in low open rates and, related to that, a loss of good deliverability performance.

Focus on engaged recipients

Your email marketing activities should focus on your active recipients because they are responsible for good open and delivery rates, and also form the basis of your revenue generation. These include contacts who were recently active in your emails, on your website and other channels; recipients who opened and clicked several times; and users who browsed your website and bought products from your shop. Only they should receive email from you regularly.

Exclude and reactivate inactive users

Exclude from the regular newsletter contacts who do not open for a long period of time. Lack of feedback leads ISPs to believe that your emails are uninteresting or even unintentional to the major part of your recipients, and they may punish you with spam folder delivery.

Inactive recipients, however, may occasionally be sent to with winback campaigns.

Engagement-based segmentation   Engagement-based targeting
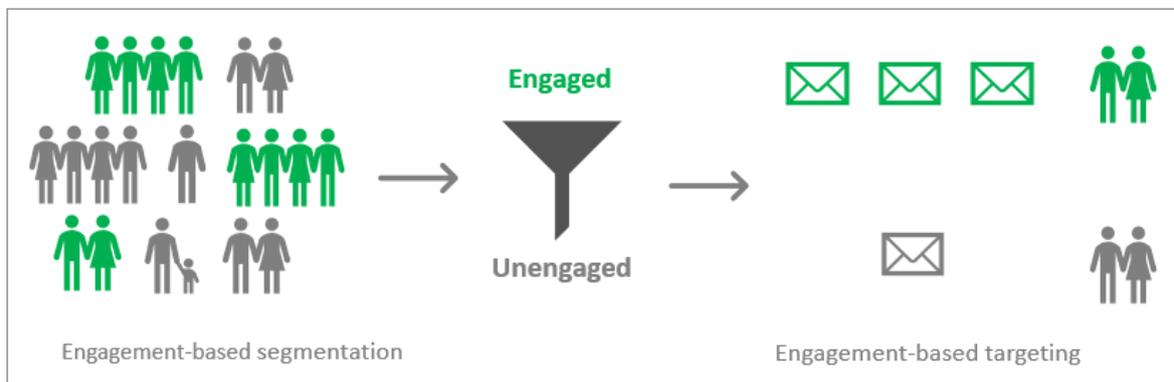
Relevant content through segmentation and personalization

- Take advantage of Episerver Campaign's segmentation feature and work with as many target groups as possible.
- You can generally apply filtering to many areas, such as user engagement, regions, interests, purchased products and age groups.
- Do not only send the same mailings exclusively to the complete database. Variation leads to more relevant content and thus better email performance KPIs.
- Irrelevant content causes poor open rates, unsubscriptions, and spam complaints in the long term.

Transparent mailing content

Your emails aim to build a relationship of trust with your brand. Therefore, they should contain an unsubscribe link, a link to the privacy policy, and a full legal imprint.

Email content should look trustworthy not only to the recipient but also to the ISP and its spam filter. Therefore, make sure your emails are not empty, do not contain any phishing-like links, and that you have an appropriate HTML / text ratio and identical HTML and text versions.

> **Tip:** To learn how email content affects your email deliverability and how you can improve your content strategy, see **Email content best practices**.

Adequate frequency

Adjust the sending frequency to your business model, but do not overwhelm your recipients. Bombarding recipients with emails can lead to high levels of spam complaints, unsubscriptions, and public complaints in anti-spam forums, which have a negative impact on your sender reputation and deliverability.

Be clear about how often your newsletter will be sent, comply with it, and give your recipients the opportunity to adjust frequency according to their needs.
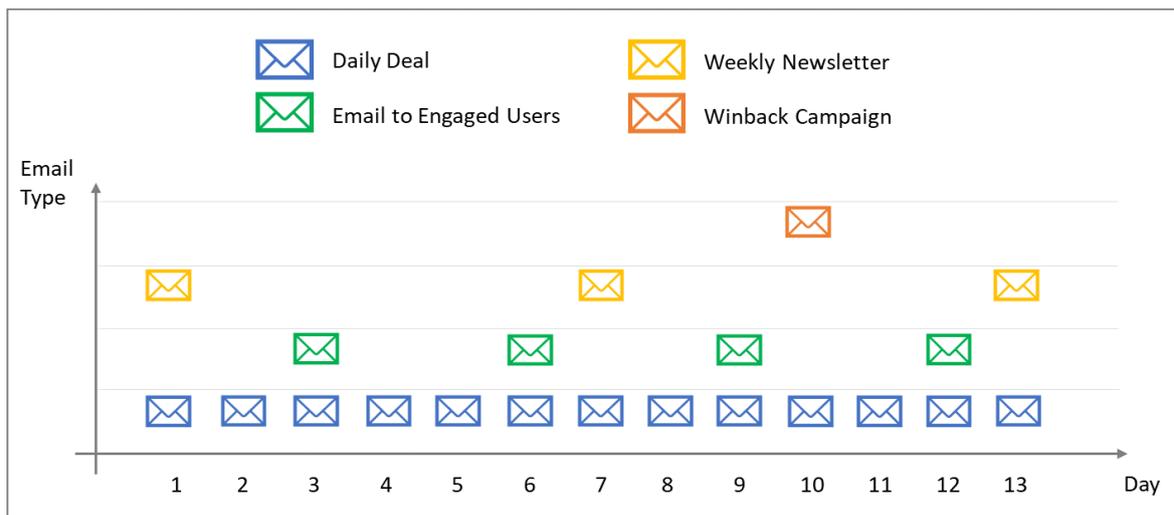
Stable sending volume

Heavily changing sending volume is a typical characteristic of spammers. Since the emails of ordinary senders might be also misclassified in such cases, avoid large irregularities of the volume sent. If you need to send much larger quantities of emails due to seasonal requirements, a slow and steady increase is recommended.

Email content best practices

Creating good email content increases the general success of the ability to maintain good inbox placement. ISPs (internet service providers) protect their users by using spam content filters, which work by analyzing a message before it is sent to the recipient's inbox.

Spam filters are used by ISPs to score incoming messages based on algorithms that find thousands of characteristics, misspellings, the similarity of words that occasionally show up within the spam folder. Legitimate emails can end up into the spam folder if their messaging contains any similar characteristics or commonly used tactics by spammers.

Refining your content to industry standards will allow you to stand a more robust chance of reaching the inbox.

This topic describes how content affects your email deliverability and provides insights into how you can improve your content strategy. Following some best practices can facilitate a successful email campaign, some smart rules include:

HTML syntax errors

Using out-of-date or invalid code will influence if your emails are accepted by domains like Hotmail, Gmail and AOL are blocked or delivered to the spam folders.

Your finished email might render well among these ISPs but if the hypertext mark-up language email doesn't comply with W3C standards (World Wide Web Consortium) you may find deliverability problems. HTML syntax and formatting errors are common tricks spammers use to get past content filters.

Text image ratio

ISPs often block emails that contain only images as a means to fight against spam. Image only emails have been known to have higher abuse complaints, higher bounces, lower email engagement. The most common used guideline is no more than 40% image and a minimum of 60% text.

Unsubscribe link

Including an unsubscribe link within your email is a fundamental rule for email marketing. The unsubscribe link should be clearly visible, with a one or two click process, allowing the recipient to remove themselves from the database instantly. If a recipient is unable to find your unsubscribe link, they are more likely to click the "this is spam" button, which can lead a mark being left on your sender reputation.

Privacy policy page and imprint URL

A privacy policy is a legal requirement for all websites that collect or use personal information from users. Adding a privacy policy link to the intended recipient destination shows ISPs that you are a sender that complies with regulatory guidelines.

Adding an imprint to your email template maintains transparency, it is recommended to include name of the authorized sender, email address, phone number, postal address and business registration number to the footer of your emails.

Email: infodach@episerver.com · Phone: +49 (0)30 - 7680 78 0 · Fax: +49 (0)30 - 7680 78 499
Episerver GmbH · Wallstraße 16 · 10179 Berlin
Management: Myles Johnson, Virginia Frazer, Peter Yeung
HRB Berlin 88738, DE813696618

You have received this email because you made a purchase in our shop. By clicking here, you can unsubscribe from further product recommendations without costs other than the transmission costs pursuant to the basic tariffs incurred in this regard.

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Attachments

Adding email attachments as a bulk sender are prohibited, doing so will flag your emails as spam. Attachments are often used to hide malware and viruses. ISP tend to block emails containing attachments to protect recipients and infrastructure.

Avoid spammy words and phrases

ISPs have become smarter about how they distinguish a spam email from a legitimate email by scanning spam words and phrases. As an email marketer doing adequate testing before a send and removing common spam words from your copy such as *Click here!* or *Free* can assist in better inbox placement. A good way of knowing what to exclude is to review the content within your personal spam folder.

An example of spammy content include:

- Excessive use of exclamation points
- Dear Friend
- Order Now, Risk-Free
- Discount
- Offer
- Sale, Buy, Free, Cheap
- Keep the following signs to a minimum: **?, %, $**
- Exclude the use of ALL CAPS
- The use of bright red/green colored fonts

Link shorteners

Link shorteners are appealing since they make your links more manageable, but in reality, using such tools increases the chance of your emails being flagged as spam. The reason behind this is that link shorteners mask your destination URL, this technique is often used by spammers to prevent recipients and the ISPs from knowing your actual website domain.

Avoid mismatched URLs

Mismatched URLs are a clear sign of a phishing attempt, avoid looking like a phisher by removing unintentionally mismatched URLs. This occurs when the link text is a URL and does not match the URL in the link HREF that the recipient is directed to.

Remove blacklisted URLs

Domains listed on blacklists should not be used. If it is a client's domain, then the client should investigate with his domain host. If it is a third-party domain the client links to (for example *tumblr.com*), it should not be used anymore due to a bad reputation.

Plain text version

There are many good reasons to include a text version of an email, in the event that HTML version is not accepted or cannot be rendered, the message will still be able to be displayed in text format. Text versions should be identical with the HTML version in terms text content and links.

Bad content creates low engagement

The messaging within your emails also has an influence on your inbox placement, it is essential to ensure that you are sending email content that your recipients want to read. ISPs will analyze how engaged your recipients are by looking at opens, clicks, bounce rates, unsubscribes, and spam complaints. Low performing emails are usually sent to the spam folder. Good practices to keep your recipients engaged include providing personalizing content based on your recipient's needs, adding CTA (call-to-action) points, keeping subject lines short, content messaging less salesy, segments, personalization, and dynamic content.

A/B testing is an important technique that can help you understand, how your recipients respond to different content, and which campaigns are most effective with engagement metrics. See [Sending a split mailing](#) and A/B testing in the Episerver CMS section.

Other recommendations

- An email message size should be less than 200 KB in general. Redundant code, increased image sizes, template height /width can influence the overall size of your email. (Email size to Gmail should be a maximum of 102 KB.)
- The subject line should have a maximum length of 50-60 characters.
- Add a comment to your emails, requesting your recipients to add your email address to their safe senders list.
- Remove any iframes from your templates.

In conclusion, we have seen that content influences not only the value to your recipients, but following the above tips, improves your ability to gain better inbox placement and a better performing sender reputation as ISPs start to trust you as a bulk sender.

CSA guidelines

Episerver is a partner of the Certified Senders Alliance (CSA) and takes part in their whitelisting program, which complies with GDPR (general data protection regulation) and ensures legal conformity of the sender's email marketing processes. CSA whitelisting offers preferred delivery and better inbox placement at participating Internet Service Providers. Participation in the program involves technical and legal standards that are decisive pillars of the program, which must be fulfilled by each sender. The following sections provide an overview of the CSA's legal standards and how to implement them.

Opt-in requirements

Newsletters based on GDPR article 6

Generally, marketing emails that contain any type of advertising and aim at a sale need the recipient's consent. Double opt-in (DOI) is a requirement for Episerver Campaign to comply with GDPR and CSA documentation requirements because it is the only procedure that grants traceability to ensure that only authorized user can subscribe.

Product recommendations based on EU directive 2002/58/EC (41)

Alternatively, recommendations about similar products and services may be sent to customers who made a purchase without their explicit consent. However, because this type of email is usually a source of spam complaints, stricter formal requirements apply.

Newsletter registration form requisites

Must haves

- Consent must be given actively; pre-checked checkboxes are not allowed.
- Consent must not be coupled with subscriptions to other services.
- It must be clear from whom the subscriber is going to receive what content.
- A remark indicating that unsubscription is possible at any time and by which methods, at least an **Unsubscribe** link and email address, must be clearly visible when the email address is collected.
- A maximum of 10 third parties, including sponsors, must be explicitly named.
- The email address is the only mandatory field; all other fields must be optional. (This refers to pure newsletter registration forms only; account registration or checkout forms may have more mandatory fields.)

Nice to haves

- A link to the privacy policy in every contact acquisition form.
- The recipient should be informed about the newsletter frequency.

Newsletter content

- A full legal imprint needs to be in the email footer including: physical address, email address, phone number, authorized representative and business registration number.
- Unsubscribe and privacy policy links need to be in the email footer.

Customer relationship requisites for checkout acquisition forms

Must haves

- The address was acquired through a purchase; a transaction was made, and the product was not returned.
- The address is used for direct advertising of own similar goods or services.
- The customer has not objected to this use, meaning there was no previous unsubscribe from commercial emails.
- A remark stating that emails about similar products or services will be sent must be clearly visible when the email address is collected.
- The form must contain information that one can unsubscribe at any time "without costs other than the transmission costs pursuant to the basic rates being incurred in this regard" or similar and by which methods, at least unsubscribe link and email address.

Nice to haves

- Include a link to the privacy policy every contact acquisition form.
- Inform the recipient about the newsletter frequency.

Product recommendation content

- The products advertised need to be similar to the product purchased. "Similar" means they have the same sense and can be used in the same way. No other advertising must be included.
- A full legal imprint is in the email footer: physical address, email address, phone number, authorized representative and business registration number.
- Unsubscribe and privacy policy links are in the email footer.
- The email also contains information that one can unsubscribe from it "without costs other than the transmission costs pursuant to the basic rates being incurred in this regard".

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Episerver GmbH · Wallstraße 16 · 10179 Berlin
Management: Myles Johnson, Virginia Frazer, Peter Yeung
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You have received this email because you made a purchase in our shop. By clicking here, you can unsubscribe from further product recommendations without costs other than the transmission costs pursuant to the basic tariffs incurred in this regard.

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Imprint requisites

- An imprint page must be present on the website and easily accessible.
- The imprint page must contain: physical address, email address, phone number, VAT identification number, and authorized representative.

Privacy policy requisites

Must haves

- A privacy policy page must be present on the website and easily accessible.
- The recipient must be informed from which sender he or she is going to receive which type of emails.

Newsletter

- A remark must be present that indicates that unsubscription is possible at any time and by which methods (at least unsubscribe link and email).
- A maximum of 10 third parties, including sponsors, must be explicitly named.

Customer relationship

- A remark stating that emails about similar products or services will be sent must be clearly visible.
- The privacy policy must contain the information that one can unsubscribe at any time "without costs other than the transmission costs pursuant to the basic rates being incurred in this regard" or similar and by which method, at least unsubscribe link and email address.

Nice To haves

- The recipient should be informed about the frequency of the newsletters or product recommendations.

Newsletters based on GDPR Art. 6

We will use your email address for sending you our monthly newsletter, including valuable information on new products and services if you actively subscribe to it. You can unsubscribe from it at any time by clicking the unsubscribe link included in every newsletter or by sending an email to company@example.com.

Product recommendations based on UWG §7 (3) (German Law Against Unfair Competition)

Whether or not you subscribed to our newsletter, we will send you regular personalized recommendations on similar products and services when you have made a purchase in our shop. You can unsubscribe from the personalized recommendations at any time by clicking the unsubscribe link included in every product recommendation mailing or by sending an email to company@example.com, without costs other than the transmission costs pursuant to the basic tariffs being incurred in this regard.

Unsubscribe requisites

- Unsubscription must be easy and requires no more than two clicks.
- Unsubscription must be free.
- No further login must be required.
- No persuasive language must be used.

Registration data requisites

Must haves

- Context of contact acquisition (newsletter, customer relationship and so on).
- URL / screenshot of online registration form or scan of offline registration form / contract.

- Type of opt-in given, if applicable (double opt-in, single opt-in and so on).
- Date and time of registration, and DOI confirmation.

Newsletter

- Declaration of consent as presented when email address is collected.

Customer relationship

- Remark informing recipient that contradiction to this type of advertising is possible at any time as presented
.
- Purchase data.

Nice to haves

- IP address of registration and of DOI confirmation

IP warming

New sending IPs (Internet Protocol address) have no sending history and are considered a cold IP. At this point, they need to acquire a good reputation with ISPs (internet service providers).

Hotmail, Yahoo!, AOL, Gmail need to see that you are sending important, consent-based messages to permit your mailings into your recipient's inbox.

IP warming is the process used to build a good reputation with ISPs. ISPs monitor your IP to track your sending behavior and are likely to accept your messages based on a good sending reputation.

The IP warming process includes sending consistent, low volume email campaigns, gradually increasing this volume over time until you reach your full volume capacity. ISPs then gain confidence in you as a sender.

It can take 4-6 weeks to complete the IP warming phase. This depends on your volume amount and how well your recipients engage with your messaging.

During the warming process, ISPs set receiving limits on your IP until you meet their standards of good reputation.
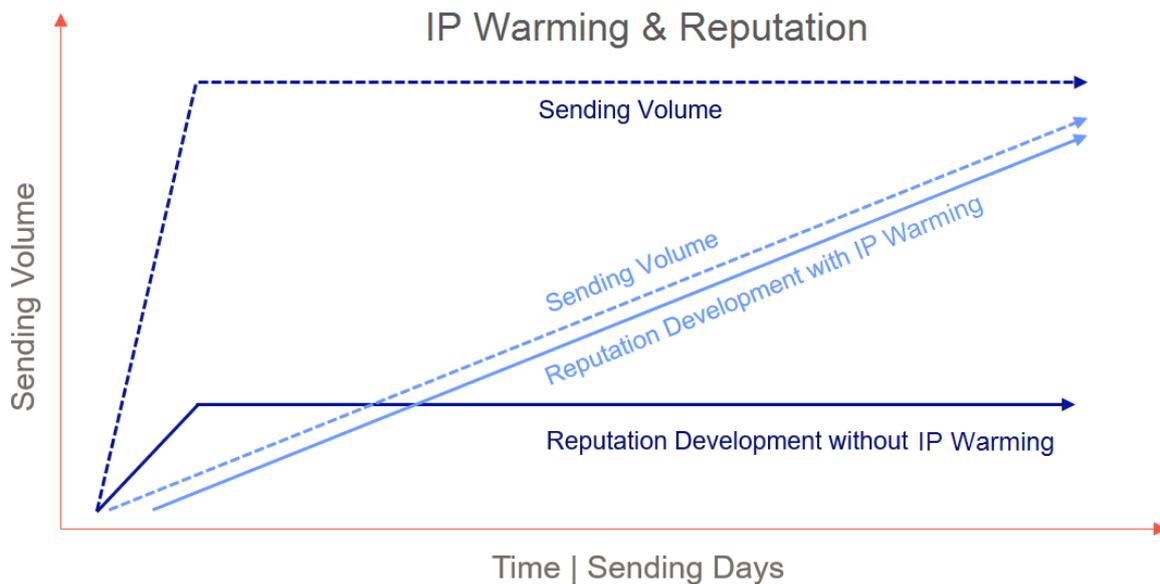
Getting started with IP warming

- Whitelist the Episerver sending IP with your internal corporate network to ensure emails are not blocked by your internal spam filter.

- Ensure your IT team updates your DNS authentication records.

- Clean your data using segmentation and email validation tools. Warm your most active users only during IP warming phase. Active emails addresses consist of those who have recently opened, clicked an email in the last 9 months or opted-in to your mailings using a double opt-in database. Focus primarily on recipients who are less likely to report spam complaints. Never send to a bought or an old, unverified email list.

- If you don't have engagement data to identify active email address, focus on recent signup data.

- Create email content that encourages recipient engagement and that is specific to the recipient's interests. See also: Email content best practices.

- Send a welcome email to your recipients. This reminds your recipients that they have opted-in and generates engagement for your first send out.

- As a new sender, it is normal to see some blocking and bulking in the first instance of sending. ISPs are trying to determine your legitimacy. As you continue to send to good, active email addresses and increase user engagement, bulking should end.

- Review your engagement data (opens, clicks). A decrease in engagement can lead to your messages being bulked by the ISP. Remove recipients from your marketing campaigns who are consistently not engaging.

- Frequency is important. ISPs like to see consistency in your sending and user engagement metrics.

- Reputation systems store reputation history for 30 days. Ensure that you do not go without 30 days of sending from an IP. Doing so may require restarting the warming process.

IP warming schedule

Following an IP warming schedule assists in gradually establishing a reputation with ISPs as a legitimate email sender. Start with small email volumes, and gradually increase volume each day according to the two-week set schedule. The following schedule suggests a maximum of 40 percent to 100 percentage increase in volume per day. This however greatly depends on factors including list hygiene, how engaged your recipients are, and spam complaints among other things.

Example IP Warming Schedule
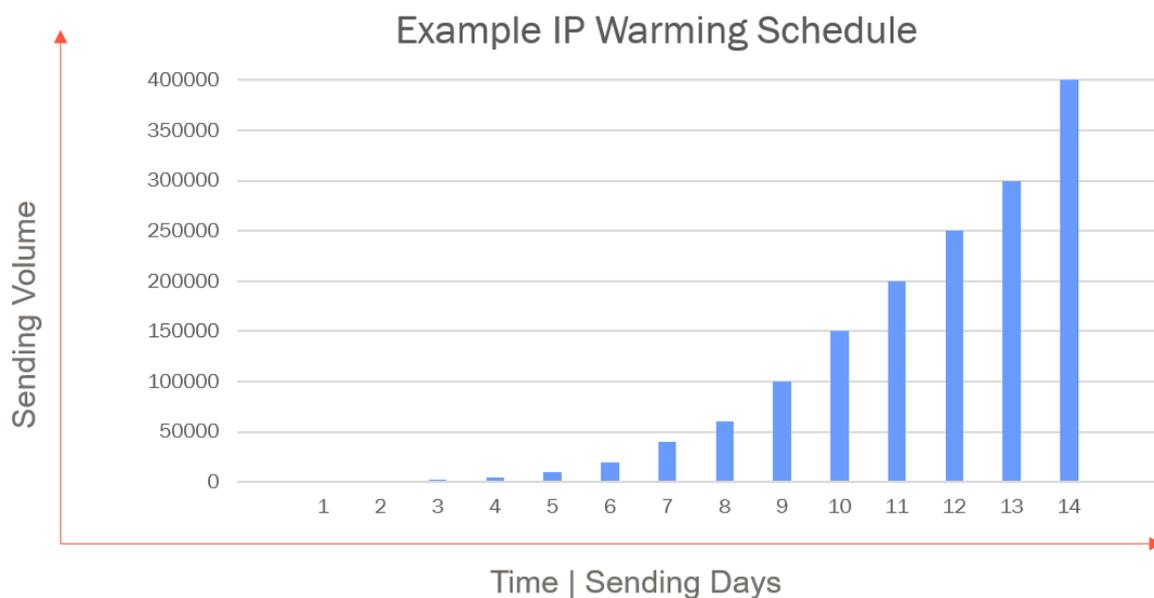
Day	Daily sending volume
1	500
2	1000
3	2500
4	5000
5	10000
6	20000

Day	Daily sending volume
7	40000
8	60000
9	100000
10	150000
11	200000
12	250000
13	300000
14	400000
	Continue to double your volume until you have reached your target daily volume.

Tips during the IP warming process

- Ensure that you are sending consistently and keep to that frequency.
- ISPs (internet service providers) like AOL want to see spam complaints less than 0.2%. Review email engagement on each send and remove recipients who are not opening.
- Once your IP (Internet Protocol address) exceeds the threshold set by the ISPs, the ISP may start to soft bounce the emails. If you experience a higher than normal soft bounce rate, stop sending and re-start the send later in the day.
- Start the day with recipients who are very likely to open your emails.

What can cause delivery issues during IP warming

- High spam complaints. This occurs when a recipient clicks "this is spam" button which is shown within the email client.
- Invalid email addresses (hard bounce).
- IP address and domain blacklistings on RBLs (public blacklists).

- Spam traps located within your data list.
- Unexpected volume increases.

What ISPs like to see

- Consistent opens and clicks
- Consistent email frequency
- Email best practices are in place, as detailed in **Deliverability best practices**.
- Emails are authenticated (SPF, DKIM, DMARC)

Warming a sending domain

A sending domain requires a good sending reputation for messages to enter your recipients' inboxes. Domain warming is similar to IP warming, as it represents mailing practices and volume. The same warming approach mentioned above can be applied to warming up sender domains. The difference however is that domain warming focuses on recipient engagement, which is the key factor to focus on.

Exclusive IP addresses

> **Note:** Contact customer support to activate this feature.

If you want to send mailings from exclusive IP addresses instead of the default Episerver IP address pool, you can lease one or more IP addresses. These addresses are reserved to send mailings exclusively from your client. Within 30 days, a reputation trend is visible. The dispatches of other clients have no influence on the reputation of your IP addresses.

> **Tip:** A Return Path certification requires exclusive IP addresses.

ISO 27001 certification

Episerver Campaign's safety management

The ISO/IEC 27001:2013 certification by TÜV Süd gives you as a user the guarantee that Episerver's safety management for operation, service and development of email marketing platform complies with internationally recognized standards regarding data and information security.

In external, multi-stage audits, processes sensible to set up, implement, execute, control, maintain and optimize information security are evaluated.

In addition to the evaluation of the technical and organizational processes, the handling of information within the company was scrutinized, for human error has to be taken into account and made safe.

Your advantages

The internationally recognized certification for information systems according to ISO/IEC 27001:2013 gives you safety and comparability with other systems when choosing the email marketing service provider that suits you best. With this certification, you can be sure that your data is hosted, stored and protected against unauthorized access at Episerver according to defined, approved standards. The certification also covers the operation and support of Episerver's dispatch infrastructure. In these aspects, Episerver Campaign scores with a highly available, fail-safe and powerful system.

What does ISO/IEC 27001:2013 mean?

ISO/IEC 27001:2013 is a standard for an information security management system that checks and evaluates the following areas and assets:

1. **Information security management**. Information security management evaluates processes, their functionality and infrastructure of Episerver Campaign by identifying possible threats, risk handling and responsibilities. It represents the current state and serves as a base for the PDCA guidelines for continuous improvement of information security.
2. **PDCA guidelines for continuous improvement of information security**. These guidelines for the **P**lan-**D**o-**C**heck-**A**ct process define in four phases the suitable measures to determine and evaluate information security; the measures to be implemented and realized; how these measures and their effectiveness can be verified constantly; and finally how these measures can be maintained, improved and fixed during operation.

3. **Inventory sheet**. Assets of the company are registered here. Each asset is evaluated regarding its priority for information security. Next, a procedure directory is created, which contains and describes all processes related to this asset.
4. **Risk measure matrix**. In this matrix, all implemented security measures are correlated to a concrete risk. With this matrix, the remaining risk can be determined and thus assured that only a minimal acceptable remaining risk will occur at any time in any process.
5. **Compliance**. This aspect ensures that all processes are defined within the legal range and in compliance with the standards set by the legislature.

Who certifies all this and how is the process conducted?

The certification is a multi-stage process and is executed by an external service provider. The certification of Episerver Campaign was executed by TÜV Süd. The certification process involves the following steps and phases:

1. **Assessment for certifiability**. Done prior to the actual certification.
2. **Certification audits by TÜV Süd**. Multi-stage audits in all security relevant areas and divisions of the company.
3. **Verification audits**. Yearly audits, which guarantee the compliance with all standards. These audits also verify that the information security management is being improved and developed further. This is a requirement for the certification.
4. **Recertification**. Every three years, the certification is renewed in an audit similar to the certification audit (see number 2).

Service description

Episerver Campaign lets you run dialog marketing campaigns on channels and send professional marketing messages by email, Mobile Push, or SMS from a single software package.

Episerver Campaign comes fully integrated with the tools for one-to-one dialogs with your customers:

- Omnichannel marketing campaigns
- One-shot campaigns
- Marketing Automation
- Transactional mails
- Easy creation of professional mailings
- Opt-in processes
- Recipient management

- Powerful [segmentation](#) and [analysis](#) tools that let you analyze the success of your mailings for each recipient, and generate reliable data for your marketing research.

Episerver Campaign communicates with your webshop, customer relations management system or web analytics service provider to do the following:

- [Automatically display products](#) from your webshop in your messages
- Create [target groups](#)
- Create [personalized product recommendations](#)
- Consolidate your customer relationships through successful [closed-loop marketing](#)

Episerver Campaign is TÜV-certified as compliant with [ISO 27001](#) and a member of the Certified Senders Alliance (CSA).

Omnichannel marketing

Reach your customers on channels with flexible tools for successful omnichannel marketing – using a single provider.

- Email campaigns
- SMS campaigns
- Push campaigns
- Multi-channel campaign automation
- Separate blacklist management for each channel

Email

Episerver Campaign virtually sends your emails in real time. Episerver Campaign also comes with deliverability management, which significantly increases deliverability rates.

Range of features

- Sending speeds of up to 50 million emails per hour; more than 90% of emails delivered within the first minute.
- Comes with email throttling to let you, for example, avoid unusually high traffic to your website and stagger customer visits for campaigns that are likely to attract a lot of interest (such as special offers, prize draws, or surveys)
- Enhanced HTML layout for ensuring emails are correctly displayed in webmailers and email programs
- [Mobile Fusion](#) provides responsive design for optimized display on mobile end devices
- Auto generated text version
- Auto generated online version

- Landing pages
- Can be personalized
- **Web forms** for allowing recipients to register and recipient management
- SWYN (share with your network) provides sharing email content on social networks (Facebook, Twitter, Xing, Myspace).

SMS

SMS provides seamless integration of messaging to reach your customers.

- Supports GSM and UCS2 coding for international character sets
- Capable of sending multi-part SMS (concatenated SMS)
- Direct message routing to 12 countries
- Standard number-based sender identification
- Speed-dial number-based sender identification
- Alphanumeric character-based sender identification
- Can be personalized

Mobile Push

Mobile Push sends automated push messages and reaches every customer who has your app on their smart phone or tablet.

- Available for Android and iOS
- App-based opt-in methods
- Can be personalized

Episerver Campaign management

Smart Campaigns

Smart Campaigns have a convenient front-end for one-shot campaigns. Navigation paths and click paths are optimized for maximum efficiency.

- Create campaigns with drag and drop
- A/B tests (split tests) and automatic send function for the best performing message
- Six criteria for selecting the best split
- Allows campaigns to be worked on by several users simultaneously

- Designed for creating email, SMS and push campaigns
- Create campaigns from message templates
- Reuse successful campaigns with a single click
- Integrated pre-campaign recipient-path-analysis
- Integrated post-campaign reporting
- Select send dates and delayed delivery in line with A/B test results
- Send messages to specific target groups or a limited number of recipients
- Episerver Campaign throttling

Marketing Automation

Marketing Automation lets you automate frequently recurring customer dialogs, such as welcome and happy birthday messages, reactivation campaigns, abandoned cart emails, and much more. Marketing Automation event and date-triggered mailings increase conversion rates and let you analyze recipient flows and activities in real time. Marketing Automation furthermore comes with an automated feature for changing recipient data and moving or copying recipients to different recipient lists.

- Create Marketing Automation campaigns with drag and drop
- Omnichannel. Send out email, SMS and push messages to different end devices and target groups from a single Marketing Automation campaign
- Create automatic lifecycle marketing campaigns
- Send out activity and event-based mailings from a single campaign
- Actively run multiple campaigns simultaneously
- Link multiple campaigns, for example, by automatically assigning recipients from one campaign to another
- Modify campaigns while active
- Post-click-triggered campaigns
- Integrated campaign recipient-management (updating, moving and copying recipients/recipient data)
- Integrated campaign reporting for active campaigns – monitor the number of recipients who passed the individual campaign nodes at any time

Transactional mails

Transactional mails are triggered by recipient actions or events, such as an anniversary. Episerver Campaign sends transactional mails using a high-performance API (application programming interface). Transactional mails can be activated in Marketing Automation or sent through the REST, SOAP or HTTP API.

- Sent through Marketing Automation
- Can be sent as email or SMS
- Sent in real time using high-performance interfaces

- Can be personalized
- Can send personalized attachments (HTTP API only)

Registration confirmations

[Registration confirmations](#) manage your double opt-in mailings with Episerver Campaign and make them reflect your corporate design. The integrated reporting feature lets you check the number of recipients who completed the registration process.

- Administration of multiple opt-in mailings in your Episerver Campaign client
- Sent in real time using a high-performance transaction API
- Edit contents while the registration confirmation is active
- Can be personalized

Content management

Our intuitive content management system (CMS) lets you create appealing, ready-to-send mails in no time. The modular design makes it easy to insert text and images. You can preview content on different devices (email, web, mobile) while editing. The content management system also can be used to define personalized and group-specific content.

- WYSIWYG (what you see is what you get) editor
- Source text editing
- Import mailings as zip archives
- Automatic text version generator
- Create, manage, and change landing pages
- Content reports for link validation
- Automatic link extensions for click tracking
- Manage HTML, text, and mobile link tracking
- Personalized and target group-specific subject lines
- [Personalized images](#)
- Automatically creates online version
- [Attachments](#)

> **Note:** The following features are optional. Contact [customer support](#) for more information.

- Send images with offline HTML
- Personalized attachments (only when used with transactional mails and the HTTP API)

Template Kit

Template kit lets you define the layout and appearance of the elements in your mailing, to which you can copy or move content blocks via drag and drop. The basic mailing elements (such as, sender information) are pre-defined to create new mailings and make them less error-prone.

- Predefined pre-header, header, body and footer sections
- Grouping paragraphs for creating flexible layouts (1- or 2-column)
- Paragraph types for essential applications
- Target groups and click profiles for use at paragraph level
- Nine fonts to choose from
- RSS feed integration
- Content interface
- Add links to social networks (SWYN)
- Mobile Fusion for responsive web design – to ensure that your mailings are optimally displayed on mobile devices, with a preview function for conventional device formats
- Separately edit HTML, text, and mobile mail versions
- Click2Go is a button generator for adding buttons or call-to-action elements in a design-consistent layout, conveniently and directly to your template
- Easy edit – split-screen view for previewing the mailing
- Inline editing – edit your texts directly in the mailing preview
- Easy Copy lets you copy and paste individual elements from other mailings or clients

> **Note:** The following features are optional. Contact customer support for more information.

- Install additional standard web fonts
- Custom fonts – install user-defined fonts

Custom mailing content templates

Custom content templates are set up by customer support on request. Custom templates are based on your corporate design and style guide and ensure that your newsletters appear exactly as intended on recipient devices.

- Template with your corporate design
- Template modules designed in line with your design specifications

- Layout and design principles based on your style guide
- Available features in the Template Kit can be integrated into individual templates

Coupon system

Coupon system lets you reward mailing recipients with promo coupons. Adding a machine-readable bar code to your mailings will allow your customers to redeem coupons at their local store.

- Upload static coupon blocks – if you want to define the structure of individual codes and number of codes per block
- Dynamically generated coupon blocks – if you want Episerver Campaign to automatically generate a new, unique coupon code for every email
- Bar code blocks with editable layouts (width, height, line weight) based on EAN 13
- Static block thresholds for triggering mails
- Delete unused codes from static blocks
- Download coupon code assignments

Countdown timers

Countdown Timers display the days, hours, minutes and seconds remaining to when your offer ends to increase the attention of your recipients and conversion rate.

- Supports static and animated countdown timers
- Editor for designing, editing, and managing countdown timers
- Field function for mailing integration

Segmentation

Target groups

Successful dialog marketing: Target, attract, inform and engage your customer segments with custom content. Episerver Campaign helps you define target groups to ensure that your mailing content and subject lines are relevant to every one of your recipients.

- Recipient-based filter criteria, which can be based on any recipient list field
- Action-based criteria, such as clicks, open, hard and soft bounces, and post-clicks
- Campaign-based criteria for linking several marketing automation campaigns
- Use of operators: contains, starts with, ends with, equals

- Use of mathematical operators for numeric fields
- Use of time-based operators for date fields
- Boolean operators (`true` or `false`)
- Instant target group analyses
- Ad-hoc target groups created from Live Analytics segments with a single click

Click profiles

Categorize your recipients' clicking behavior with click profiles. Rule-based click profiles provide information about your campaign's performance, instead of complex individual mailing and campaign analyses.

- Cross-campaign click profiles
- Manually assign click profiles
- Rule-based click profile assignments based on wildcards
- Rule-based click profile assignments based on regular expressions

Analysis tools

Performance Dashboard (Beta)

The Performance Dashboard (Beta) lets you display KPIs using charts for visually appealing presentations of your mailing activities.

- Various charts available: KPI chart, basic chart and bubble chart
- Time-based and mailing-based analysis
- Individually customizable

Live Analytics

Live Analytics lets you generate recipient-based reports and create real-time RFM analyses to boost your campaigns' profitability and return on investment (ROI).

- Analyze data by recipient lists, list fields, and target groups
- Edit analysis fields in real time in the detail view
- RFM analyses for boosting your sales
- Graphical representations and segmentation
- Funnel analysis segments of a diagram with a single click
- Create target groups with a single click

Deep Analytics

Deep Analytics provide in-depth and highly detailed mail-based reports about your campaigns' success to effectively targeting your recipients and further develop your omnichannel marketing.

- User-friendly report builder with graphical interface
- Create reports with drag and drop
- Choose from up to 28 analysis measures
- 13 groupings
- Predefined basic reports for campaign and progression-based analyses
- Automatic raw data analyses for reports based on high-performance database algorithms
- Post-click analyses with external web analytics tools
- Global report parameters based on clients, time intervals, target groups, mailings and mailing types
- Choose from different diagrams (bar charts, line charts, regional and pie charts)
- Aggregation of comprehensive reports in pivot tables
- Seamless integration with Microsoft Excel
- Configurable report templates in your corporate design
- Automatic report generation and distribution by email

Deliverability preview

The deliverability preview lets you check your mailing before dispatch, whether the contents are displayed correctly and whether your mailing has been classified as spam by the most common email providers.

- Preview how the graphics and fonts in your mailing are displayed by the most common email providers and browsers
- Check spam suspicion with the most common email providers

Post click tracking

Post-click tracking lets you analyze actions by email recipients on your website, like clicks on products or canceling of orders. Use Deep Analytics to analyze and display the generated data.

- Filter by date or time range
- Import mailing-independent customer actions
- Integrate external web analytics software

Visual link analysis

Visual link analysis instantly shows the number of times the links in a mailing were clicked. The analysis is performed directly inside the mailing itself, which means that you can see whether links in particular locations are clicked more or less frequently.

- Analyzes absolute and unique clicks
- Proportional analysis based on recipients or clicks
- Visual link analysis of post-clicks

Attention analysis

Attention analysis let you assess the impact of your mailings, templates, and landing pages' layout on viewers. Based on eye-tracking, this tool graphically represents analysis results which indicate if the most crucial elements of your mailing (logo, offer price and period, call-to-action) are located to effectively attract the viewer's attention.

- Perception map analyzes which features of a mail a viewer focuses on first
- Attention map for analyzing which elements in your mail attract the most attention
- Visual attention prediction for predicting the order in which mailing elements attract attention
- Analysis of draft layouts of existing mailings or screen shots means layouts can be optimized during the design phase

Activity overview

Activity overview shows mailings for a defined period in a single, clearly laid-out screen. This lets you obtain information relevant for evaluating your marketing activities, such as which customer dialogs you have sent, are currently sending, and are about to send.

- Evaluate multiple clients at once
- Filter by mailing types, media types and mailing status
- Transactional mails and registration confirmations are supported

Integrations and additional functions

Episerver Campaign seamlessly integrates all major web analytics, e-commerce and CRM systems. You can use programming interfaces (APIs) and extend Episerver Campaign with various additional functions. In addition, Episerver constantly develops new custom features for you.

Web analytics integration

Episerver Campaign seamlessly integrates commonly available web analytics tools. Benefit from bi-directional data exchange: The most important statistics are sent to the analytics software, and segments relevant for your Episerver Campaign remarketing campaigns are available in the feedback channel.

Adobe Analytics

When using Adobe Analytics integration, tracking data from your online shop is sent to Episerver Campaign. User actions and product data from Adobe Analytics are available for creating remarketing campaigns in Episerver Campaign. Bi-direction data exchange also sends mailing and campaign parameters and recipient actions to Adobe.

- Bi-directional data exchange
- Tracking of standard actions: product purchase, product view, and abandoned shopping carts
- Tracking of standard variables: item number, order, quantity, and price
- Freely configurable user-defined variables for sending additional data, such as reviews and registrations
- Grouping of mailings within a campaign for aggregated post-click evaluation

Google Analytics

You can use Google Analytics to monitor the success of your marketing campaigns and further optimize them. Episerver Campaign sends mailing and campaign parameters to Google Analytics. The Google Analytics dashboard gives you access to campaigns and an overview of the costs and revenues related to your campaign.

- Unidirectional data exchange
- Mailing ID, mailing name and description, mailing type, and dispatch date are transmitted
- Recipient list fields are transmitted
- Time and campaign-based analyses available in Google Analytics

Google Tag Manager

With Google Tag Manager you can implement tracking codes and conversion pixels on your website and create data about user actions. By using the integration you can transfer this data to Episerver Campaign.

- Identification of customers/recipients via the RecipientID
- Data transfer to Episerver Campaign
- Creation of target groups in Episerver Campaign

intelliAd

IntelliAd integration for Episerver Campaign lets you evaluate your email campaigns using intelliAd.

- Unidirectional data exchange
- Link tracking using link extension
- Analysis of clicks over time for just the email channel or together with other marketing activities in the intelliAd dashboard

E-commerce integration

Securely send order and dispatch notifications, double-opt-in emails, or entire campaigns. Seamless and automatic **E-commerce integrations** with Episerver Campaign matches recipient data and recipient status and imports product data directly into your newsletter template. You further benefit from the performance and reputation of Episerver's dispatch infrastructure.

Magento 1 integration and Magento 2 integration

Take advantage of the performance available from Episerver Campaign in combination with the Magento e-commerce platform. The Integration includes synchronization of recipient data including logins and logouts, export of the product catalog, and sending transactional mails via SMTP and HTTP.

- Available for Magento CE 1.7 to 1.9, Magento EE 1.12 to 1.14, Magento CE 2.0 to 2.1
- Processing of subscriptions and unsubscriptions via Episerver Campaign
- Synchronization of recipient status between the shop system and Episerver Campaign
- Transfer of further recipient data from the shop to Episerver Campaign to personalize your mailings
- Adaptability of the data model for data exchange
- Multi-client capability through support of subshops and storefronts
- Sending transaction mails via the SMTP API
- Sending transaction mails via the HTTP API using the templates in Episerver Campaign
- Export of the product catalog as CSV file for use during mailing creation
- Configurable confirmation pages
- Transfer of further data fields from the web shop to Episerver Campaign for further personalization of your mailings

CRM integration

Bi-directional **CRM integration** lets you send campaigns to your contacts and leads using Episerver Campaign. Personally address your customers with customized content and evaluate the success of your campaigns directly from within your CRM system.

MS Dynamics CRM

Plan, start, evaluate successful campaigns in MS Dynamics CRM and benefit from the power and above-average delivery rates of Episerver Campaign: Use your comprehensive CRM database to create email and SMS newsletters with high conversion rates. Use your data to generate extensive and original customization. Delivery and a perfect layout are guaranteed. The bi-directional connection means you can monitor success directly from within your CRM system.

- Available for MS Dynamics CRM and On-Premises
- Supports MS Dynamics CRM versions 2013, 2015 and 2016
- Omnichannel campaigns via email and SMS
- High-performance dispatch infrastructure with excellent delivery rates
- Precisely measure the success of CRM campaigns
- Transfer personal data from the CRM such as salutation, name, city and post code
- Import response data in your CRM such as openings, clicks, returned emails, canceled subscriptions and bounces

Salesforce

Plan, start, evaluate successful campaigns in Salesforce and benefit from the power and above-average delivery rates of Episerver Campaign: Use your comprehensive CRM database to create email and SMS newsletters with high conversion rates. Use your data to generate extensive and original customization. Delivery and a perfect layout are guaranteed. The bi-directional connection means you can monitor success from within your CRM system.

- Available for Enterprise Edition, Unlimited Edition, and Performance Edition
- Omnichannel campaigns via email and SMS
- Export standard segmentation and personalization fields from Salesforce into Episerver Campaign
- Export additional customer-specific fields to Episerver Campaign
- Multi-stage campaigns in Salesforce
- Automatic response data synchronization

APIs

Smart and flexible: Episerver Campaign offers a range of comprehensive programming interfaces (APIs) to automate your marketing activities.

REST-API

The REST API is a convenient alternative to the SOAP API that lets you manage and control Episerver Campaign features from external systems by using HTTPS requests. In contrast to the SOAP API, you can also

manage Smart Campaigns. In total, Episerver provides more than 200 operations in over 16 different web services for this purpose. You can retrieve data from and send data to Episerver Campaign via REST API. See the Episerver Campaign SOAP API documentation for information.

- Bi-directional secure data exchange
- Almost all features of Episerver Campaign can be executed
- Over 16 web services and more than 200 operations available
- Supports multiple languages and formats such as HTTPS, JSON, URL and XML

SOAP API

The SOAP API lets you control Episerver Campaign from external systems using a variety of programming languages and environments. More than 250 operations in 18 different web services are provided for this purpose. The interface is bi-directional. Data can be both retrieved from and sent to Episerver Campaign. See the Episerver Campaign SOAP API documentation for information.

- Bi-directional secure data exchange
- Almost all features of Episerver Campaign can be executed
- 18 web services and more than 250 operations available
- Episerver Campaign provides pre-configured programming libraries for Java and PHP to make connecting external systems easier

HTTP API

The HTTP API can be used to register new recipients, manage blacklists and subscription cancellation lists, for personalized tracking and for sending trigger and transactional mails – also with personalized attachments. The HTTP API operations can be embedded into emails, web forms and online shops. See the Episerver Campaign HTTP API documentation for information.

- Secure integration and data exchange
- Easy to configure API calls
- Confirmation of execution is returned for each operation
- Can be used in emails and web forms
- Transfer personal data for sending personalized transactional mails
- Personalized attachments (for example PDFs)
- High-performance transactional API for high volume dispatch

SMTP API

The SMTP API offers a simple solution for sending campaigns via the high-performance infrastructure and lets you benefit from the reputation of the Episerver Campaign server. After setting up a special SMTP client, you can continue to create your mailings using your usual software package. Mailings are sent via Episerver's high-

performance server that is recognized by major providers. You benefit from the reputation and performance of Episerver Campaign with minimal modifications.

- Above-average high email delivery rate and sender reputation
- Monitor the mailing process using Episerver's deliverability experts
- Seamless integration into existing system architectures
- Mailing creation and recipient management continue to be carried out in your current system—no need to retrain staff

Additional interfaces

Content interface

Link external product databases to the content interface or content management system to display your shop products in your mailings. Just a few clicks are needed to create your product offer: the Episerver Template Kit provides pre-configured paragraphs for linking and creating layouts for product data according to your corporate design guidelines.

- Product paragraph for embedding individual products
- Content interface paragraph for embedding several grouped products
- Up to 10 text elements per article
- Up to 3 links per article
- Up to 6 images per article
- XML and CSV formats
- HTML/CSS formatting

Translation interface

The translation interface from Episerver Campaign lets you send the texts for your mailing to a translation service provider. The service provider returns the translated content. Your mailing templates apply the relevant language to ensure that a localized mailing is sent to each target market.

- Data exchange using standard XML format
- Link to practically all translation providers
- Automatic creation of mailings in target language
- Automatic requests for the status of a translation ensures that mailings are only sent when the translation is complete

Closed-loop Interface

The bi-directional and flexible closed-loop interface lets you integrate data from your data warehouse or campaign management system into Episerver Campaign. The import module is used to send selected recipients and personal data to Episerver Campaign. A mailing filled with this data is then sent. The export module provides send and response data for the feedback channel. This data is automatically fed back to your system.

- Secure data exchange over SFTP or SOAP API
- Import and export using the standard CSV format
- Referencing of content, for example, image stored on remote systems possible
- Import personalization information and product recommendations
- Automatically generate a send log and response data (openings, clicks, returned emails, canceled subscriptions) for export to the feedback channel

FTP interface

This high-performance and universal interface lets external data storage systems to securely synchronize with Episerver Campaign.

- Import and export large amounts of data in CSV format
- Secure data transfer via an SFTP connection
- Import data at regular intervals or when changes are made
- Automatic further processing of data by clients
- Import and export recipients, canceled subscribers, blacklists and multiplier lists

Dispatch and deliverability

Dispatch

You can send messages (even high volumes of messages) immediately or use delayed dispatch. You can also split messages and send different content to different target groups.

In addition, you can test every message before sending it. To do so, select a number of test addresses and lists, start separate tests for text, HTML, and multi-part messages, and simulate the messages' dispatch to the different groups.

- Sending speeds of up to 50 million emails per hour
- Throttled dispatch (for example, for campaigns likely to drive a high level of traffic to your online shop). Throttled dispatch lets you control and manage follow-up traffic.
- email can use international ISO-8859-1, ISO-8859-2 or UTF8-compliant character sets

- SMS message routing to 12 countries

  - SMS delivery using international GSM and UCS2 data coding

    Note: The following features are optional. Contact customer support for more information.

  - Target group-based SMS delivery to specific regions using telephone dialing codes
  - SMS delivery with sender recognition using individual short codes (on request, exclusive code) or long codes

Send time optimization

Customize the time your messages are sent. The send time optimization identifies when your recipients interact with their inbox, and sends your message when they are most attentive.

- Available for Smart Campaigns
- Available for A/B tests
- Self-learning algorithm, continuously adapts to recipient behavior
- Very flexible, virtually infinitely adjustable for up to 7 days
- Analysis function evaluates individual dispatch times
- Fallback time for new recipients for whom behavior data is not yet available

Deliverability management

Episerver's deliverability team monitors mail delivery and takes proactive action to ensure high sending rates. This includes collaborating with providers and organizations to develop optimal strategies for improving deliverability – regardless of the growing complexities of spam filters. See also Best practices for good deliverability.

- Active deliverability management and monitoring
- On-boarding deliverability – Episerver's deliverability team performs an advance analysis of the requirements for ensuring the deliverability of your messages
- Episerver is a member of the Certified Senders Alliance (CSA)
- Provider relations and Episerver server whitelisting ensure high delivery rates
- Mails comply with formatting standards for email headers and HTML
- Automatic steering of the optimal sending speed – ensuring that emails are accepted by providers
- Automatic server switch in case of delivery problems to prevent email loss during sending
- Blacklist monitoring – Episerver's deliverability team constantly monitor the blacklists of major providers and takes immediate action if an Episerver IP is accidentally listed there
- 24/7 open and click rate monitoring and provider comparisons for messages

> **Note:** The following features are optional. Contact customer support for more information.

- Progression analysis of open and click rates in your clients to identify and resolve deliverability issues
- SSL certificate for your sending domain
- Multiple sending domains for your use
- Dedicated IP pool for your exclusive use

Security and availability

You benefit from maximum data safety and consistent Episerver software and service availability.

- ISO 27001 certified by TÜV to guarantee the security of the operation, service, and development of the software
- Hosted in a Tier IV, high-security data center
- Redundant server structure
- Continually updated firewall hardware for blocking hackers
- SSL-encrypted connections
- Split-second main database replication
- Daily data backup
- Automatic application and service availability monitoring
- 24/7 system administrator helpline

Recipient management

Systematically collecting and analyzing customer data is key to running effective email and omnichannel campaigns. Episerver Campaign comes with a number of options for processing different data sources and using these to boost your performance.

- Easy-to-use list-based recipient management
- Unlimited number of potential recipients
- Unlimited number of recipient lists
- Recipient list fields in the data types string, integer, float, date and boolean
- Manual recipient import using standard CSV
- Automatic duplicate identification during import
- Automatic data validation during import (mandatory fields, correct email addresses and so on)

- Download of duplicates and faulty datasets for reviewing and archiving purposes
- Export complete and filtered recipient lists
- Integrated subscription process based on double opt-in or confirmed opt-in emails
- Tracking-opt-out option that enables recipients to disable personal data tracking in accordance with statutory regulations. This does not impact anonymized campaign-specific data tracking.
- Integrated unsubscribe request management in accordance with statutory regulations
- Fully integrated unsubscribe links in mailing templates
- Records subscriptions, opt-ins, and unsubscribe requests with IP and time stamp for your records
- Recipient data enrichment with third-party system data, such as web analytics, CRM, e-commerce, recommendation engines, and other data sources using high-performance automated interfaces
- Recipient history: Entire message history for each recipient in an easy-to-read format, including action data (opens and clicks)

> Note: The following features are optional. Contact customer support for more information.

- Automatically import and export recipients using FTP protocol and standard CSV file
- Recipient data encryption
- Subscription form
- Preference Center form
- Delayed subscription confirmation emails
- Separate recipient list data storage available on request
- Development of an individual data management concept by Episerver consultants

Blacklist

Recipients whose email addresses are on the blacklist are no longer sent any mails. This also applies if these recipients subscribe to emails again later, even if they do so multiple times.

- Client-wide blacklist
- Blacklist inheritable by sub-clients
- Manually add recipients to the blacklist
- Manually import blacklisted recipients from a CSV
- Search the blacklist for datasets
- Delete datasets from the blacklist
- Use of wildcards to block entire domains or email addresses using key words
- Global blacklist with email addresses that may not be contacted
- Automatic feedback-loop recognition and addition to blacklist
- Automatic external blacklist cross-checks via interfaces or linked databases

Returned email and bounce management

Regardless of whether they are hard or soft bounces, or genuine replies, Episerver Campaign automatically filters and processes returned email by category.

- Integrated returned email management with a display function for viewing returned email or returned email associated with a specific mailing
- Automatic returned email analysis using more than 150 filter rules
- Automatic hard bounce, soft bounce, autoresponder, genuine reply/other, suspected spam categorization
- Create special categories using defined rules, for example, returned emails that contain the word order
- On request, returned emails from selected categories can be forwarded to freely selectable email addresses
- Content display and print function for returned emails or genuine replies
- Integrated bounce management divided by hard and soft bounces
- Recipients are disabled when reaching the specified bounce limit to protect the reputation of your mailings
- Individually adjustable bounce limits for hard and soft bounces
- Bounce statistics for email and SMS

System user and permission management

As the administrator of your client, you can create new users and define user permissions down to the smallest detail.

- Assign each user up to 214 permissions
- Easy-to manage user roles
- Assign permissions and user roles for specific periods
- Assign each user permissions for every client
- Assign each user a number of user roles for every client
- User permissions are inheritable by sub-clients
- Assign permissions separately for every channel/media type (email, Mobile Push, SMS)
- Password and PIN-protected user logins
- Users can change passwords

User interface

Smart and intuitive: Easy to use despite its wide variety and depth of functions.

- User interface available in five languages (German, English, French, Dutch and Polish)
- Can be accessed from any computer with internet connectivity
- Supports standard browsers (Internet Explorer/Edge, Firefox, Chrome, Safari) and operating systems (Microsoft Windows, macOS)
- Intuitive buttons
- Single sign-on for clients
- Capable of performing features and actions in parallel
- Users can switch between features
- Fast response times thanks to innovative technologies (such as AJAX)

Service

Working with Episerver Campaign means benefiting from the advantages of powerful and intuitive software, and comprehensive customer service and support services.

- Expert customer services delivered by project managers, engineers, and strategy-oriented marketing experts
- Multilingual customer services in German, English and Polish.
- Helpline team available Mon-Fri, 9 AM - 6 PM CET, by telephone, email and fax
- Free regular webinars
- Manuals, specialist documentation, and best practice guides
- Manuals available offline as PDFs

> **Note:** The following services are optional. Contact customer support for more information.

- Full-service campaign package. On request, Episerver offers complete project management of your newsletter mailing campaign – from creating to analyzing your campaign
- Customized campaign strategies, designs and analyses with Episerver consulting
- Knowledge transfer in practice-oriented seminars and workshops

⬚ Campaigns

This section shows how to create, edit, or test campaigns and send out mailings through channels: email, text messages and push messages. It includes the steps involved in putting together one-shot campaigns or a Marketing Automation system.

- **Smart Campaigns**. Create, edit, and send one-shot campaigns.
- **Omnichannel campaigns**. Special notes for push messages and SMS.
- **Marketing Automation**. Automate campaigns.
- **Transactional mails**. Set up and edit transactional mails.
- **Confirmations**. Edit opt-in emails.
- **Message templates**. Create and edit message templates.
- **Sending a split mailing**. Set up and execute A/B tests.
- **Send time optimization**. Deliver your message at the exact moment when recipients open their inbox and read their email.
- **Validate mailing prior to dispatch**. Information on the automatic parameter test before dispatch.
- **Send automatic notification after dispatch**. Information on automatic notification after dispatch.
- **Mailings Classic**. Information about the classic, one-shot campaign. (This feature is deprecated and replaced by functions of Smart Campaigns)

⬚ Smart Campaigns

Smart Campaigns is a tool for sending out one-shot-campaigns, such as a monthly newsletter. In Smart Campaigns, you can send messages via all channels: email, **Mobile Push**, and **SMS.**

Use Smart Campaigns to create, start, monitor and evaluate regular campaigns. You create and edit these campaigns on a graphic desktop, and access the elements that make up a campaign (recipients, target groups, A/B test and the message) from the tool list in the left panel.

To work with Smart Campaigns, go to start menu > **Campaigns** > **Smart Campaigns**.

A list of Smart Campaigns appears in the top half of the window. The **Status** column shows whether a campaign was activated or sent. The lower half of the screen displays the selected campaign.

Because a Smart Campaign's elements and parameters are displayed visually, you can easily control and optimize it. After you activate a campaign, the Smart Campaigns working area displays feedback on it.

Campaigns and messages

Every Smart Campaign must have at least one message. Both campaigns and messages appear in the Campaign Overview in the **Smart Campaigns** window. A message begins with three dots (…) and is located below its campaign. The following conditions and relationships apply:

- A message must belong to a campaign.
- To send a campaign, you must include a message.
- A message's media type (email or SMS) must match its campaign's media type.
- If your campaign uses the **A/B test** (split test) node, you must create two versions of the message. See Sending a split mailing.

Campaign type

You can select from the following campaign types, each of which is sent via different channels. A Smart Campaign's recipient list must be compatible with its delivery channel.

- **Email**. Sends email to recipient of type **Email** or a multiple list.
- **SMS**. Sends SMS message to recipient of type **SMS** or a multiple list.
- **Mobile Push**. Sends push notification to the Android or iOS device to a recipient of type **Push** or a multiple list.

Campaign status

- **Incomplete**. Elements are missing or necessary parameters are not defined. You cannot activate or start a campaign in this status.
- **Activation required**. Contains necessary elements and parameters. To send campaigns manually, activate the campaign before starting it.
- **Activated**. The campaign is activated and can be started (sent). Campaigns with a specified sending time are sent automatically when activated.
- **Sending**. A campaign 's messages are being sent.
- **Paused**. The sending process is paused manually, or the splits of an A/B test with manual optimization are ended. Click **Start** to restart the campaign or **Cancel** to end it.
- **Canceled**. The campaign is canceled and cannot be restarted.
- **Sent**. The campaign is sent.

Actions

Use the buttons below the campaign overview to perform these actions:

- Create
- Copy
- Edit
- Delete
- Start/Activate
- Copy to client
- Analyses/Preview

> **Note:** Some actions are not available for incomplete or sent campaigns.

Create

Creates a new campaign. See **Creating and editing a campaign**.

Copy

1. Click on a campaign in the list.
2. Click **Copy**.

Use **Copy** if you regularly send similar campaigns. You can quickly make minor adjustments to values in the copied campaign. Campaign elements (recipients, target groups, messages, and so on) are applied.

> **Note: Limitations**
>
> - Individual messages in the list cannot be copied.
> - Messages are not stand-alone; they belong to a campaign.
> - You can reuse messages by selecting a message in the Selecting the type of content step.

> **Note:** To migrate Mailings Classic mailings to Smart Campaigns, see Mailings Classic.

Edit

To edit a campaign:

1. Click on a campaign in the list.
2. Click **Edit**.

See also Creating and editing a campaign.

To edit a message:

1. Click on a message in the list.
2. Click **Edit**.

> **Note: Limitations**
>
> - Sent campaigns cannot be edited.
> - Individual messages cannot be copied.
> - Messages belong to a campaign.

Delete

To delete a campaign:

1. Click on a campaign in the list.
2. Click **Delete**.

To delete a message:

1. Click the campaign to which the message belongs.
2. Click **Edit**.
3. Hover over the message node and click 🗑 .
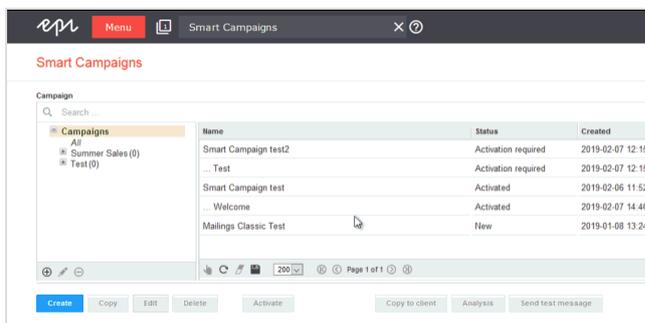
> ### Note: Limitations
>
> - Sent campaigns cannot be deleted.
> - Individual messages cannot be deleted.
> - Messages belong to a campaign.

Start/Activate

After a campaign is completely defined, its status changes to **Activation required**, and the **Activate** button appears.

Before you can start a campaign, you first need to activate it.

1. Select the campaign and click **Activate**.

> **Warning:** After you activate a campaign, messages linked to a **Wait** node are automatically started at the specified time.

2. Click **Activate campaign** in the dialogue. The button changes to **Start**.

> **Tip:** When activated, the campaign is validated along with parameters (recipients, target groups, message).

3. Click **Start** to begin sending a campaign's messages with the specified parameters (target groups, reductions in sending speed, and so on).

- You can activate campaigns only, not messages.
- Incomplete campaigns cannot be activated or started.
- You can start either a campaign or its associated messages.

A/B tests on starting/activating a campaign

If a campaign includes an A/B test, you will be able to start the splits for this campaign individually.

If you have selected the **Start optimization manually** option in the A/B test, then select all campaign splits after the campaign has been sent, and then click **Optimize** to send the optimized message to the rest of the distribution list.

Copy to client

> **Note:** Contact customer support to activate this feature.

Copy campaigns to other clients. Recipient lists and target groups are not transferred to the target client.

> Note: Prerequisites
>
> - The registered user must have permission to create mailings in the target client.
> - The target clients must have the template used in the campaign that you want to copy.

1. In the Campaign Overview, select the campaign and click **Copy to client**. The **Copy campaign to client** window opens.
2. In the **New campaign name in the target client** field, enter the name for the copy of the campaign in the target client.
3. In the **Target clients** area, select the client to which you want to copy the campaign.

> **Tip:** To select all available target clients, check the box in the menu bar.

4. Click **Copy**.

Analyses/Preview

To display the dispatch performance or to display various previews, perform these steps.

1. In the Campaign Overview, click a campaign then **Analysis**. The **Campaign analysis** window opens.
2. Click **Start new analysis**. At the top right, a summary of the campaign is displayed. Additionally, the number of recipients is displayed for each individual node.
3. To view the order reference for a print message, in the message node, under **DPAG order reference**, click **Details**. See Viewing the DPAG order reference.
4. To view the **Send time optimization overview** (additional feature), click the corresponding **Wait** node or **A/B test** node.
5. To preview the message, click the corresponding message node. A preview opens to the right.

The following options are available in the preview:

- 📁. Displays available subject lines.
- **Target groups**. When active, select one or more target groups and click **Submit selection** to display only the paragraphs assigned to the selected target groups.
- 👤 and 🚫. The buttons only become active when you use a target group in at least one paragraph.

    ○ Click 👤 to show the respective assigned target groups in the individual paragraphs.

    ○ Click 🚫 to deactivate the display of assigned target groups.
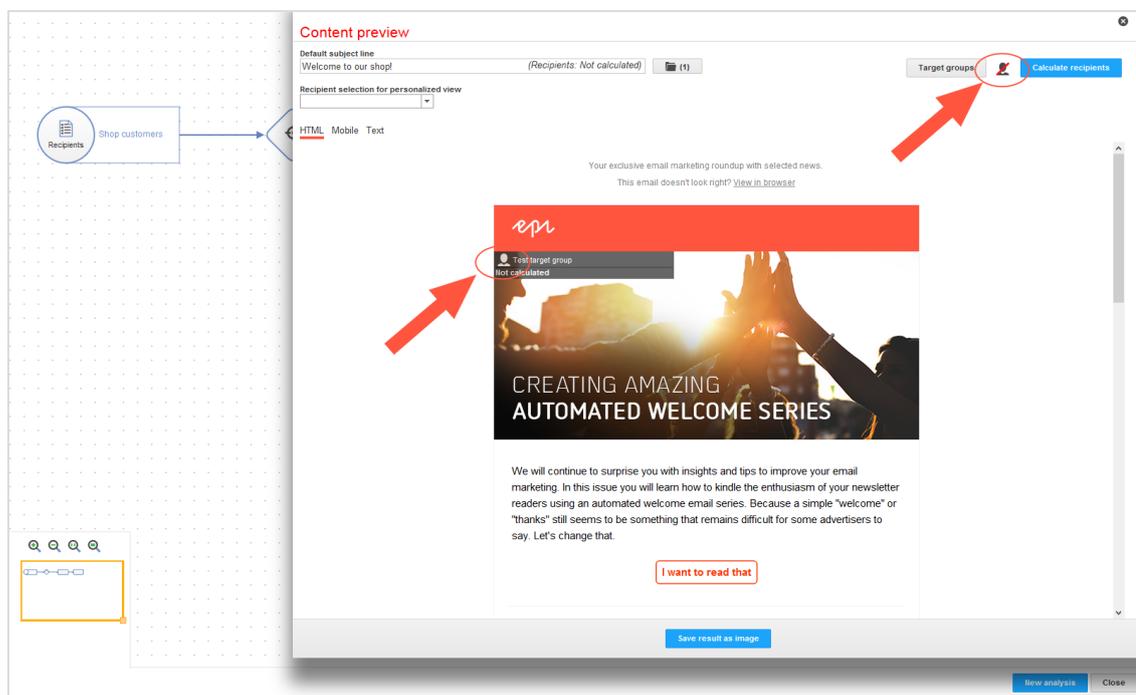
If you do not want to enable or disable the display of target groups, but rather just the display of a single target group, click the relevant paragraph 👤.

- **Container paragraph**. Paragraphs that contain several sub-paragraphs with their own target groups are marked in the content preview as **container paragraphs**. Container paragraphs are highlighted with a yellow border.
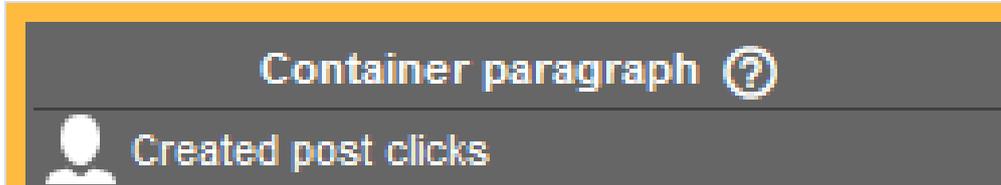
> **Note:** The target groups applied in container paragraphs are automatically carried over to sub-paragraphs included. If you hide target groups in container paragraphs using the button **target groups**, not only is the container paragraph hidden, but also the sub-paragraphs it contains.

> **Note:** Paragraphs that contain several sub-paragraphs without their own target groups are not marked as **container paragraphs** or highlighted in yellow, but instead are displayed with a simple gray banner. However, the target groups for these paragraphs are also carried over to sub-paragraphs.

- **Recipient selection for personalized view**. To display a personalized preview with the data of a specific recipient, in the left column, select a recipient list. Then, in the right column, select the recipient.
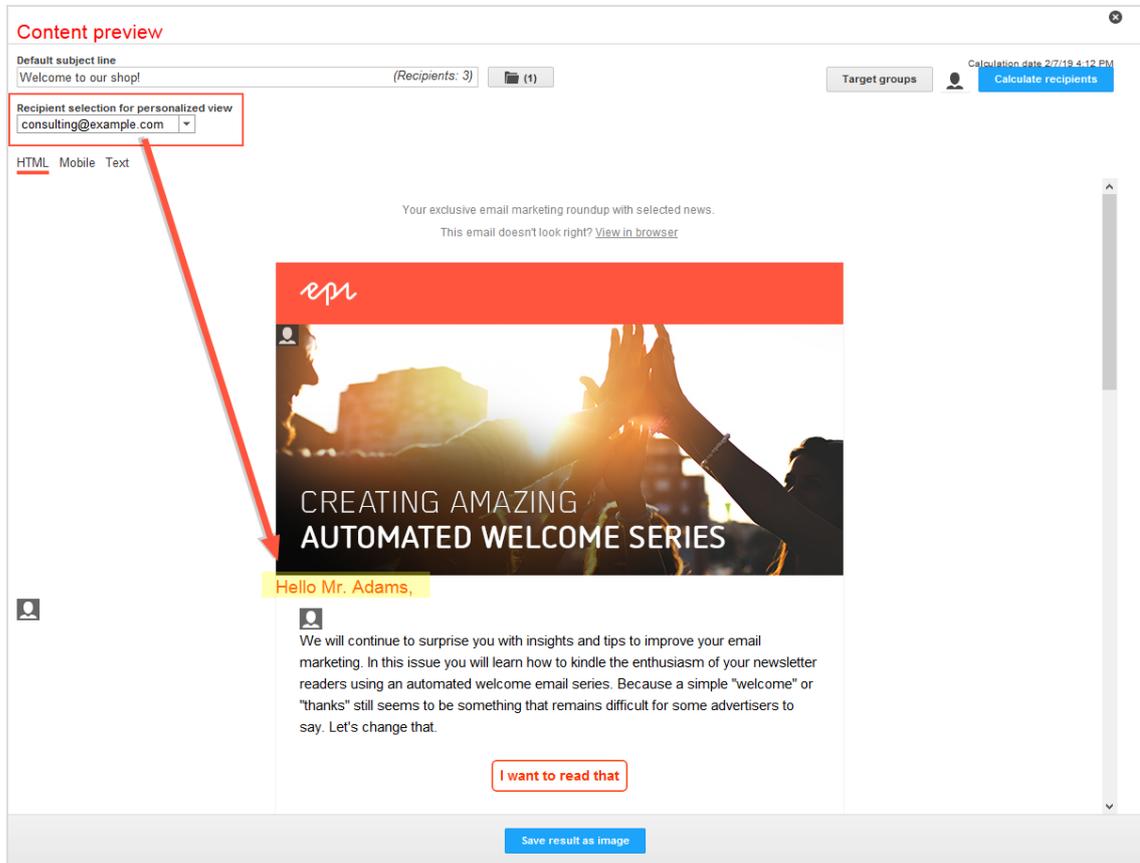
- **Change view**. The tab bar on the upper left border includes the HTML, mobile and text message previews. In the HTML preview, the mailing appears as it will later appear in the recipients' inboxes. Under the **Mobile** tab, you can view the message as it appears on mobile devices. The **Text** tab displays the automatically-generated text version of the mailing.
- **Save result as image** or **Save result as PDF**. Click to save the content template as an image.

Creating and editing a campaign

To summarize the steps to create a campaign in Smart Campaigns:

1. Drag elements to the desktop.
2. Create links among elements.
3. Enter parameters for each element (such as: recipient list, target group name, optimization parameters for A/B tests, and message content).
4. Start the campaign.

The rest of this section fills in the details of this process.

Creating a campaign

1. Go to start menu > **Campaigns** > **Smart Campaigns**.
2. Click **Create**. The **Select campaign draft** window opens.
3. In the **Draft** drop-down list:
   - To create a new campaign, click **---Empty draft---** then **Apply**.
   - To edit an existing draft, select one from the drop-down list and click **Apply**.
4. Drag the campaign elements (**nodes**) from the left action area to the working area on the right.

   Required elements.

   - **Recipients**
   - Message (**Email**, **SMS**, or **Mobile Push**)

   Optional elements.

   - **Wait**
   - **Block**
   - **Throttle**
   - **Limit**
   - **Insight Segment**
   - **Target groups**
   - **A/B test**

   > **Tip:** For details, see **Smart Campaign nodes and elements**.

5. Click **Save** or **Save and close**.
6. In the dialog box, enter a name for the campaign and click **Save**.

   If you neglect to insert elements or parameters, a notification appears. To save the campaign anyway and complete the missing details later, click **Force save**, or **Keep editing** and complete the missing details. The new campaign is displayed in the Smart Campaigns overview.

Editing a campaign

To edit an existing campaign, select the required campaign from the list in the **Campaigns** window and click **Edit**. Proceed as described from step 4 in the **Create campaign** section.

Selecting drafts

When you create or edit a Smart Campaigns, a draft version is saved periodically. If the campaign is closed unintentionally, you can retrieve the latest version. To do that, click **Create** and select the draft from the **Select campaign draft** window.

> **Note:** Drafts are saved with the date and time. You can use the timestamp to find even unnamed campaigns that have not been manually saved.

Editing nodes

The campaign modules for Smart Campaigns are called nodes, and they appear in the left action area. To insert desired nodes into a campaign, drag and drop them onto the desktop.

A campaign node must connect other nodes. Editing options for nodes and connections include:

- **Insert**. Drag and drop a node to the working area.
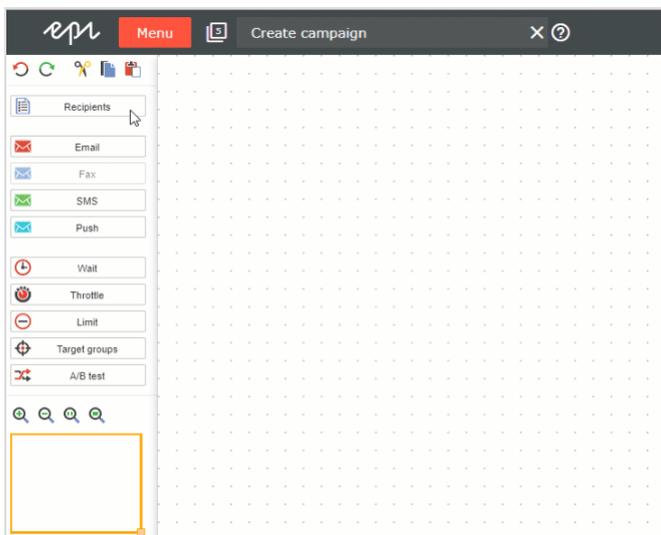
- **Connect**. Click the node and draw a connection to the target node. Each node has connection points at the right, left, upper, and lower side and in the middle.
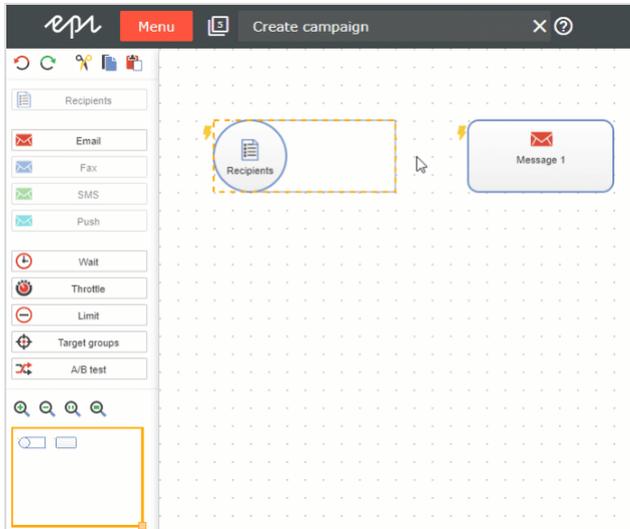
- **Delete**. Hover over the item and click 🗑. Alternatively, select the item and press **[Del]**.

- **Properties**. Hover over the item and click ✏. Alternatively, double click the item.
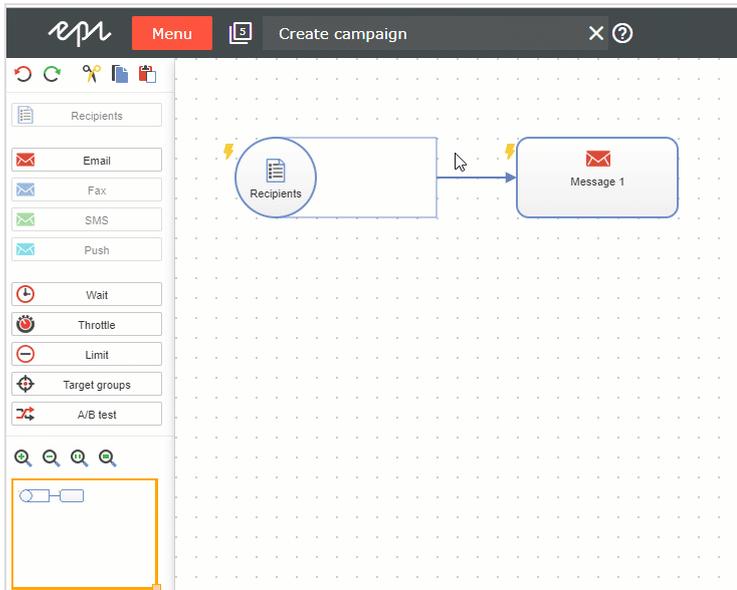
Editing tools

- ↺ Undo (CTRL + Z). Revoke the last action. Every additional click revokes another action.
- ↻ Redo (CTRL + Y). Restore previously-revoked action. Every additional click restores another action.

- ✂ **Cut (CTRL + X)**. Cut out selected items and temporarily copy them to the clipboard.
- 📋 **Copy (CTRL + C)**. Copy selected items to the clipboard.
- 📋 **Paste (CTRL + V)**. Insert elements you previously cut out or copied.

Navigating tools

- 🔍 **Zoom in**. Zoom in the working area. Each click magnifies the working area to the next zoom level.
- 🔍 **Zoom out**. Zoom out the working area. Each click reduces the working area to the next zoom level.
- 🔍 **Actual size**. Restore original view.
- 🔍 **Fit on screen** (Show all). Display all items in the working area.
- **Minimap**. Navigate a campaign by dragging the yellow rectangle in the left action area to the place you want to go to. To zoom in or out of the working area using the minimap, click and drag the bottom right corner of the yellow rectangle either to the left (zoom in) or right (zoom out).

Nodes and elements

This topic describes required and optional elements in Smart Campaigns. Nodes define those elements and transfer them to the connected node. By connecting nodes in a logical manner, you define the sequence of activities that make up a campaign.

For example, use the **Recipients** node to select one or more recipient lists and transfer their recipients to the message node. When you start the campaign, this message is sent to the transferred recipients.

Grayed out node

A node may be grayed out for several reasons.

- A campaign already used one media type. For example, if you drag an **Email** node to the desktop, the fax, print and SMS nodes are deactivated.
- You already used that node type. The **Recipients**, **Limit**, **Target groups** and **A/B test** nodes can only be used once per campaign.
- You lack permissions. For example, you have permission to send email campaigns but not SMS campaigns.
- The media type is not configured in your client.

Required elements

A campaign *must* include a **Recipients** node and one of the following message types (Email, SMS, Mobile Push), before you can start it.

- Recipients
- Message (email, , SMS, Mobile Push)

📄 **Recipients**

Parameter	Description
Recipient lists	Select one or more recipient lists to which to send the messages. **Note:** The recipient list type must be compatible with the message type being sent. For example, you can only send a print message to a print recipient list (or a multiple recipient list).

✉ **Email**

Parameter	Description
Name	Enter a name for the message. This name is only used internally.
Description	Enter an optional message description.
Edit content	Click to add content, then perform the steps described in Editing message content.
Test email	1. Click to start a test dispatch. The **Send test message** window opens. 2. In the **Recipient list** drop-down list, select a list with test recipients. 3. If you want to simulate a target group, select a target group in the **Simulate target group** drop-down list.

Parameter	Description
	> **Note:** The test recipients selected in the next step can also belong to other target groups. 4. In the list, select one or more test recipients. 5. Click **Send email** to send the test messages in multi-part format, or click **Send HTML version** or **Send text version** if you want to test only one format.

✉ SMS

Parameter	Description
Name	Enter an internal name for the message.
Description	Enter an optional message description.
Edit content	Click to add content, then perform the steps described in Editing message content.
Test SMS	1. Click this button to start a test dispatch. The **Send test SMS** window opens. 2. In the **Recipient list** drop-down list, select a recipient list with test recipients. 3. In the list, select one or more test recipients. 4. Click **Send SMS** to start the test dispatch.

✉ Mobile Push

Parameter	Description
Name	Enter an internal name for the message.
Description	Enter an optional message description.
Edit content	Click to add content, then perform the steps described in Editing message content.
Test push message	1. Click this button to start a test dispatch. The **Send test message** window opens.

Parameter	Description
	2. In the **Recipient list** drop-down list, select a recipient list with test recipients.
	3. In the list, select one to five test recipients.
	4. Click **Send push message** to start the test dispatch.

Optional elements

You can include the following elements in a campaign.

- Wait
- Block
- Throttle
- Limit
- Insight Segment
- Target groups
- A/B test

⏰ **Wait**

Specifies a message's start time. You can manually activate a campaign containing a **Wait** node. If you do, the messages are sent at the specified time.

> **Note: Limitations**
>
> - **Wait** is **not** available for transactional mails or confirmations.

> **Tip:** Use **Wait** in combination with an A/B test to define the sending time of each split.

Parameter	Description
Wait until…	Specify the date on which a message or split is sent.
at …	Specify the time when a message or split is sent.
Wait until import has finished	If you are using the closed-loop interface, activate this option to send the messages after the recipient import.

Parameter	Description
	Note: If you enable this option, do not activate the campaign.
Start at … after import has been finished	If you are using the closed-loop interface, activate this option to send the messages after the recipient import at the time specified here. **Note:** If you enable this option, do not activate the campaign.

Note: If you use **Send time optimization**, you must also specify a **Wait** option in the **Send date** area as a time reference point. Also, the fallback time is determined for recipients for whom there is not enough behavioral data to determine an optimal send time. See Configuring send time optimization in the Wait node.

Parameter	Description
Send time optimization	Select the check box to enable automatic send time optimization.
24 hours/7 days (only when the selected wait option is **Wait until …**)	Select the period of time during which the send time can be optimized.
Date slider	Use the date slider or the arrow keys to change the start and end times of the send time optimization.

Block

Note: Limitations

- **Block** is **not** available for transactional mails or confirmations.
- **Block** is **only** available for email.
- The **Block** node only functions with custom blacklists.

Suspend recipients on custom blacklists from a mailing. Place the **Block** node in your campaign and click **Properties** ✏ . Then, select one or more custom blacklists from the drop-down list. The recipients on those blacklists will not get a message.

⏱ Throttle

> **Note:** **Throttle** is **not** available for [transactional mails](), or [confirmations]().

Specify the dispatch rate. Sometimes you should select a lower dispatch rate, such as when you send a coupon in email. Unless you reduce the dispatch rate, your online shop may get overloaded.

Parameter	Description
Decrease the dispatch rate	Specify the dispatch rate per hour for messages. The lowest rate is 1000 messages per hour.

⊖ Limit

> **Note:** **Limit** is **not** available for [transactional mails]() or [confirmations]().

Specify how many recipients (percentage or absolute value) you want to contact. Place the Limit element in front of the message node.

Parameter	Description
Percent	Specify the percentage (1 to 100) of recipients to be contacted. The number of recipients is calculated on **the global number of recipients from recipients lists selected in the Recipients node (=100 %)**. Other limiting elements, like target groups, are not considered.
Recipients	Specify the actual number (absolute value) of recipients to be contacted. If this value is higher than the number of possible recipients, all recipients are contacted.

Insight Segment

> Note: Limitations

- This node is **not** available for transactional mails or confirmations.
- To make Insight segments available in Episerver Campaign, you first have to create segments in Episerver Insight. See Creating a marketing segment.

Use marketing segments from Episerver Insight as a target group for your campaign.

To add an Insight segment to your campaign, drag and drop the **Insight segment** node onto the desktop. To edit this node, click **Properties** and select the desired segment from the drop-down list.

⊕ Target groups

Note: **Target groups** is **not** available for transactional mails or confirmations.

Limit the selection of recipients based on additional criteria (see Target group definition). Place **Target groups** between the **Recipients** node and the **Messages** node.

Target groups contains no additional parameters. To specify a target group, create an outgoing connection, click it, and define a target group or select an existing one.

Parameter	Description
Target group	Enter an internal name for the target group and the target group definition. See Target group definition.

⤬ A/B test

Optimize the dispatch of your message. In an A/B test, two variants (A and B) of an email are sent, which differ in a factor (such as the subject line). By comparing key figures (such as the opening rate when testing the subject line), you can determine which variant worked better. See Sending a split mailing.

Note: Limitations

- A/B test is *not* available for transactional mails, confirmations or print messages.
- If you add an A/B test to the campaign, you must create at least two versions of the message. The more successful version (automatically selected by one of these criteria – **open**, **click**, **bounce** or **unsubscribe rate**, or **revenue**, or manually selected) is sent.

You configure the A/B test in two steps:

1. Activate automatic optimization in the **A/B test** node.

Parameter	Description
Activate automatic optimization	Enable to select the most successful message in the splits based on one of the criteria in the following line.
Type of optimization	Select one. • **Best effective click rate**. Sends message with best ratio of unique openings to unique clicks. • **Best unique click rate**. Sends message that generated the highest percentage of clicks from individual recipients. • **Best unique open rate**. Sends message opened by highest percentage of recipients. • **Lowest unique unsubscribe rate**. Sends message that generated the lowest percentage of unsubscriptions from individual recipients. • **Lowest bounce rate**. Sends message that generated the lowest percentage of return messages. • **Highest turnover**. Sends message that generated the most turnover. **Note:** This option is only available if you are using [Post-click tracking](#), or either [web analytics](#) or [e-commerce integrations](#).
Sending date for the optimized message	If you activated the automatic optimization function, select an option to trigger the sending of the optimized message to the rest of the recipients. • **Date and time**. Send your optimized message at a specified time; for example, you always send messages at 3 PM on Thursdays, and your recipients are used to receiving your messages at this time. • **Delay after last split**. Ensure that your recipients have enough time to open a message and to click the links (regardless of when you start the optimization). You can draw conclusions from this for the optimization of your campaign. For example, if your recipients read a message and click links in the first two days following receipt. • **Manual**. Send the optimized message when you want. Then, once splits are complete, click **Optimize** to start the optimization process in the **Campaigns** window.

2. Create the split mailings and connect them with the **A/B test** node.

   A/B test also lets you branch the path of your campaign. For example, to send different messages to different target groups.

Parameter	Description
Priority	Specify to which target group is to be sent first. The branches are processed hierarchically. The branch with the lowest number has the highest priority and is executed first.
Number of recipients	Specify the number of recipients to which the connected split is to be sent: • **Percent**. Specify the percentage of recipients to be contacted. • **Recipients**. Specify the number of recipients to be contacted. • **No limit**. Do not limit the number of recipients.
Target group	Optionally specify which target group is used by referring to an existing target group: a. In the box under **Target group**, enter a name. b. In the **Target group** list on the right, select the desired target group. If you create a new target group, define the filters (see Target group definition). c. Click **Save target group** ✅. The message is sent only to recipients of the selected target group.

- If you filter a target group by actions over a period of time and set an A/B test with different send times, unexpected numbers of recipients may occur. Recipients are always calculated at the actual send time of each A/B test message.
- When you use the send time optimization, you must also specify a date and time or select the **Manual** option under **Sending date of the optimized message**. See Configuring send time optimization in the A/B test node.

Editing message content

To configure a message and add content, move the cursor to the message you want to edit, click **Properties** 🖉 > **Edit content**. The **Edit content** window opens, and you can perform the following steps:

1. Selecting the type of content
2. Configuring the message
3. Adjusting layout settings and content

Step 1. Selecting Content Type
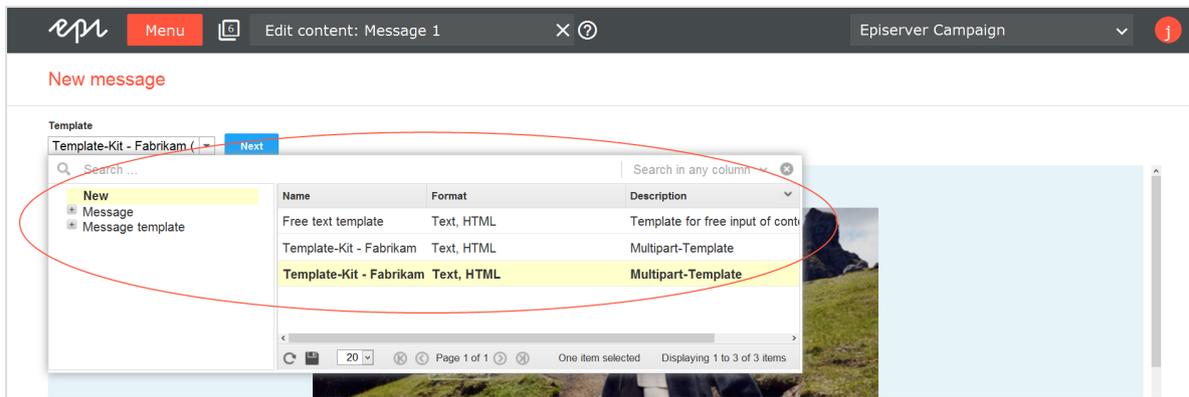
Select the source or template from which you want to create the message:

- Email
- SMS
- Mobile Push

Email

If you edit an email for the first time, select a template:

1. From the Template drop-down list, select one of these options.

   - **New**. Creates a message from a template (for example, the Episerver Template Kit) or enter your own HTML into the free-text template.
   - **Message**. Applies content from existing message you select from the list. You can select new or sent messages.
   - **Message template**. Send messages regularly with the same sender number (such as "Our offers of the week"). Select the required template from the list. The subject, sender information and attachments are already configured in the message templates. If you select this option, go to Configuring the message. See also Message templates.

2. Click **Next**.

SMS

To edit an SMS message, go to [Configuring the message](#).

Mobile Push

To edit a push message, go to [Configuring the message](#).

Step 2. Configuring the message

To send a message, it must be configured. Depending on the selected delivery channel, you need to define sender information and additional parameters.

Email

- Sender information
    1. Open the **Edit content** window. Click **Sender, subject, attachments**.
    2. **Sender** area. Enter the name and email address that you want mailing recipients to see.
    3. **Reply to** area. Enter the reply-to name to be displayed in the recipient's email program.
- Subject

    - In the **Subject** area, enter a subject for your message.
    - You can use personalizations in the subject line, and send messages to target groups with different subject lines.

        - To create personalized subject lines, click **Insert field function** and select the required recipient list field or the required field function from the list.
        - To add a target-group-specific subject line, click **Add subject** and enter the text into the new field. Then, select a target group for whom you want to use this subject line. You can add as many additional subject lines and target groups as you like.

- Attachments

    Select one of the following attachments to messages.

- ○ Attach a previously-uploaded file

  a. Open the **Attachments** tab. Available attachments are displayed in a list.

  b. Click the file that you want to send.

  c. Click **Apply**. You attached the selected file to your message. The name and size of the file are shown below the message's subject.

- ○ Upload files from your hard drive

  a. Open the **Attachments** tab and click **New**.

  b. Select the option **Upload from hard drive** if not already selected.

  c. In the **Select file** area, click **Browse…**.

  d. Go to the file you want to upload and confirm your selection. The **File name** field in the **Properties** area shows the file name. You can change the file name.

  e. In the **Properties** area, in the **Description** field, enter a description.

  f. Click **Save**.

  > **Tip:** Episerver Campaign creates a copy of your file. If you delete the file from your hard drive, the copy remains in Episerver Campaign.

  g. To attach the uploaded file to your message, select it and click **Apply**.

  The file name and size are appear below the message's subject.

- ○ Link to an externally stored file

  a. Open the **Attachments** tab and click **New**.

  b. Select the **Use URL** option.

  c. In the **File selection** area, in the **URL** field, enter the URL that refers to the file.

  d. In the **Properties** area, in the **File name** field, enter the file name.

  e. In the **Properties** area, in the **Description** field, enter a description.

  f. Click **Save**. The file to which you linked is displayed in the **Attachments** area.

  g. To attach the linked file to your message, select the file and click **Apply**. The name and size of the externally stored file appears under your message's subject. Episerver Campaign loads the linked file from the external source shortly before sending and attaching it to your message.

- • Tracking

Openings and links are tracked as standard in both the HTML and text versions of a message. You can apply these settings globally or configure the tracking function for each link in a message. To configure the tracking of openings and clicks, follow these steps.

1. In the **Edit content** window, select **More > Edit tracking links**.

2. To globally deactivate the tracking of opens or clicks, clear the **Track opens** or **Track clicks** check boxes.

3. To deactivate the tracking of links for the HTML version or the text version of the message, click **Tracking disabled** next to **Default setting for HTML links** or **Default setting for text links**.

4. To configure tracking for individual links, click the link in the **Edit tracking links** list then **Edit link**.

5. In the **Track in HTML** column, select one of the following options:

   - **Default setting**. Applies the global settings to this link.
   - **Enabled**. Activates tracking for this link, even if tracking is globally deactivated.
   - **Disabled**. Deactivates tracking for this link, even if tracking is globally activated.

6. Proceed in the same way in the **Track in text** column.
7. Modify the automatically-generated link descriptions in the **Description** column to help decide whether to allocate a link URL to a topic or a landing page.
8. The **Occurrences** column indicates how frequently a link appears in the message.
9. You can enter a click profile for this link in the **Click profiles** column. You can also assign click profiles automatically in a rule-based manner.
10. Click **Apply**.

> ### Note: Using HSTS
>
> If you use HSTS in your web server (to which the links refer), either disable HSTS in your web browser or create an SSL certificate.
>
> For this, provide the following information:
>
> - **Domain**. The domain (such as, "example.com") for which the certificate needs to be created.
> - **IT contact person**. A contact person from your IT department (First name, last name, company name, address, postal code, phone number, email address, and fax number).
> - **Organizational contact person**. An organizational contact (First name, last name, company name, address, postal code, phone number, email address, and fax number).
> - **Administrative email address**. An email address that you use to manage the certificate. An email address that is assigned to your domain is required for this purpose. For example, if you use the domain "newsletter.example.com", the email address must be either "admin@example.com", "administrator@example.com", "hostmaster@example.com", or "webmaster@example.com". Only the local parts "admin", "hostmaster", "webmaster" or "administrator" may be used.

- Encoding

Specify the character set with which you want to encode your mailing. In addition to standard characters (Latin letters, numbers, punctuation characters), the character set also includes special characters (such as

German umlauts). Characters that would be displayed incorrectly or not at all on the recipient's computer can be correctly interpreted in this way. To configure the message encoding, follow these steps.

1. At the top right side of the **Edit content** window, click **More**. Then, in the menu, click **Encoding/Offline HTML**.

2. Select the required character set.

   - **ISO-8859-1**. For recipients in German-speaking regions, Western European countries, and North America.

   - **ISO-8859-2**. For recipients in Central/South-Eastern European countries, for example in Poland, Croatia or Slovakia.

   - **UTF-8**. The UTF-8 format supports most of the special characters found in all languages. Select this encoding if you are contacting recipients in other parts of the world, for example, in Eastern Europe or Turkey.

3. Click **Apply** to complete the encoding configuration.

SMS

1. If multiple telephone numbers are configured as sender information in your client, in the **Edit content** window, select a number from the **Sender number** drop-down list. If just one sender number is configured, you need not select anything here.

2. In the **Limitation of SMS messages** drop-down list, select the maximum number of messages to be sent to ensure that the content is not longer than the selected limit. You receive a warning message if the content exceeds the limit. See also: SMS.

3. In the **Content** box, enter the message text.

4. To enter personalized text, click **Insert field function** 👤 and select the recipient list field or the required field function from the list.

> **Warning:** You can use personalizations to add the name of the recipient to the message (for example "Hello John Doe..."). When using personalized text, the maximum specified message count may be exceeded if the added text (for example, name of recipient) is too long. In this case, the message is sent in full, but charges may be incurred for more SMS messages per recipient than specified in the setting for the message limit.

5. Click **Save**.

Mobile Push

See also: [Mobile Push](#)

1. In the **Title** box, enter the title of the push message. To create a personalized title, click **Insert field functions** 👤 and select the required recipient list field or the required field function from the list.

   > **Note:** This title is displayed on Android devices only. iOS devices show the name of your app. Nevertheless, enter a title.

2. In the **Content** box, enter the message text. To enter personalized text, click **Insert field functions** 👤 and select the required recipient list field or the required field function from the list.

3. In the **Deep link** area, define what should happen after the message is opened, such as landing pages to be opened in your app. Combine several actions such as opening a page along with playing a specific sound stored in your app by clicking **+** to add information. To insert personalized deep links, click **Insert field functions** 👤 and select the required recipient list field or the required field function from the list.

   > **Note: Reserved deep links and prefixes**
   >
   > Do not use the following reserved deep links:
   >
   > - from
   > - dry_run
   > - restricted_package_name
   > - delivery_receipt_requested
   > - delay_while_idle
   > - content_available
   > - message_id
   > - notification_key
   > - registration_ids

> Also, do not use the following prefixes in deep links:
>
> - google
> - gcm

4. In the **Expiry date** area, define the validity of the message (for example, to promote time-limited special offers) .

   - **On**. Specify the last date to deliver the message to the recipient's device. After this date, the message is not delivered. For example, if you define 2019-03-12 but the recipient activates his/her end device on 2019-03-13, the message is not displayed on the recipient's device.
   - **Non-expiring**. Select this option to deliver this message for an unlimited period.

   > **Note:** On Android devices, the maximum validity period is four weeks.

5. In the **Preview** area, switch between **Android** and **iOS** and **Banner** and **Lockscreen** to display a preview of your message on the respective device.
6. Click **Save**.

Step 3. Adjusting layout settings and content

Depending on the selected message type, you can adjust the layout and add content elements.

Email

See Edit mailing content. If you are using the Template Kit, see Template Kit.

SMS

In SMS messages, you can only send text-only messages. Enter the text in the **Content** box.

Mobile Push

With Mobile Push, you can send text-only messages and trigger predefined actions. See Mobile Push.

Omnichannel campaigns

This section contains special notes for the Mobile Push and SMS channels.

- Mobile Push
- SMS

Mobile Push

A push message is delivered from a software application to a mobile device, and appears on the device without a specific request from the client. The publisher can send the message at any time. Recipients do not have to use their devices to receive them. With Episerver Campaign, you can make push messages part of your campaign.

- Automated delivery through Smart Campaigns and Marketing Automation.
- Customize push messages by setting time limits and fields for individual target links.
- Integrated push message preview function.
- Episerver Campaign integrations for Mobile Push are available for Android and iOS operating systems. See Mobile Push on Episerver World for more information.

SMS

Mobile marketing offers high potential for reaching new target groups. with Episerver SMS, you can prominently reach customers on their mobile devices.

In most countries where this is possible, Episerver SMS uses direct routes to network operators and offers exceptional quality, speed, and availability. Thus, Episerver SMS is suited to the delivery of transactional and commercial messages.

Send appointments, PINs, billing, delivery or order information directly to your customer's SMS inbox, for example, the latest personal and customized special offers. For interactive direct communication with customers, use it to receive incoming SMS. Episerver's portfolio includes generation of short codes and standard numbers for two-way, mobile customer communication.

A personalized message is possible at all times. For effective international SMS communication, Episerver supports relative character sets and data formats, which support country-specific characters.

> **Note:** The sending of SMS messages requires a special opt-in.

Text length and number of characters

SMS messages are pure text messages. The maximum number of characters per message depends on the coding and special characters. Modern mobile phones can receive SMS messages which are too long (concatenated SMS) with no problem, and display these as a single message.

GSM character set

The GSM 7-Bit default alphabet was developed for sending and receiving SMS via the cellular mobile network. This standard contains a simple character set for sending SMS messages of up to 160 characters. The following characters are available:

```
"#$%&'()*+,-./0123456789:;<=>?@ABCDEFGHIJKLMNOPQRSTUVWXYZabcdefghijklmnopqrstuvwxyz_
¡£¤¥§¿ÄÅÆÇÉÑÖØÜßàäåæèéìñòöøùü
```

...plus the following non-visible characters:

- space
- new-line
- carriage return

The GSM standard character set includes an extension. Each character in the extension requires **two characters**:

```
^[]{}\|€~
```

UCS2 character set

The sending of SMS via Episerver Campaign also supports the UCS2 character set. This set covers most modern languages, as defined in International Standard ISO/IEC 10646. See Universal Coded Character Set.

> **Note:** When UCS2 is used, an SMS message cannot exceed 70 characters because each character requires 16-bits; more than double the storage required by a character in the GSM 7-bit default alphabet.

Determining which character set is used

The characters in an SMS message determine if it is GSM-coded (7-bit) or UCS-coded (16-bit). Each SMS can have only one encoding, which is performed automatically. If an SMS uses one 16-bit encoded character, the entire message is 16-bit encoded, even if other characters can be encoded using 7-bit.

Country-specific features

The sending of SMS, subject to country-specific regulations, primarily includes these functions:

- Sender identifier
- Sending length (multi-part) SMS
- Supported character sets

Moreover, as the customer, you are likewise subject to restrictions which vary by country. For example, you must comply with country-specific regulations on consent to advertising, privacy and competition regulations.

> Note: Limitations
>
> - Episerver does not support the delivery of binary content, such as ringtones or images.
> - Episerver does not support certain mechanisms in language tables for Portuguese, Turkish, Bengali and Hindi, the locking-shift or single-shift tables in GSM standard.
> - Not every character is available in every country.
> - In some countries, the characters used are restricted by law or network operators. Moreover, especially among discount telephone operators, the characters in an SMS may not be delivered correctly. This can lead to display errors.

Multipart SMS (concatenated SMS)

You can send a message with more than 160 or 70 characters (depending on character set), but the text is sent as multiple, individual SMS messages. Modern devices may display these SMS messages as a single SMS. The previous procedure corresponds to the GSM protocol **Concatenated SMS**. For longer texts, several individual SMS messages are used and counted for billing purposes.

The maximum number of characters per SMS is reduced for concatenated SMS messages. Thus, only 153 or 67 characters (respectively) per SMS are available. The maximum lengths appear in the following table:

SMS encoding	max char-acters per 1 message	max characters per 2 messages	max characters per 3 messages	max characters per 4 messages	each addi-tional
GSM 7-bit (default alpha-bet)	160	306	459	612	each plus 153 char-acters
UCS2	70	134	201	268	each plus 67 char-acters

> **Note: Recommended maximum number of characters**
>
> Do not send more than 10 SMS messages 1,530 characters) for a **Concatenated SMS**. If you send more than 10 SMS, or 1,530 characters, a multiple part message may not be sent or received correctly.

> **Note: Field functions and placeholders in SMS**
>
> If you use field functions and placeholders in an SMS message, the text length of the SMS sent cannot be calculated in advance. If placeholder text is replaced by per-sonalized content (for example, the recipient name), SMS messages may become multi-part messages and incur higher costs. So, before sending, check how many char-acters are included in your datasets and how long an SMS can be. You can also read the example in the **Personalizations** section.

Checking costs

Billing is calculated per SMS sent. For example, for a two-part SMS mailing, two text messages (SMS) are billed per recipient.

For a cost overview, Episerver Campaign lets you enter the number of SMS messages – and thus the maximum number of characters – you want to send. If the text is too long for the selected setting (for example, 160 char-acters (1 part)), an error message is displayed.

Sender identification

SMS is implemented based on phone provider. In addition to telephone numbers, you can use up to 11 alpha-numeric character strings as sender identification. with Episerver SMS, you can use the following sender

identification formats:

- **Alphanumeric sender identification**. String of letter and number characters. The sender identification must begin with a letter. Avoid the use of umlauts and special characters. Alphanumeric sender identifications can only be used to send (not receive) SMS.
- **Exclusive short codes**. Short sequences of numbers, for example 23232, for direct two-way customer communication. See [German Federal Telecommunication Network Agency (Bundesnetzagentur)](German Federal Telecommunication Network Agency) for the short code format for Germany. You can use exclusive short codes only within the country where they were assigned. International routing is not possible.
- **Non-exclusive short code**. A short code is simultaneously used by multiple service providers. You may provide keywords for response capability. You receive only forwarded messages that contain the keyword you provided.
- **Long code**. A long code is a customary mobile number that you can route internationally. For example, +4915112345678. The advantages of a standard number are cost and international usability.

> **Note:** For more information about the effect of exclusive and non-exclusive short codes, see Incoming SMS and Outgoing SMS.

Personalizing messages

You can insert placeholders for recipient list fields (such as "Hello {first name}!") or field functions (for example, salutation logic) into SMS messages. Upon delivery, these are replaced by the corresponding name (such as *Hello Andrea!*) or salutation format (*Dear Mr. Miller*).

If you use placeholders or field functions, the display of used/remaining characters cannot provide precise results. This is because Episerver Campaign can only determine message length after the placeholder or field function is replaced by the individual value, which occurs directly after sending. So, a message intended to be sent as a single SMS might be divided into two messages, which results in higher delivery charges.

Example

The following message contains a placeholder for the recipient 's first name and has 163 characters:

```
Hello {firstname}! Have you checked out our current holiday deals
at www.example.com yet? They are only available today (before
midnight) in our online shop. Act fast!
```

When sending, the placeholder is replaced with the recipient's name, and could look like this:

1) *Hello Max! Take a look at our current holiday deals at www.example.com! Only available today (before midnight) in our online shop. Act fast!*

2) *Hello Maximilian! Take a look at our current holiday deals at www.example.com! Only available today (before midnight) in our online shop. Act fast!*

In the first example, the sent message has 145 characters and is sent as a single SMS. In the second example, the message has 162 characters and is divided into two SMS messages, so two SMS messages are billed.

Analyzing bounces

You can analyze bounces from SMS recipients. A bounce is generated when:

- the mobile phone is switched off or unreachable during dispatch
- the mobile phone's inbox is full
- the number is invalid or no longer in use

Blocking numbers with a blacklist

If you want to send SMS mailings via your client, the client's blacklist is adjusted accordingly. You can block complete numbers or specific parts of numbers (such as area codes). You should block satellite phone numbers, because the cost for such a message is substantially more expensive (more than 1 euro per SMS).

Marketing Automation

Develop multi-step campaigns with action- and event-based mailings; perfectly adapted to a highly diverse set of target groups using fully automated distribution cycles. You can create elaborate campaigns based on your customer database, then refine them once the campaign is up and running. You have access to the entire platform, so you can concentrate on the ad message design.

- Lifecycle marketing made easy via drag and drop.
- Sustainable, automated cultivation of customer relations.
- Effective dialog marketing through customized triggered emails.
- Higher revenues through automated cross and upselling campaigns.

Keeping customers in your sites

Using Episerver's Marketing Automation, it's easy to analyze potential customers, promotions, and your customer contact histories then incorporate that information into your campaigns. Optimize your customer dialog through a process that lets you improve and refine your marketing strategy. Information gathered during a campaign can be used to augment an existing database. This, in turn, lets you more accurately define segments then roll out more finely-tuned campaigns.

Examples of campaigns supported by Marketing Automation:

- **Welcome mailings**. Welcome new subscribers through targeted welcome mailings. These are based on a multi-stage campaign aimed to introduce potential purchasers to your brand and what it has to offer. First impressions are very important in campaigns of this kind. It's an ideal phase for introducing your line of products and opening a dialog. Ask new subscriber to complete their data and to enter their interests and preferences. In this way, you know early on whether an addressee would be interested in special promotional offers. And the Preference Center (profile self-administration) lets you inquire whether the subscriber prefers to be contacted on a weekly or monthly basis. Under certain circumstances, it may be worthwhile to include a sweepstakes mailing as part of the series of welcome mailings – to turn an interested consumer into a new customer.

- **Trigger and transactional mails**. Trigger mails help nurture existing customer relationships, ensure consistent sales, and initiate new customer relationships. Distribution is triggered by a special event relating to the subscriber – with Episerver Campaign automatically sending out trigger mails according to predefined criteria or at a specified point-in-time. In campaigns created with Marketing Automation, each node through which mailings are sent is a trigger mail. This provides a simple tool for automatically contacting customers individually under a variety of scenarios. Transactional mails, on the other hand, are emails sent out subsequent to an order, a purchase, or similar customer action (transactions). See also Triggers in the Triggers User Guide.

  If you use post-click tracking, you can use Episerver's Marketing Automation to send transactional mails. See also Post-click tracking.

- **Cross and upselling offers**. Product recommendations offer enormous potential. These mailings are prompted by a purchase, a registration or similar action, with contents automatically adapted accordingly. The goal is to encourage follow-up purchases, the purchase of higher-quality and higher-priced goods, or a wider variety of purchasing choices. Cross- and upselling recommendations are made available through a database and content interface or via established web-analysis software in Episerver Campaign.

- **Customer care**. Establish an ongoing dialog with regular customers through a proactive approach to customer care that goes beyond regular communications. You can measure customer satisfaction, for instance, by means of statistical analyses based on scorings. Ideally, this lets you predict the likelihood of cancellation on a case-by-case basis. Specially incentivised customer-binding mails are sent when certain tolerance limits are exceeded. Concurrently, you can also include targeted customer satisfaction surveys that solicit suggestions on how to improve your services.

  Also, be sure to closely track changes to customer status. If a customer has a change of address, for example, you can send a mailing with information and promotions tailored to the new location. If you know your customer's age, select mailings with content appropriate to his or her age-bracket. React to the first signs of inactivity by inquiring whether the customer elects to suspend mailings for a time or prefers receiving them less frequently. Contact Episerver with any requests.

- **Reactivation**. Reactivation by email is an important component of effective lifecycle marketing. Successful reactivation depends on the effective monitoring of subscribers. Early detection of sagging interest or excessive contact frequency helps to avoid customer inactivity and, ultimately, customer withdrawal.

  First, define at what point a customer is to be considered inactive. Set a timeframe to indicate when a customer fails to open or click your emails to determine his or her status. Possible indicators include not only failure to open or click mails but also a failure to log in to user accounts and communities, or user data not

being updated. The timeframe you employ depends on the natural lifespan of your products, services and promotions. Successful re-activations are normally the result of multi-stage campaigns. For example, you may want to request that the addressee update his or her customer information. Those who click the link receive a shopping coupon. And you can incentivise addressees who did not respond your first email by sending a second one.

> Tip: Marketing Automation guide
>
> See helpful information, tips, tricks, and examples for successful Marketing Automation campaigns in **Marketing Automation guide**.

Accessing the campaign overview

To manage Marketing Automation campaigns, open the start menu and select **Campaigns** > **Marketing Automation**. The **Marketing Automation** window contains an overview of Marketing Automation campaigns. From the overview, you can create new campaigns, edit, delete, start existing campaigns, or pause running campaigns.

Creating an automated campaign
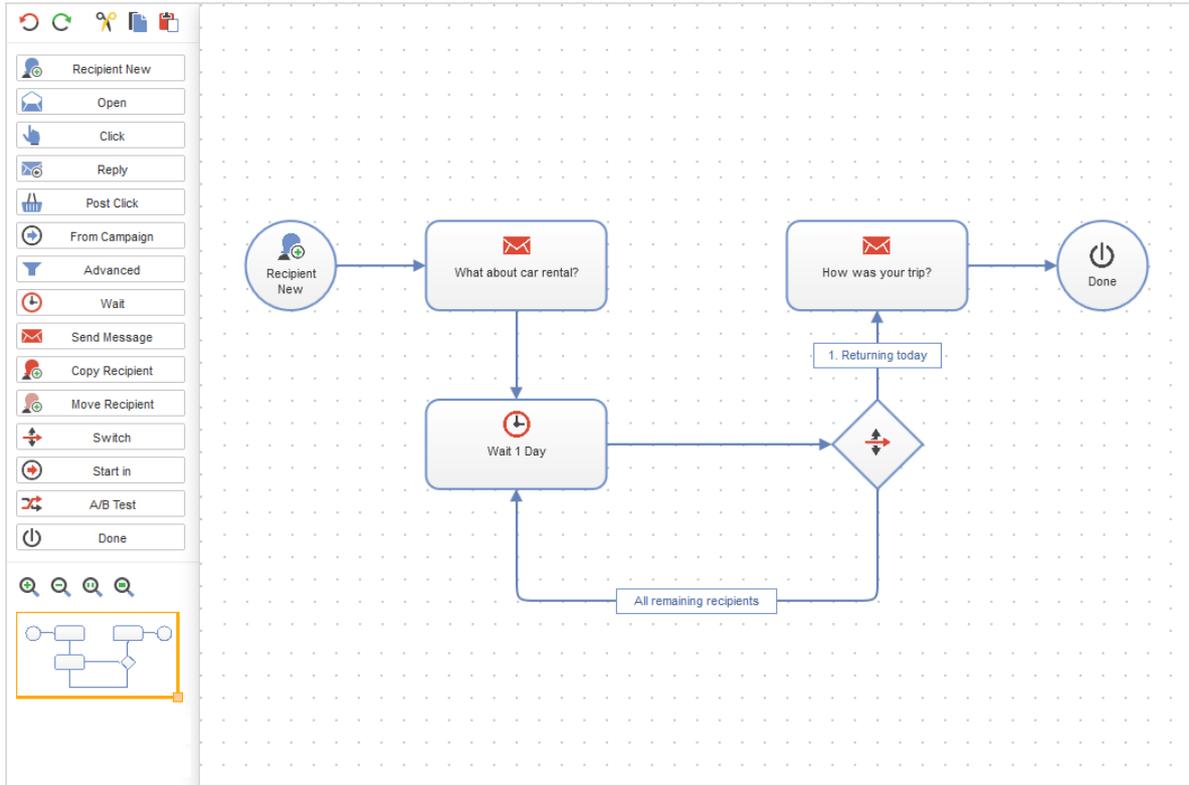
1. Click **Create** to create a new (or **Edit** to edit) Marketing Automation campaign.

   To create a new campaign, select **New** from the drop-down list.

   To use an existing campaign as a template, click **From existing**, choose your client and campaign, and click **Apply**.

   The **Create campaign** (or **Edit Episerver Campaign**) window opens.

2. Define the process of your campaign by dragging and dropping nodes from the action area to the working area, connecting them, and entering desired settings. See Edit nodes and Marketing Automation nodes.

3. Click **Save draft**, enter a name for the campaign and click **Save**. The new Marketing Automation campaign is displayed in the overview.

   > **Tip:** If you already saved a draft of a campaign and want to display the running or paused version of it, open the campaign report. See Marketing Automation campaign report.

> **Warning:** Marketing Automation does not guarantee that mailings are sent in real time. Note the following hints on sending Marketing Automation messages.
>
> - Use the **HTTP API** for time-sensitive mailings (for example, order confirmations or password reminders), because Marketing Automation mailings cannot always be processed in real time.
> - Target groups within the same campaign that check on the dispatch of the message in a node may give false results because the mailing may not be sent. If you use such target groups behind the **Send message** node, there may be undesirable effects, as the target groups may not work. To avoid this, place a **Wait** node, which delays the execution of the action, in front of such nodes.
> - If you place a **Send message** node behind a **Move recipient** node, you also should place a **Wait** node in front of the **Move recipient** node. Otherwise, the recipient may be removed from the recipient list before the message is sent.

Starting or pausing a campaign

To start a Marketing Automation campaign in the **Marketing Automation** window, select the campaign and click **Start**. Next, Episerver Campaign validates the campaign's content. If errors are found, correct them by editing the campaign.

To pause a campaign, in the **Marketing Automation** window, select the campaign and click **Pause**. To resume the campaign, click **Start**.

> **Note:** If your Marketing Automation campaign contains a **Wait** node and you pause the campaign, the time specified in the node is not paused. That is, if the waiting time of the node elapses during pausing, the next action is executed as soon as the campaign is restarted.

Deleting a draft

To delete a version of a running or paused Marketing Automation campaign, in the **Edit campaign** window, click **Delete draft**.

> **Warning:** Deleting a draft reverts the current changes and all changes made since the start of the campaign. To revert the current changes, close the **Edit campaign** window.

Deleting a campaign

To delete a Marketing Automation campaign in the **Marketing Automation** window, select the campaign and click **Delete**.

Marketing Automation nodes

The process of a campaign is defined by nodes that determine when a recipient passes through the campaign, and what actions are executed for the recipient. With the help of *connections*, you can link the nodes and specify the process of your campaign. The arrow at the end of each connection points to the succeeding node and the associated action.

Start nodes define events that initiate the process of a campaign for a recipient. The following start nodes are available:

- Recipient new
- Open
- Click
- Reply
- Post click
- From MA campaign
- Advanced

Action nodes specify which actions are executed during a campaign. The following action nodes are available:

- Wait
- Send message
- Switch
- A/B test
- Change recipient
- Copy recipient
- Move recipient
- Start in
- Limit
- Done

Start nodes

Recipient new

Starts the process of the campaign for a recipient added to the recipient list.

Parameters	Description and values

Starts the Marketing Automation campaign	Specify which recipients are passing through the campaign
	
	• **if recipient never passed through this MA campaign**: Recipients pass through the campaign if they
	
	  ◦ are newly added to the recipient list.
	  ◦ are not currently passing through the campaign.
	  ◦ never passed through the campaign.
	
	• **if recipient is not currently passing through this campaign**: Recipients pass through the campaign if they are
	
	  ◦ newly added to the recipient list.
	  ◦ not currently passing through the campaign.
	
	    Note: Recipients who already passed through a campaign but are newly added to the recipient list may pass through the campaign again.
	
	• **always**: Anyone newly added to the recipient list passes through the campaign.

Start only for recipients in (mandatory)	Only recipients of this recipient list(s) are passing through this campaign. **Note:** To start the campaign, you must specify a recipient list here.
Start only for	Only recipients of this target group are passing through this campaign.

> **Tip:** The **Recipient new** node is part of the former Marketing Automation packages **Starter**, **Advanced** and **Ultimate**.

Open

Starts the process of the campaign for a recipient who opened the message.

Parameters	Description and values

Starts the Marketing Automation campaign	Specify which recipients are passing through the campaign.
	
	 • **if recipient never passed through this MA campaign**: Recipients pass through the campaign if they
	
	     ◦ opened the message.
	     ◦ are not currently passing through the campaign.
	     ◦ never passed through the campaign.
	
	 • **if recipient is not currently passing through this MA campaign:**Recipients pass through the campaign if they
	
	     ◦ opened the message.
	     ◦ are not currently passing through the campaign.
	
	 > **Note:** Recipients who already passed through the campaign and who open the message again may pass through the campaign again.
	
	 • **always**: Any recipient who opens the message pass through the campaign.

Mailings	Specify the mailings in which recipients must click a link. You can
	
	 • specify a mailing, or
	 • limit the mailing selection to
	
	     ◦ a mailing type.
	     ◦ a folder that contains the mailings.
	     ◦ the mailing's send date.

Parameters	Description and values
Start only for	Only recipients of this target group are passing through this campaign.

> **Tip:** The **Open** node is part of the former Marketing Automation packages **Starter**, **Advanced** and **Ultimate**.

👆 Click

Starts the process of the campaign for a recipient who clicked a link in the message.

Parameters	Description and values

Starts the Marketing Automation campaign	Specify which recipients are passing through the campaign.
	
	• **if recipient never passed through this MA campaign**: Recipients pass through the campaign if they
	
	   ○ clicked a link in the message.
	   ○ are not currently passing through the campaign.
	   ○ never passed through the campaign.
	
	• **if recipient is not currently passing through this MA campaign**: Recipients pass through the campaign if they
	
	   ○ clicked a link in the message.
	   ○ are not currently passing through the campaign.
	
	> **Note:** Recipients who already passed through the campaign and who click a link in the message again may pass through the campaign again.
	
	• **always**: Any recipient who clicks a link in the message pass through the campaign.

Mailings	Specify the mailings in which recipients must click a link. You can • specify a mailing, or

Parameters	Description and values
	• limit the mailing selection to ○ a mailing type. ○ a folder that contains the mailings. ○ the mailing's send date.
Links	Specify the links the recipients must click to pass through the campaign.
Click profile	Specify the click profiles whose links the recipients must click to pass through the campaign.
Start only for	Only recipients of this target group are passing through this campaign.

> **Tip:** The **Click** node is part of the former Marketing Automation packages **Starter**, **Advanced** and **Ultimate**.

✉ Reply

Starts the process of the campaign for a recipient who replied to the message or to whom the message could not be delivered.

Parameters	Description and values
Starts the Marketing Automation campaign	Specify which recipients are passing through the campaign. • **if recipient never passed through this MA campaign**: Recipients pass through the campaign if they ○ replied to the message or created a bounce. ○ are not currently passing through the campaign. ○ never passed through the campaign. • **if recipient is not currently passing through this MA campaign**: Recipients pass through the campaign if they ○ replied to the message or created a bounce.

Parameters	Description and values
	○ are not currently passing through the campaign. **Note:** Recipients who already passed through the campaign and who reply to the message or create a bounce again may pass through the campaign again. ● **always**: Any recipient who replied to the message or created a bounce pass through the campaign.

Mailings	Specify the mailings in which recipients must click a link. You can
	
	● specify a mailing, or
	● limit the mailing selection to
	
	  ○ a mailing type.
	  ○ a folder that contains the mailings.
	  ○ the mailing's send date.

Type	Select one ore more response categories of the reply.
Start only for	Only recipients of this target group pass through this campaign.
Minimum interval	Select an interval that checks whether the recipient already passed this campaign (triggered by this start node). If the recipient has passed through the campaign since the last check, the recipient will not pass through the campaign until the next check.

> **Tip:** The **Reply** node is part of the former Marketing Automation packages **Starter**, **Advanced** and **Ultimate**.

🛒 Post click

Starts the process of the campaign for a recipient that created a post-click.

Parameters	Description and values
Starts the	Specify which recipients are passing through the campaign.

Parameters	Description and values
Marketing Automation campaign	**if recipient never passed through this MA campaign**: Recipients pass through the campaign if they - created a post-click. - are not currently passing through the campaign. - never passed through the campaign. **if recipient is not currently passing through this MA campaign**: Recipients pass through the campaign if they - created a post-click. - are not currently passing through the campaign. Recipients that already passed through the campaign and that create a post-click again may pass through the campaign again. **always**: Any recipient that created a post-click pass through the campaign.
Mailings	Specify the mailings in which recipients must click a link. You can - specify a mailing, or - limit the mailing selection to - a mailing type. - a folder that contains the mailings. - the mailing's send date.
Post click	Select the post-click service. This is either the proprietary Post-click tracking or the web analytics software you are using.
Start only for	Only recipients of this target group pass through this campaign.
Include imported post-clicks without recipient list	Select this check box if you want to evaluate imported post-clicks the recipients of which cannot be assigned to any recipient list in Episerver Campaign. This is, for example, the case when post-clicks are imported from external sources or the recipient is logged in the online shop at the time of the post-click, but has not registered for the newsletter. This setting does not apply to post-clicks that can be uniquely allocated to recipients in existing recipient lists.

Parameters	Description and values
	With such post-clicks, in which the email address is known, Episerver Campaign checks whether this corresponds to a recipient in the replacement recipient list. Select the replacement recipient list in the next step. If the email address is found in this recipient list, this recipient is considered in the further course of the Marketing Automation campaign and can receive messages (provided that the other conditions are met).
Select replacement recipient list	Select the recipient list here to which the recipients of the imported post-clicks are compared. Post-clicks that could not be assigned to a recipient from any existing recipient list at the time of their capture (see the previous parameter) are compared to this recipient list and are assigned with the matching email addresses. Imported post-clicks that cannot be assigned to any recipient of this list are discarded. Note: You should create a **Standard** recipient list that contains the registered recipients and select this recipient list here. As a result, there is a high possibility that a post-click can be assigned to a recipient.

Tip: The **Post click** node is part of the former Marketing Automation packages **Starter**, **Advanced** and **Ultimate**.

From MA campaign

Starts the process of this campaign for a recipient from another Marketing Automation campaign.

Parameters	Description and values

Starts the Marketing Automation campaign	Specify which recipients are passing through the campaign.
	
	• **if recipient never passed through this MA campaign**: Recipients pass through the campaign if they
	
	    ○ come from another campaign.
	    ○ are not currently passing through the campaign.
	    ○ never passed through the campaign.
	
	• **if recipient is not currently passing through this MA campaign**:

Parameters	Description and values

	Recipients pass through the campaign if they
	
	    ○ come from another campaign.
	    ○ are not currently passing through the campaign.
	
	    Note: Recipients that already passed through the campaign and that come from another campaign again may pass through the campaign again.
	
	  ● **always**: Any recipient that comes from another campaign pass through the campaign.

Start only for	Only recipients of this target group pass through this campaign.

> **Tip:** The **From MA campaign** node is part of the former Marketing Automation package **Ultimate**.

Advanced

Starts the process of the campaign for a recipient that matches specific criteria.

Parameters	Description and values

Starts the Marketing Automation campaign	Specify which recipients are passing through the campaign.
	
	● **if recipient never passed through this MA campaign**: Recipients pass through the campaign if they
	
	    ○ match the criteria of this node.
	    ○ are not currently passing through the campaign.
	    ○ never passed through the campaign.
	
	● **if recipient is not currently passing through this MA campaign**: Recipients pass through the campaign if they
	
	    ○ match the criteria of this node.

Parameters	Description and values
	○ are not currently passing through the campaign. > **Note:** Recipients that already passed through the campaign and that matches the criteria of this node again may pass through the campaign again. • **always**: Any recipient that matches the criteria of this node pass through the campaign.
Start only for recipients in (mandatory)	Only recipients of this recipient list(s) are passing through this campaign. > **Note:** To start the campaign you have to specify a recipient list here.
Interval	Specify how often the criteria should be checked. Episerver Campaign then checks at the specified time which recipients meet the criteria—these recipients then pass through the campaign.
Start only for (mandatory)	Only recipients of this target group pass through this campaign. > **Note:** To start the campaign you have to specify a target group here. > **Note:** The examination of the criteria may take time to complete, so the following actions may be delayed.

> **Tip:** The **Advanced** node is part of the former Marketing Automation packages **Starter**, **Advanced** and **Ultimate**.

Action nodes

🕐 **Wait**

During this time no action is taken.

Parameters	Description and values
Waiting time	Specify how long no action is taken. After this time, the following action is executed.
Wait only if target group is	For recipients of this target group, no action is taken during this time. Remaining recipients skip this action.

> **Tip:** The **Wait** node is part of the former Marketing Automation packages **Starter**, **Advanced** and **Ultimate**.

✉ **Send message**

Sends a message to the recipient.

> **Warning:** For performance reasons, messages are sent asynchronously to the course of the recipient in the campaign.
>
> Note the following hints on sending Marketing Automation messages.
>
> - Target groups within the same campaign, that check on the dispatch of the message in this node, may give false results because the mailing may not be sent. If you use such target groups behind the **Send message** node, there may be undesirable effects, as the target groups may not work. To avoid this, place a **Wait** node, which delays the execution of the action, in front of such nodes.
> - If you place a **Send message** node behind a **Move recipient** node, you also should place a **Wait** node in front of the **Move recipient** node. Otherwise, the recipient may be removed from recipient list before the message is sent.

Parameters	Description and values
Mailing	Select the message to be sent to the recipient. Messages that you link here need to be created beforehand. Two functions are available for this purpose:

Parameters	Description and values
	• If you are working with Mailings Classic: Open the [Start menu](#) and select **Campaigns** > **Mailings Classic** and create a mailing of the type **Special/API**. • If you are working with Smart Campaigns: Open the [Start menu](#) and select **Campaigns** > **Transactional emails**, and create a new message.
Send only to	A message is sent only to recipients of this target group. Remaining recipients skip this action.

> **Tip:** The **Send message** node is part of the former Marketing Automation packages **Starter**, **Advanced** and **Ultimate**.

⇕ Switch

Allows the branching of a campaign based on target groups. The branches are processed hierarchically. That is, the lowest numbered branch has the highest priority and is executed first.

Parameters	Description and values
Target group	Create a connection to the node whose action must be executed for a specific target group and specify this target group. You can connect nodes using different target groups. > **Note:** If a recipient matches a target group, the corresponding action is executed. Episerver Campaign does not check if the recipient matches another target group.
All remaining recipients	Create a connection to the node whose action will be executed for remaining recipients.

> **Tip:** The **Switch** node is part of the former Marketing Automation packages **Starter**, **Advanced** and **Ultimate**.

⤭ A/B test

Allows the branching of the campaign based on predefined probabilities.

Parameters	Description and values
Percentage	Create a connection to the node whose action has to be executed for the recipients, and specify the probability of recipients passing through this node. You can connect nodes using different probability values.
All remaining recipients	Create a connection to the node whose action has to be executed for the remaining recipients.

> **Tip:** The **A/B test** node is part of the former Marketing Automation packages **Advanced** and **Ultimate**.

🧑‍💼 Change recipient

Changes a recipient's data. To use this node, you need the [permissions](#) that let you evaluate action-based data at user level.

Parameters	Description and values
Recipient list	Select the recipient list where you want to change recipient data.

Changes	Specify the changes that have to be made.
	1. In the first list, select a recipient list field.
	2. In the second list, select the action to be performed.
	   • **set value to**: Replace current value with new value.
	   • **append suffix**: Append value to existing value.
	   • **prepend prefix**: Prepend value to existing value.
	   • **toggle**: Toggle between current and counter value.

Parameters	Description and values
	<blockquote>**Tip:** This option is only available for boolean fields. These fields contain two values: `true` and `false`. If, for example, the "male" field contains the value `true`, it is replaced with the value `false`.</blockquote> • **time of pass-through**: Replace the current value with the time of the pass-through. The value is set to the time when the recipient passes through this node. • **increment value by**: Increment the current value by a certain value. • **decrement value by**: Decrement the current value by a certain value. • **clear**: Delete the current value. 3. In the last text field, enter a value. To change multiple recipient list fields, click **+** and repeat the steps.
Perform action only for	Changes are made only for recipients of this target group. Remaining recipients skip this action.

> **Tip:** The **Change recipient** node is part of the former Marketing Automation packages **Advanced** and **Ultimate**.

Copy recipient

Copies the recipient into another recipient list. To use this node, you need the [permissions](#) that let you evaluate action-based data at user level.

Parameters	Description and values
Copy to (mandatory)	Select the recipient list to which to copy this recipient.
Overwrite existing recipient	Check the box to overwrite the recipient in the target recipient list (if the recipient is already contained in this recipient list).
Copy only	Only recipients of this target group are copied to the recipient list. Remaining recipients skip this action.

> **Tip:** The **Copy recipient** node is part of the former Marketing Automation packages **Advanced** and **Ultimate**.

Move recipient

Moves a recipient to another recipient list. To use this node, you need the [permissions](#) that let you evaluate action-based data at user level.

> **Note:** Moving a recipient to another recipient list deletes any double opt-in data for this recipient.

Parameters	Description and values
Move to (mandatory)	Select the recipient list to which to move the recipient.
Overwrite existing recipient	Check this box to overwrite the recipient in the target recipient list (if the recipient is already contained in this recipient list).
Move only	Only recipients of this target group are moved to the recipient list. Remaining recipients skip this action.

> **Tip:** The **Move recipient** node is part of the former Marketing Automation packages **Advanced** and **Ultimate**.

Start in

Starts the process of another campaign for a recipient. The recipient remains in the current campaign and passes though the other campaign in parallel. The other campaign must contain the **From campaign** start node.

Parameters	Description and values
Episerver Campaign (mandatory)	Select the campaign that the recipient has to pass through.

Parameters	Description and values
Beforehand copy to	Optionally select if the recipient must be copied to another recipient list before he passes through the campaign.
Overwrite existing recipient	Check this box to overwrite the recipient in the target recipient list (if the recipient is already contained in this recipient list).
Perform action only for	Only recipients of this target group are passing through the other campaign. Remaining recipients skip this action.

> **Tip:** The **Start in** node is part of the former Marketing Automation package **Ultimate**.

⏻ Done

Marks the end of the campaign. This is an optional node.

> **Tip:** The **Done** node is part of the former Marketing Automation packages **Starter**, **Advanced** and **Ultimate**.

Marketing Automation campaign report

To view the Marketing Automation campaign report, access the Marketing Automation window, click a running or paused campaign, and click **Report**.
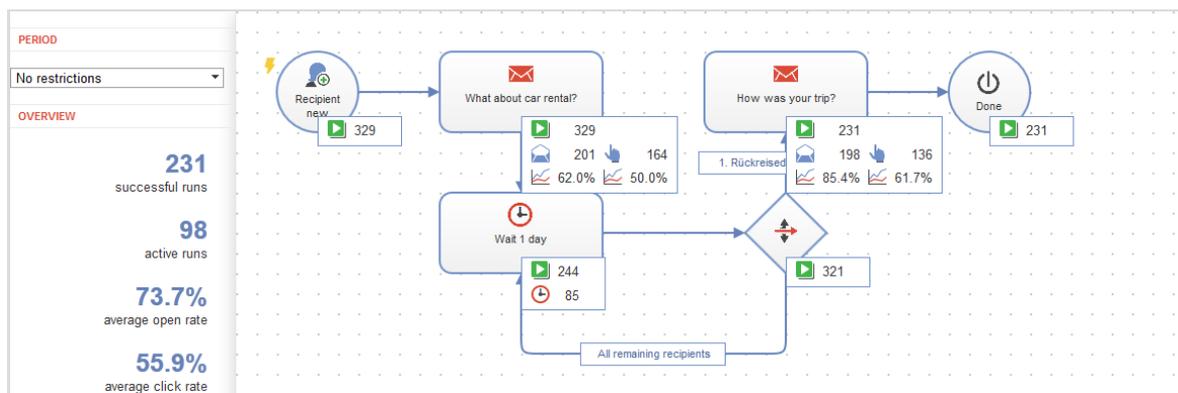
The Marketing Automation campaign report lets you evaluate the success of your campaign. To accomplish this, it shows the number of successful, current/active, and failed runs of the campaign. The report then breaks down this information for each campaign node.

Additionally, the openings, clicks, and the corresponding rates are displayed for the **Message** action node, and the currently-waiting recipients are displayed for the **Wait** action node.

> **Note:** If a recipient did not receive the message via a **Send Message** action node (for example, because he/she is blacklisted or created a bounce), this event appears as an error for the node.

Marketing Automation guide

Create more effective email marketing using a graphic interface with drag-and-drop functions to develop multi-step campaigns based on action- and event-based mailings. These campaigns are perfectly adapted to a highly diverse set of target groups, using automated distribution cycles.

Episerver Campaign's graphic editor lets you create elaborate campaigns for your customer database, then refine them after the campaign is running. This guide provides actual examples that you can use "as is" or with minor adjustments.
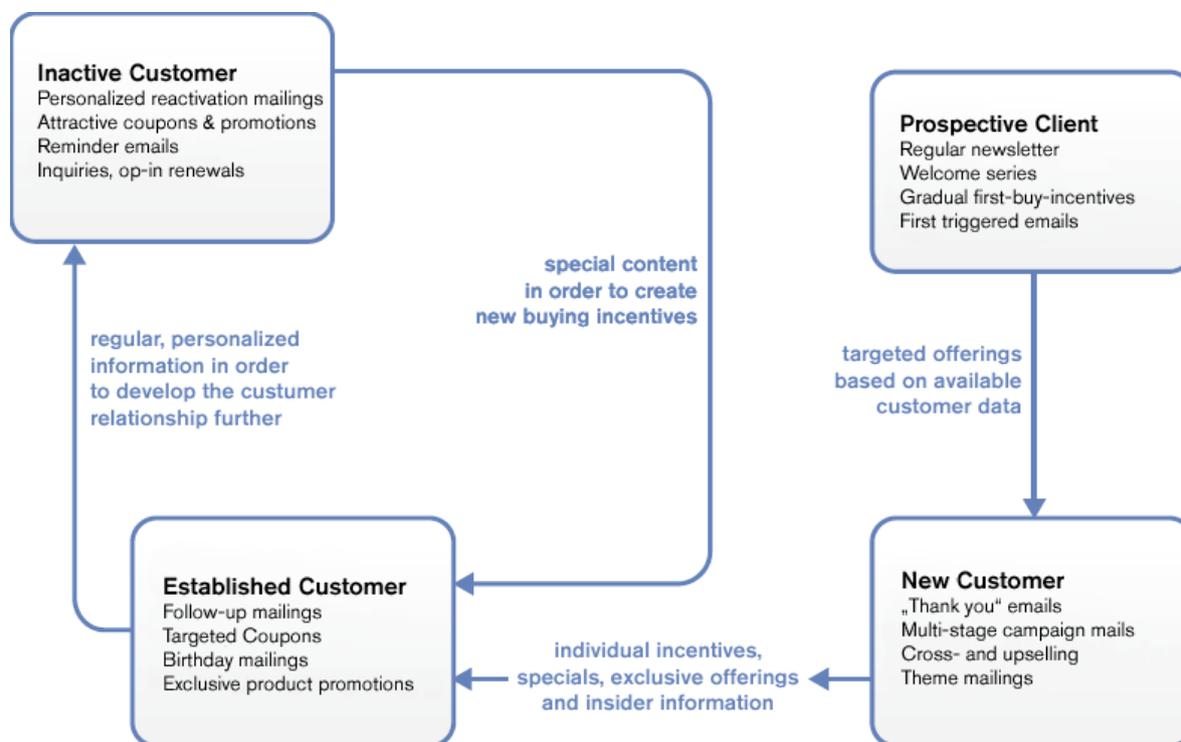
Benefits

- Lifecycle marketing made easy via drag and drop
- Sustainable, automated cultivation of customer relations
- Maximum flexibility of campaign design
- Increased revenue through automated cross-selling and upselling campaigns
- Optimal visibility and precise timing; supports several parallel campaigns
- Focused on individual recipients and simple content filtering options
- Practical real-time analyses by overlay

What is lifecycle marketing?

Email content should be oriented to a recipient's interests and personal circumstances. Lifecycle marketing shapes each customer relationship by communications that pass through a series of phases. Each phase is characterized by changing expectations that can be divided into segments, such as **new customer**, **regular customer**, and **inactive customer**.

You want to draw potential consumers to your company's brand and products, and transform general interest into a willingness to purchase, supported by appropriately targeted inducements. When a consumer becomes a customer or a long-term regular customer, you want to provide new impulses through well-defined and properly-dosed emails. By applying the right analysis strategy to an ever-expanding database, you can obtain a better picture of your customers and target measures such as periodic incentives or post-profiling. When you win back inactive customers, the lifecycle marketing strategy is complete.

Cultivating customer lifetime value

Lifecycle marketing tries to cultivate *customer lifetime value* (CLV) into a viable concept that benefits your company and its products. To do this, Episerver Campaign creates a series of automated mailings for events and target groups. CLV is the profit contribution that a customer realizes during his "lifetime" as a customer. In addition to past revenue, it considers anticipated future revenue and customer potential. CLV thus exceeds conventional campaign performance measurements. Moreover, this indicator includes customer sales trends, allowing for targeted email marketing aimed at generating appropriate purchasing inducements.
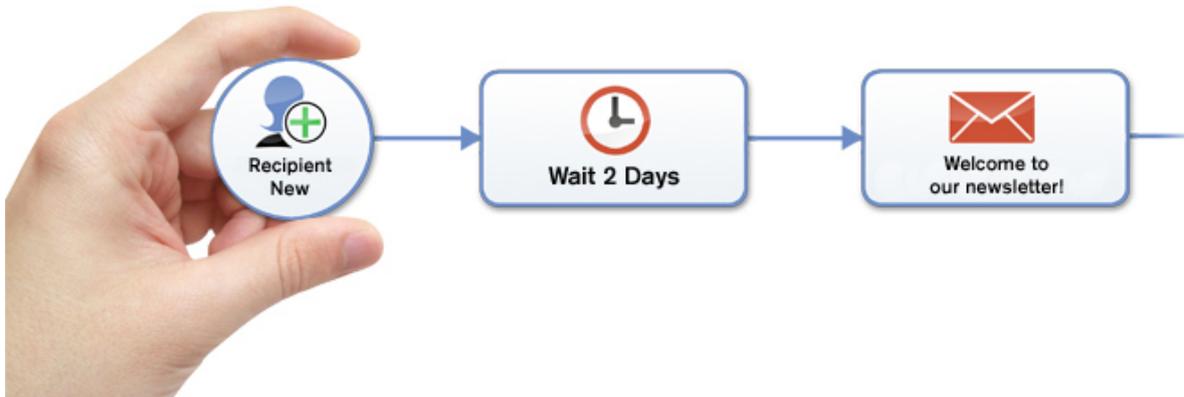
You want to find a profitable means of addressing a variety of customer scenarios over the long term. For example, an automated reactivation campaign is preferable to a one-time effort at winning back regular-but-currently inactive customers. Such a campaign systematically solicits this customer group over an extended time period. This approach also helps ensure that no customer "falls through the cracks," preserving customer value. Marketing managers can devote considerably more time to the content of their promotions and continued development of campaigns.

Marketing Automation for every need

Maintaining customer relationships is more complex than winning over new customers. Customer care in life-cycle marketing means consistently addressing the customer according to their status and interests. A contact strategy should be evolutionary, methodical, and forward-looking. Direct prompts and incentives toward obtaining desired responses and targeted feedback are initiated. Effective Marketing Automation improves customer care. Successful campaigns produce higher customer satisfaction and provide for targeted responses to the needs of regular customers.

While conventional approaches can support a few standard segments and customer lifetime phases, Episerver Campaign makes more effective use of your customer data to customize implementation. You can decide to display an entire customer lifetime cycle in a central campaign, or roll out several individual campaigns.

From concept to the campaign

A user-friendly interface lets you turn an idea into a campaign. Use your computer mouse to mark starting and ending points. Then, with the aid of nodes and branches, retrieve your parameters in Episerver Campaign and incorporate them into a campaign.
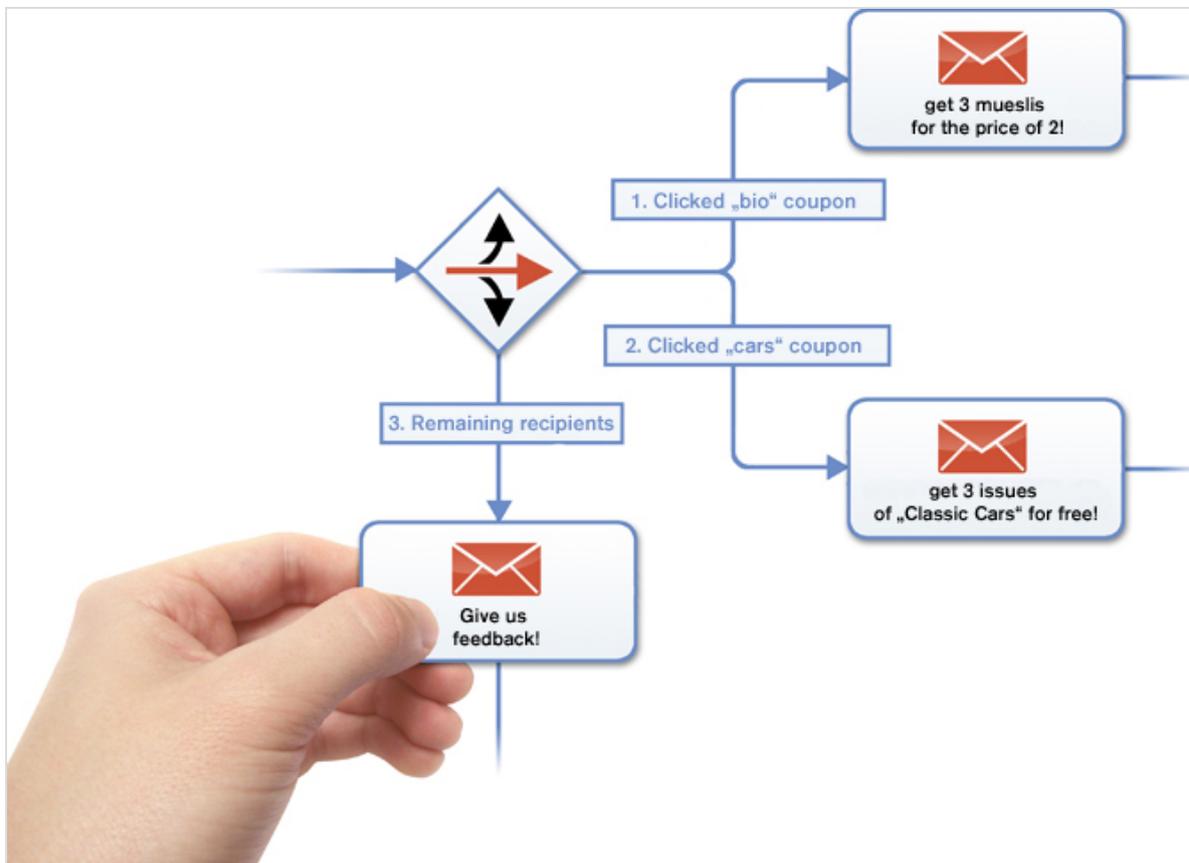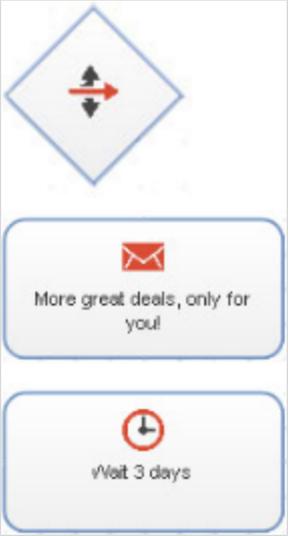
Each node stands for an action or event (such as sending birthday email as trigger-mail), or for filtering address-ees by target group. By linking two nodes, you create a sequencing plan that anyone can follow. You can assign parameters to any node, such as click profiles, target groups or individual mailings. The campaign editor checks link logic among nodes and verifies that no nodes lead to dead ends.

You can add partial or intermediate steps for specific addressee groups. For example, if you want to communicate with only addressees who opened their discount mailing three weeks earlier, select the appropriate target group as parameter. Other addressees in your distribution list are unaffected but may be considered for a different discount mailing. As you get to know you customers better through additional campaigns and analyses, you can create additional segments and reconfigure the way you communicate benefits.

Developing the perfect campaign takes time and analysis. You can modify and refine a campaign to properly align your marketing goals while moving toward perfection. You can save modifications as drafts then transfer them to a running campaign with no downtime.

Campaign building blocks

Blocks	Description
	Start node Defines the action or event that triggers by the campaign, such as a registration, a clicked link, or a post-click. Also defines recurring events, such as an addressee's birthday. Start nodes use blue icons.
	Prerequisites Set each campaign so it runs once or several times. You can also specify that an addressee cycles through a campaign only once at any given time.
	Action nodes A campaign may contain multiple action nodes. Each action node stands for one action. You can send out mailings, segment target groups, or set it to wait. If an action node is assigned to a target group, the action goes to addressees in that group only; other addressees skip this node and continue to the next node.

Blocks	Description
	Loop Campaigns may contain loops that an addressee cycles through several times until a criterion set for that loop either applies or no longer applies. The built-in campaign validation function evaluates whether an endless loop is inadvertently included in the campaign. If so, it prevents that campaign from being initiated.

Promoting on anniversaries

Anniversaries are opportunities to contact your customers and maybe include a coupon. You can use the dates of registering with your site, newsletter signup, or a birthday, provided in an optional form field.

For example, set up a target group formatted as **recipient list field: birthday: is anniversary**. You may want to include a personalized image and coupon in a birthday mailing. Create three mailings:

- one with an image for men
- one with an image for women
- one (labeled "fallback" in the image below) with a neutral image for recipients whose gender is unknown

The following steps set up this example.

1. Use the **Advanced** node as the starting node. This queries target groups at set intervals. With birthday mailings, a target group should be screened daily for **has birthday**.
2. Create a branch node to sort recipients by gender.
3. Each group receives the appropriate birthday mailing.
4. Recipients whose gender is unknown receive the third mailing.

> **Tip:** You may set up an anniversary campaign in the same manner. Change the target group to **has anniversary**.
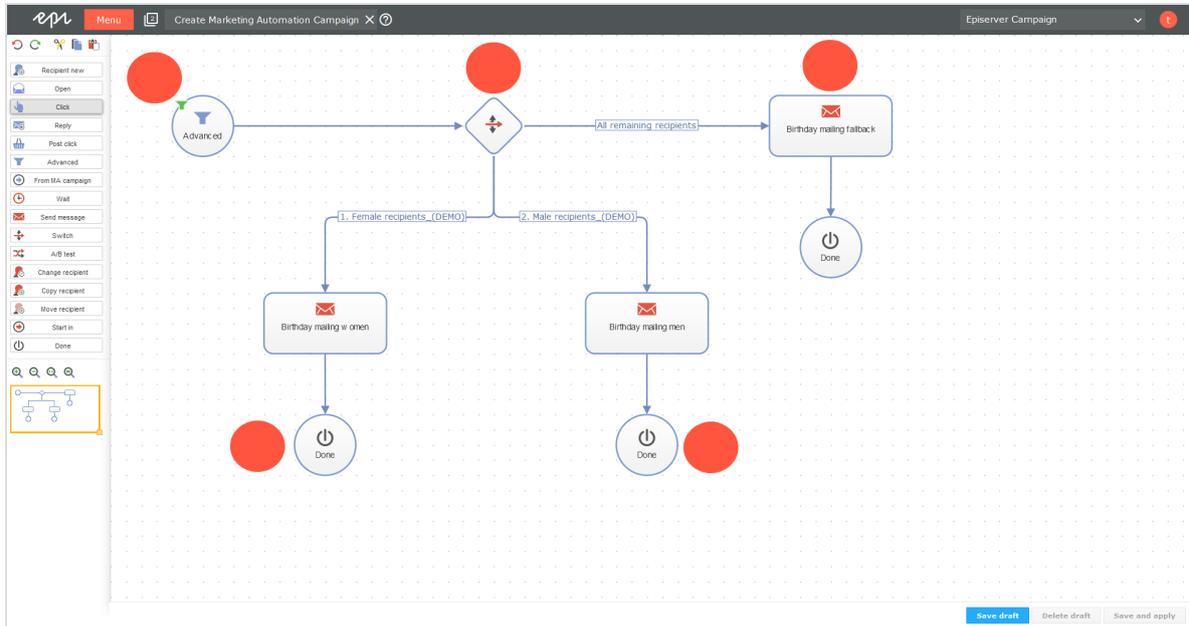
## *Promoting after-sales recommendations*

Prompt customers who made previous purchases to order more products through after-sales recommendations.

The following example uses customers of an online drugstore who purchased sunscreen the previous year. You want to contact customers whose last purchase is more than 10 months ago, remind them of the sunscreen's expiration date, and suggest they obtain a fresh supply.

For this campaign, first incorporate Post-click tracking in the drug store's online shop. This provides information about when a customer purchased a product in the category *sunscreen*. Next, set up a target group with the filter: **recipient purchased a product in the category sunscreen exactly 300 days ago**. This group generates a mailing that includes a notification about the expiration date, product recommendations, and a coupon for sunscreen. This mailing is called *Has your sunscreen expired? – Buy now and save!*

To set up this campaign, follow these steps.

1. Because this campaign responds with a time delay rather than a transaction, use an **Advanced** start node rather than a **Post-click** node. The parameter for the node is the previously-specified target group. The campaign is started daily.
2. Recipients filtered by this node receive the previously-created mailing.
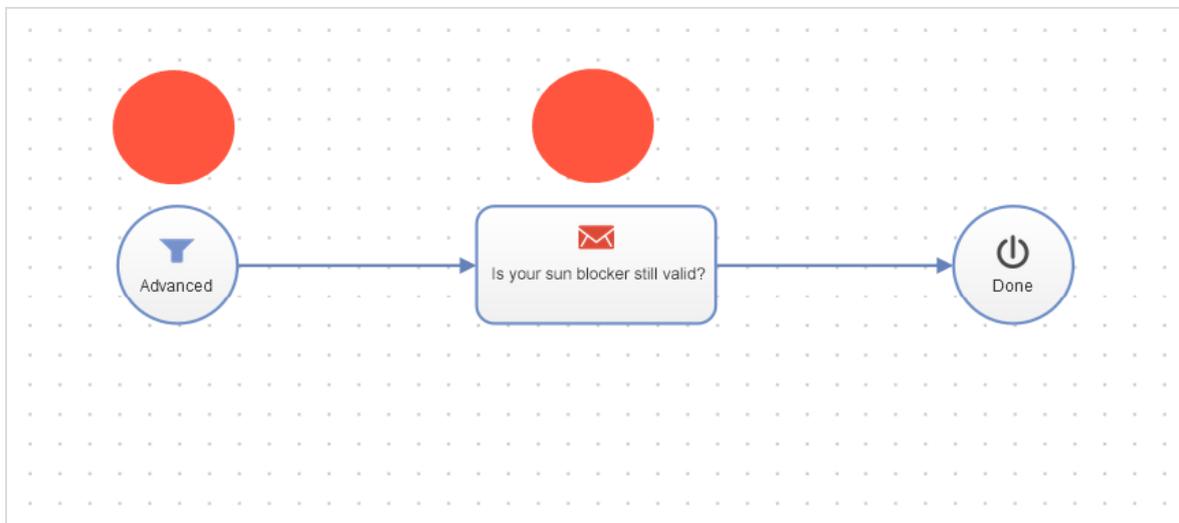
Reactivation campaigns

Along with taking care of active customers, you should also consider the potential of customers who recently ignored your promotions. Reactivating inactive customers offers multiple means for increasing revenue while maintaining and cultivating your customer master list.

A reactivation campaign should investigate reasons for inactivity, offer incentives to become an active customer again, and allow those interested to confirm their interest in your newsletter. A recipient who does not respond, that is, does not renew his opt-in, is preferable to a recipient who remains inactive. You may also want to offer inactive recipients an option to receive your newsletter less frequently (for example, monthly rather than weekly) or temporarily suspend receipt.

A reactivation campaign should consider these factors and provide flexible responses that correspond to customer reactions. The point at which a recipient is considered inactive varies depending on the product being advertised in the newsletter. For a travel agency, you can presume a 12-month purchasing cycle. That is, you expect a recipient to make large-scale travel plans once a year and seek suitable offers accordingly. For other business sectors, the cycle may be considerably shorter.

Based on this definition of an inactive recipient, you would create a target group with two qualifiers, one of which should apply in each case:

- Addressee has not clicked on any mailing in the past 730 days (2 years)

  OR

- Addressee has not opened a mailing in the past 365 days.

Planning a multi-stage campaign

When planning a multi-stage campaign, several mailings are necessary.

- *Haven't heard from you in a while.* Contains the latest travel offers.
- *How can we serve you better?.* Requests that the recipient update his or her user information.
- *Receive our newsletter once a month.* Lets recipients switch newsletter frequency to monthly rather than weekly. Another button is *Suspend newsletter for 6 months*.

   Both buttons are linked to a landing page that confirms the change. You can also configure a preference center with these features.

- *A coupon for you.* Recipients who clicked an item during the first reactivation campaign receive a coupon.
- *Thanks for your feedback!* Recipients who click the link to the preference center receive this mailing.
- *Please confirm your subscription.* Lastly, recipients who responded to none of the previous mailings should be prompted to renew their opt-in. The mailing should include an opt-in link.

> **Note:** Mailings used in conjunction with Marketing Automation must be set up as **Transactional mails** and be in **Send** status.

Setting a reactivation campaign

1. Start with an **Advanced** node.
   - This node type inquires once a week whether a recipient is in the **Inactive recipient** target group.
   - In the node, select the qualifier **Addressee has never cycled through the campaign**, because each recipient should cycle through the campaign only once.
2. The mailing *Haven't heard from you in a while* is sent out, then wait 7 days. The **Wait** node is assigned the target group **has not responded to 1st reactivation**, so recipients who click that mailing are directed to the next node.
3. Recipients who click an offer in the mailing *Haven't heard from you in a while* receive a coupon for other compatible offers. The reactivation campaign is over for these recipients.
4. Recipients who did not respond to the first reactivation campaign (neither opened nor clicked) receive the second reactivation campaign, *How can we serve you better?*, then wait another 7 days. The **Wait** node is assigned to the **has not responded to the 2nd reactivation** target group, so recipients who click the preference center link in this mailing are directed to the next node.
5. Addressees who clicked the link to the preference center in the second reactivation mailing also receive a coupon for offers suitable to their preferences.
6. The recipients' preferences are modified in accordance with their selection: For those recipients who clicked the link **Receive newsletter monthly**, the **frequency** recipient list field is set to **monthly**. A confirmation mail is sent regarding the mailing frequency change.

7. For recipients who clicked the **suspend delivery for 6 months** link, the **suspend** recipient list field is set to `true`. Insert a **Wait** node with a value of 6 months. Then, the **suspend** recipient list field is reset to `false`, and a *Welcome back* message is sent to the recipient.

8. Other recipients who have not responded to a reactivation mailing receive the *Please confirm your subscription* mailing. Insert a **Wait** node with a waiting period of 7 days. The **Wait** node is associated with a target group **has not responded to 3rd reactivation**, so recipients who confirm their opt-in are immediately directed to the next node.

9. Recipients who click the opt-in link also receive a *Thank you for your feedback* mailing, along with a coupon. Other recipients are marked as unsubscribed.
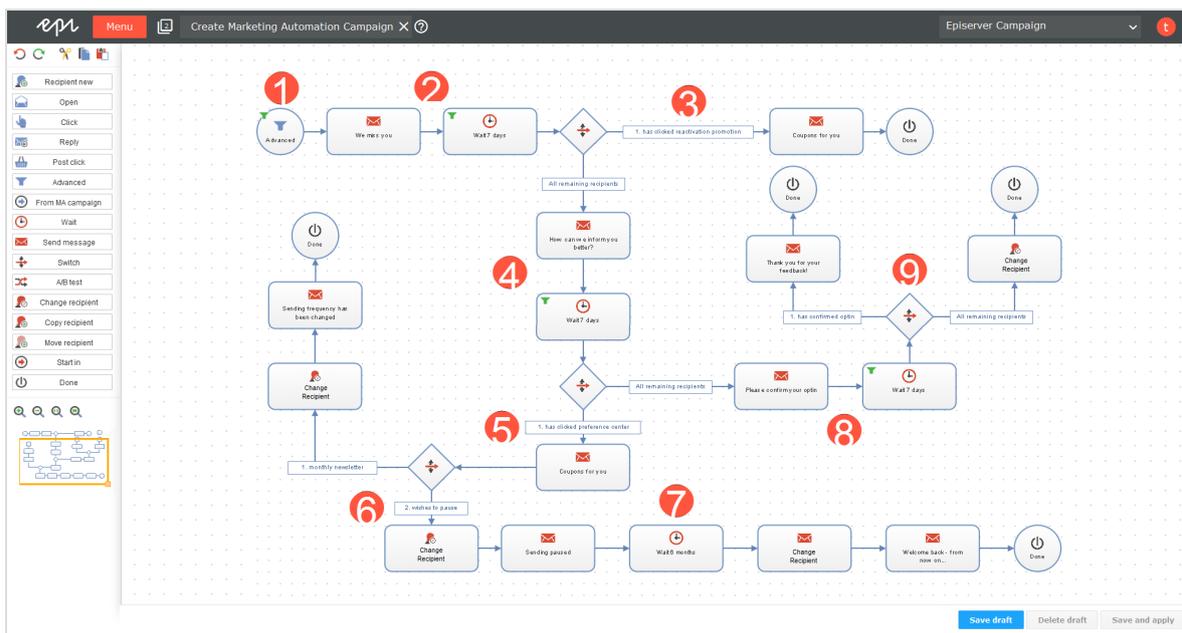
Creating a multi-stage series of welcome messages

A series of welcome emails can help develop customer value. Use multistage campaigns to acquaint new subscribers with your products and services. Recipients are particularly receptive to receiving a newsletter immediately after registration. This series of emails should comprise welcome messages followed by email with relevant content. Of most importance is a sustained, persuasive effort in the form of individual, premium offers.

The following example uses a travel service's online portal for which you want to establish trust by recipients and learn more about their specific interests. To this end, begin by creating suitable mailings, click profiles, target groups, and coupons for the campaign.

The initial mailing should be a welcome mail without promotional content that summarizes the portal's products and services. The mailing includes test/user ratings and short statements from other rating portals

that give the recipient a better understanding of what the portal offers. This mailing might be called *Welcome to Travel Deluxe*.

A second mailing, to be sent two days after the *Welcome to* mail, includes an incentive in the form of a coupon and additional information about travel preferences. So, you can offer several coupons, each tied to a different travel destination.

In addition, click profiles are created for secondary links that divide the offer into three categories: *Hiking & Nature*, *All inclusive* and *Culture*. This is placed under a mailing named *Our Gift to You*.

> **Note:** Mailings to be used with Marketing Automation must be set up as **Transactional mail** and be in **Send** status.

When these steps are taken, review how this campaign looks in association with Marketing Automation. The campaign should begin via the **Recipient new** start node for recipients newly added to the main recipient list (either through self-registration or import).

1. A multi-stage series of welcome mails begins via the start node **Recipient new**. This ensures that only recipients who are new newsletter subscribers and recently added to the recipient list are cycled through this campaign.

2. Drag the **Send message** action node into the workspace, select the type of mailing to be distributed in the node's **Properties** field, then link the start node to it.

3. After the recipient receives the first welcome email, he gets a short breather using the **Wait** action node. The duration is set in the properties window of the **Wait** node once it is linked to the previous node. In this example, the count is **3**, and the unit is **days**. So, the recipient waits 3 days before the next action is carried out.

4. Select the subsequent mailing using the **Send message** action node. This mailing contains the coupon offers including click profiles, as described above. This sends out individual, follow-on emails with reinforcing messaging. To do this, drag the action node into the workspace, select the mailing, and link the node.

5. To give the recipient sufficient time to read and click, drag the **Wait** node to the workspace and set up **3 days**.

6. This step is essential for distributing the follow-up mailings. The action node **Switch** lets the recipient receive different mailings based on target groups. In this case, four mailings will be employed following the branch. These mailings are placed behind the **Switch** node with the aid of the **Send message** node, as shown in the diagram. Next, individual branches are set and linked to the nodes. One target group is allocated to each branch.

   In this case, three branches are assigned to target groups, while one branch is defined for recipients who correspond to none of the target groups. If a target group does not match the **Send message** node with which it is associated, it skips over this node, and the mailing is not sent to the recipient.

7. As required, the recipient should receive a feedback mailing 28 days after registering. If you subtract the 2×3 days employed by the wait-nodes from this 28 day period, you should place a **Wait** node with a value of **22 days**.

8. After being on the recipient list for 28 days, by using an additional **Send message** node, the recipient receives this campaign's final mail.
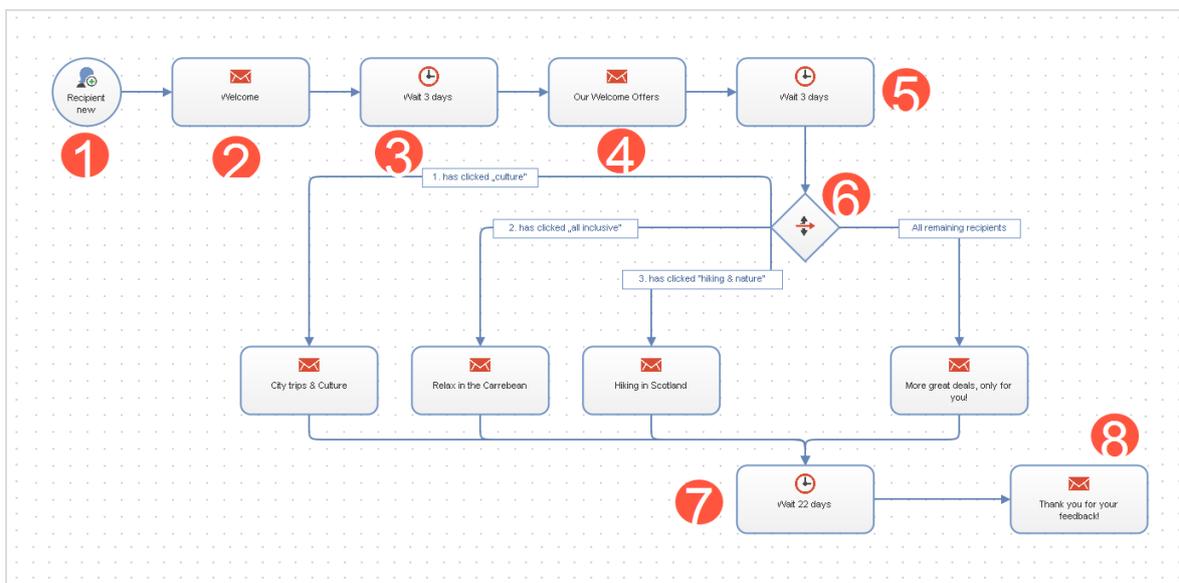
Cross- and upselling

Lifecycle marketing builds increased interest and purchasing incentives through campaign emails, trigger mails, and themed mailings. It provides added value by supplying the customer with relevant and helpful purchase or reservation information.

For example, while booking a flight, provide recommendations for hotel, car rental, area restaurants, and other activities. On returning from the trip, offer a photo album that can be purchased online to use for vacation snapshots.

To use cross- and upselling offers, set up post-click tracking in your online shop to provide the following data:

- Which product did the customer purchase?
- Was the purchase completed?
- Arrival and departure dates
- Optionally, the value of the order

> **Tip:** Contact customer support to set up post-click tracking.

Allocating target groups and mailings

To later select the correct mailing with corresponding hotel and rental agency recommendations, allocate a target group to each destination. The target group definition would be: *Addressee generated a post-click in the category flight with the value Mallorca / Grand Canary Islands / Sardinia / Athens / Antalya /* and so on.
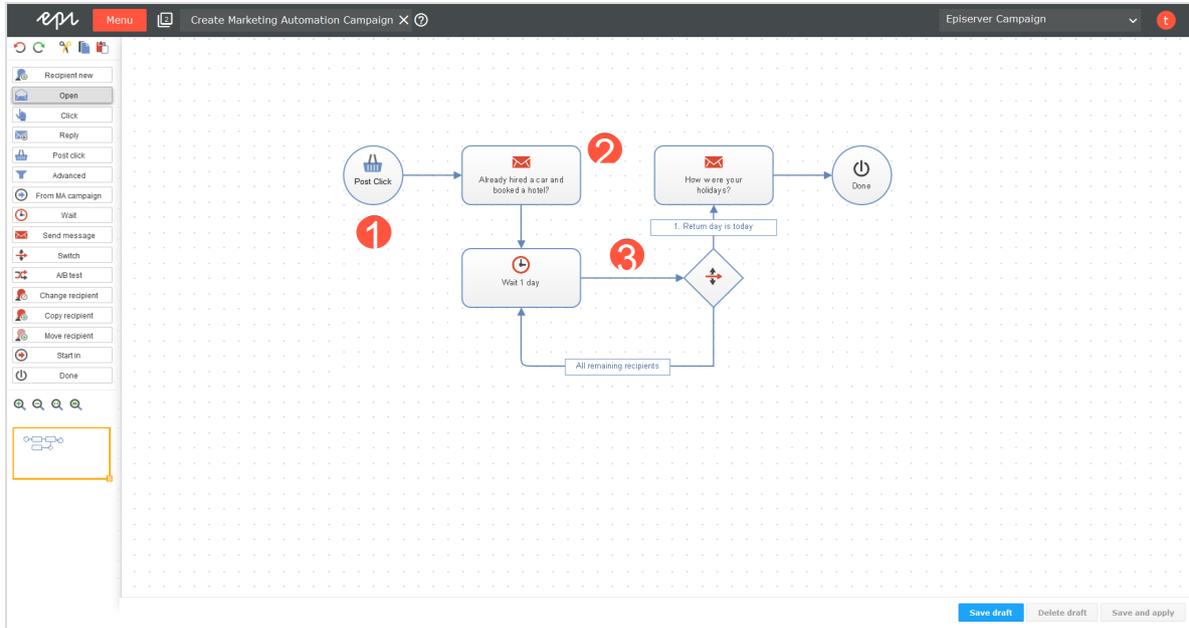
An additional target group checks if the date-of-return matches the current date.

Next, allocate a mailing to each travel destination (or create a mailing with a paragraph about each destination) and associate it with a target group. In the following example, a paragraph is included in the mailing for each target group set up during the previous step. To keep promotions up-to-date, this paragraph is linked to a **content interface**. You also need a mailing to distribute when a customer returns home, which looks the same to all recipients:

- *Before you fly: Our hotel recommendations*
- *Welcome back! Here's a place to put your vacation pictures*

> Note: Target groups compiled with the help of post-click data look different depending upon the configuration of the **post-click tracking** or the **web-analysis software**. For instance, with some web-analysis products, you can select the **product purchases** category then specify greater detail. The example here is based on a post-click configuration tracking where a post-click is produced only after an order is completed, eliminating the need for that pre-selection.

The following image shows how to create the *Before you fly: Our hotel recommendations* mailing.

1. Use the **Post-click** node and set the parameter *category same as flight*.

2. The selection of destination, and corresponding hotel accommodations, in the mailing occurs by target group. So, choose this mailing and send it to the recipients.

   To expand this campaign to include other promotions, such as for rental cars, modify the mailing and the paragraphs within it.

3. Incorporate a loop that inquires daily whether the return date equals that day's date. A **Wait** node is set with a value of *1 day* and, after it, a branch that filters the target group *return date is today.* This group receives the mailing, *Welcome Back: Now here's a place to put your pictures* with a coupon to order the photo album. Other recipients are reset to the **Wait** node.

Dealing with canceled transactions

Customers abort orders, purchases, and other transactions for many reasons. If a customer places a product in a shopping cart, that usually indicates interest in that product. A targeted campaign can give the customer an incentive to complete the transaction.

In the example below, customers who abort transactions are sent a coupon and recommendations for related items. Web analysis filters out recipients who put a trip/tour in a shopping cart but did not complete the transaction. You can use a web-analysis tool to transfer records of sales/reservation cancellations directly to Episerver Campaign.

> **Tip:** Web-analysis tools let you simultaneously generate suitable recommendations for transaction cancellations, transfer those to Episerver Campaign, then create a

> campaign aimed at this grouping. Contact [customer support](#) about connecting web-analysis software to your client.

Using categories and target groups, create paragraphs in a mailing that describe trips/tours similar to the canceled one. Send this mailing to those who canceled transactions.

```
Recipient generated a post-click in service "Analytics" with a value of "Mallorca" /
"Grand Canary Islands" / "Sardinia" / "Athens" / "Antalya" / in the category
"Transaction cancellation".
```

You must assign a target group to each destination.

The campaign is carried out in two steps, requiring two mailings: a coupon mailing, and a mailing containing recommendations:

- *May we recommend*
- *Book now and redeem your coupon*

A separate paragraph is inserted into the mailing for each target group created in the previous step.

The target groups for this campaign are the same used for the [cross- and upselling campaign](#), except that the **transaction cancellations** category is tracked. Using web-analysis software, the target group looks something like this:

1. Addressee generated a post-click
2. In the service **Analytics**
3. In the **transaction cancellation** category
4. Using the word

- Mallorca
- Gran Canary Islands
- Sardinia
- Athens
- Antalya
- ...

The following steps show how to create a campaign for transaction cancellations.

1. Use a **Post click** node. The **Analytics** service and the **transaction cancellations** target group are set as parameters for the node.
2. Filter recipients by this node to get recommendations relating to the trip/tour previously considered. Target groupings determine the recommendations in the mailing.
3. Set a **Wait** node to a value of **3 days**.

4. Set a branch. For each target group, recipients who purchased a trip/tour are filtered out using the **has purchased** target group created previously. For these recipients, the campaign is concluded.

5. Recipients who did not make a purchase get a coupon mailing.
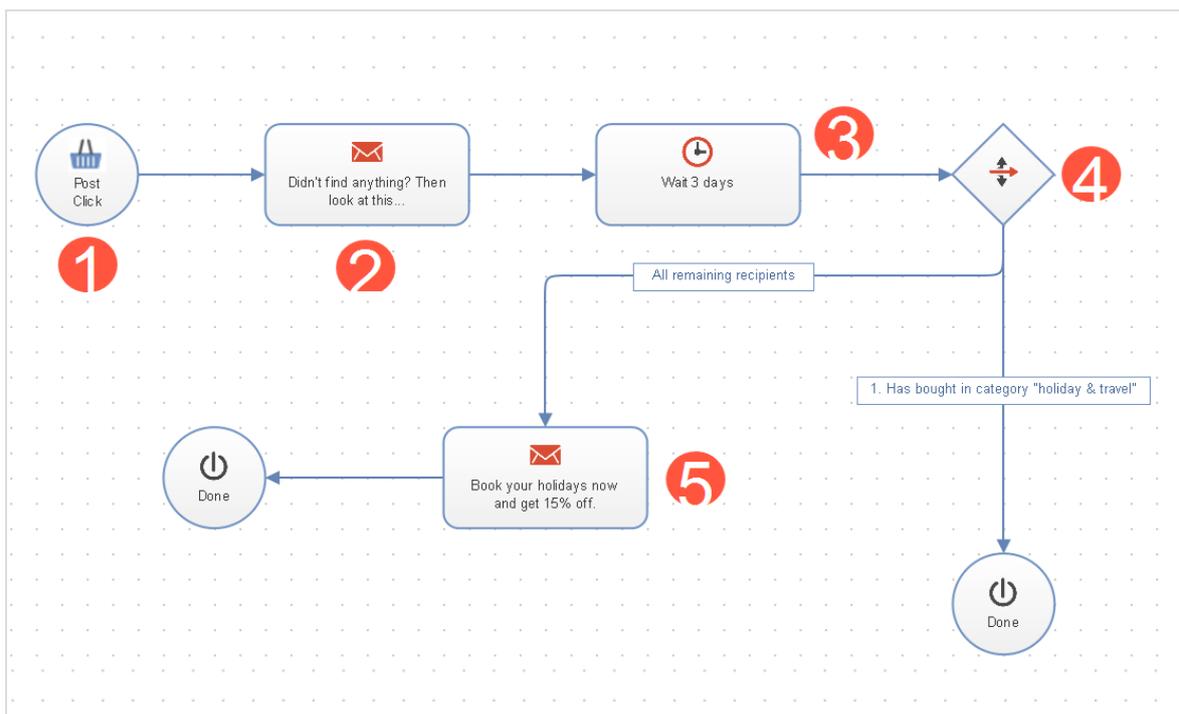
Creating a multi-stage campaign for more conversions

This type of campaign introduces regular recipients to products and services. It requires little effort to execute because the mailing content remains essentially the same. By modifying the subject lines and the order of paragraphs in a mailing, you can highlight a product's benefits and characteristics.

Use post-click tracking to conduct a multistage campaign, which uses target groups to filter recipients who generated a conversion.

> **Note:** Alternatively, you can configure target groups that filter recipients who clicked the registration link for your online shop in an email. This type of target group produces less precise results because it includes recipients who clicked a link but did not complete the registration or purchasing process.

Prerequisites

Mailings required for the campaign

- Principal mailing (type: regular) with two split mailings, each with a modified subject line (re: A and B).
- 2 copies of the principal mailing (type: special), each with a different subject line (attract interest, call-to-action) (re: C and D).
- Alternate version of the principal mailing (type: special) with the content rearranged or modified to shift the mailing's focus (re: E).
- Copy of this variant (type: special) with a different subject line urging call-to-action (re: F).

Target groups required for the campaign

- Recipients who received the principal mailing or one of the split mailings.
- Recipients who did not open the principal mailing.
- Recipients who did not open the second mailing.
- Recipients who did not open the third mailing.
- Target group that analyzes post-clicks and matches recipients who generated a conversion (for example, completed registration or purchase).
- Recipients who opened a mailing but did not generate a conversion.

Creating a subject line split mailing

The first stage of the campaign consists of a classic A/B split test, used to determine the subject line that generates the greatest number of openings or clicks. The mailing that performs best is then sent to the remaining recipients. The automated campaign begins 24 hours later, when recipients are sent additional mailings in several stages.

1. Create a principal mailing with desired content.
2. Prepare a split mailing from the principal mailing, with subject line version A.
3. Prepare a second split mailing from the principal mailing, with subject line version B.
4. Go to **Automatic selection of best split for principal mailing** and select **best unique opening rate** or **best unique click rate**, and set a 1-day delay for automated distribution of the principal mailings.
5. Save the settings.
6. Launch the split mailings, either manually or automatically.

> **Note:** The following campaign must be created **before** the split mailing is launched, and mailings in this campaign must be set as **Transactional mail**.

Following up with automated distribution mailings

Create a campaign that launches after the principal mailing is sent out.

1. Start with an **Advanced** node to filter recipients who received the principal mailing or one of the two split mailings. Initially, the standby time is set to four days to provide recipients sufficient time to respond.

2. Recipients who have not opened this mailing and have not completed registration receive the modified subject line C. They are given another 4 days to respond.

3. Recipients who open the first mailing during this period, but have not generated a conversion, do not receive mailing C. Instead, they are sent the two-stage reminder that concludes the campaign. The campaign terminates for recipients who generate a conversion.

4. Recipients who have not opened mailing C are sent another mailing with subject line D.

5. As in step 3, recipients who opened mailing C during this period, but who have not generated a conversion, are sent the two reminder mailings. The campaign terminates for recipients who generated a conversion.

6. After another 4 days, recipients who completed registration are filtered. For them, the campaign terminates. Recipients who opened mailing D but did not generate a conversion receive the first reminder mailing. This mailing, with subject line E, contains content from the principal mailings in a different order or with a different focus. Recipients who have not yet opened any mailings are disregarded from this point on.

7. After a week, recipients who did not open the first reminder receive a second reminder. This mailing is identical to the first, but contains another version of the subject line with a call-to-action. The campaign then terminates.
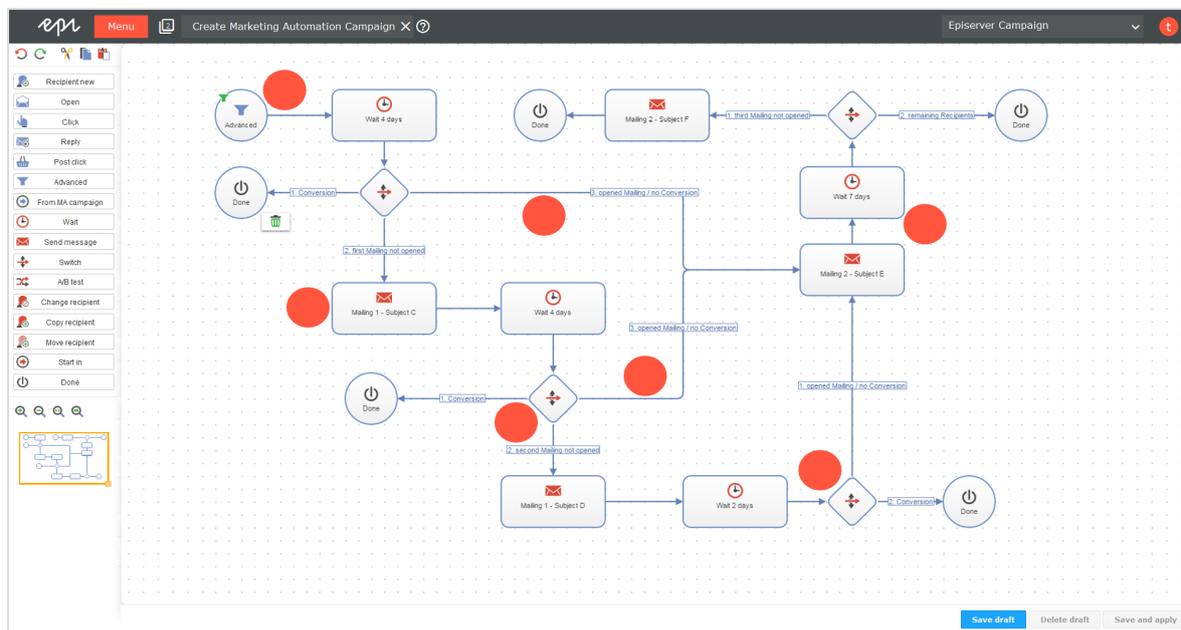
Transactional mails

Transactional mails are sent automatically as a result of actions or events. There are two scenarios for transactional mails.

- **API mails**. Result from an API call, such as placing an order from the online shop. For this type of transactional mail, you need the **REST API**, **SOAP API** or **HTTP API**.
- **Episerver Campaign mails**. Used in a **Marketing Automation campaign**. While editing the **Send message** node, select the appropriate transactional mail in the Marketing Automation function.

When started, transactional mails remain in **Sending** status. Transactional mails are sent in real-time via the high-performance Episerver Campaign transaction API.

To open the overview, go to start menu > **Campaigns** > **Transactional mails**. The mails appear in the top half of the window.

Selecting a media type

You can select the following media types for transactional mails, each of which are sent via different channels. The delivery channel must be compatible with recipient list type.

Delivery channel	Delivers	Required recipient list type
Mail	email	**Mail** or multiple list
SMS	SMS	**SMS** or multiple list

Viewing status

The Transactional mail overview displays the status of each transactional mail.

- **New**. Fully configured but not started.
- **Incomplete**. Elements are missing or necessary parameters are not defined. Complete the configuration then start the transactional mail.
- **Sending**. Active and sending mails.
- **Canceled**. Sending was canceled and cannot be restarted.

Transactional mail actions

Use the following buttons to perform the actions for transactional mails.

> **Note:** Some actions are not available for new or incomplete transactional mails.

- **Create**. Create a new transactional mail. See Creating and editing campaigns.
- **Copy**. Select a transactional mail and click **Copy**. Elements (recipients, target groups, messages, and so on) are applied.
- **Edit**. Select a transactional mail and click **Edit**. See Creating and editing campaigns.
- **Delete**. Select a transactional mail and click **Delete**. You can delete only new or incomplete transactional mails.
- **Start**. Select a transactional mail and click **Start**. Confirm the start by clicking **Start mailing**.
- **Copy to client**. If this feature is enabled, you can copy transactional mails to other clients. Recipient lists and target groups are not transferred to the target client.

  > **Note: Prerequisites**
  >
  > - The registered user has permission to create mailings in the target client.
  > - The target clients have the same template used in the transactional mail that you want to copy.

  1. To copy a transactional mail to other clients, in the campaign overview, select the transactional mail you want to copy. The **Copy to client** button is activated.
  2. Click **Copy to client**. The **Copy campaign to client** window opens.
  3. In the **Campaign** area, in the **New campaign name in the target client** field, enter the name for the copy of the transactional mail in the target client.
  4. In the **Target clients** area, check the box next to the client to which you want to copy the transactional mail.

     > **Tip:** To select all available target clients, check the box in the menu bar.

  5. Click **Copy**. When the copy process completes, **Copy process completed** is displayed.
  6. Click **Close**.
- **Analysis**. Select an active transactional mail (in **Sending** status) and click **Analysis** to check how many mails were already sent via an ongoing transactional mail. You can also see additional parameters such as opens, clicks, bounces, or unsubscribers.

Confirmations

Registration confirmations (opt-in emails) are sent in real-time via the high-performanceEpiserver Campaign transaction API (application programming interface) when a recipient registers for your newsletter. Once started, registration confirmations remain in **Sending** status.

To open the overview, go to start menu > **Campaigns** > **Confirmations**. Registration confirmations appear in the top half of the window.

Selecting a media type

You can select the following media types for registration confirmations, each of which are sent via different channels. The recipient list for a confirmation must be compatible with the delivery channel.

Delivery chan-nel	Sends registration confirmation via	Required recipient list type
Mail	email	**Mail** or multiple list
SMS	SMS	**SMS** or multiple list

Viewing status

The overview displays a status for each registration confirmation.

- **Sending**. Confirmation is active and sending opt-in emails to newly registered recipients.
- **Canceled**. Confirmation is canceled and cannot be restarted.

> **Note:** To resume the sending process, contact customer support.

Registration confirmation actions

You can perform the following actions for registration confirmations.

- **Edit**. To modify a registration confirmation, select it and click **Edit**. See also: **Creating and editing campaigns**.
- **Cancel**. To cancel the sending of an active registration confirmation (in Sending status), select it and click **Cancel**.

> **Note:** You cannot restart canceled registration confirmations. To resume the sending process, contact **customer support**.

- **Analyze**. Select an active registration confirmation and click **Analysis** to check how many opt-in mails were sent via a registration confirmation. You can also see additional parameters such as openings, clicks, bounces or unsubscribers.

Message templates

Use message templates to create messages quickly and easily for sending via **Smart Campaigns** and skip the configuration steps.

You can create message templates and **configure** these by yourself with sender information, recipient lists, and other parameters. You can create a message template by using a content template, directly via HTML code or by using an existing message as basis.

To open the template overview, go to start menu > **Campaigns** > **Message templates**.

Template actions

New

1. To create a new message template, click **New**.
2. From the drop-down list, select an option.
   - **New**. Create a new message template based on a free-text template or another content template. Click **New** in the left column, then select a content template from the list on the right.

     > **Note:** The selected content template must support the targeted dispatch channel, for example email.

   - **Message**. Apply content from an existing message to this message template. Click **Message** in the left column then select a message from the list on the right.

> **Tip:** Messages you created with [Mailings Classic](#) are also available.

- **Message template**. Apply the content and configuration of an existing message template. Click **Message template** in the left column, then select the template from the right.

3. Click **Next** to edit the message template.

Copy

1. To create a new message template and apply the content and configuration from an existing message template, click a message template in the list that has parameters that you want to apply.
2. Click **Copy**.
3. The message content appears on the screen. Modify as needed the click **Save**.

Edit

To edit an existing message template, click a message template in the list, then **Edit**.

> **Note:** If you save the message template under a different name after editing, the message template is renamed when you save it. No automatic copy is created.

Delete

To delete a message template, click a message template in the list, then **Delete**.

Configuring message templates

A message template usually contains sender information, a personalized subject line and other parameters such as character sets that can be reused. For information how to configure messages, see [Configuring the message](#).

For information how to add content to the message template that you want to reuse in messages (for example, header and disclaimer), see:

- **Email message templates**. See [Edit mailing content](#). If you are using the Template Kit, see [Template Kit](#).

Sending a split mailing

With split dispatch, you can test a mailing in different variants on a small portion of the recipient list before you start the actual dispatch. The variant that performs best in the criteria you defined is then sent to the remaining recipients.

Split mailings usually differ only in few parameters from another. The most common variations include:

- **Subject line**. Test how different subject lines affect the opening rate.
- **Header image, title, intro paragraph**. Test various headers, titles and introductory paragraphs.
- **Target group-specific testing**. Test a mailing or a mailing variant to different target groups (for example, male and female recipients).
- **Time of dispatch**. Test the optimal time to send the master mailing.

Split dispatch in Smart Campaigns

To start a split dispatch in Smart Campaigns, follow these steps:

1. Drag an A/B test node from the left action area and drop it onto the desktop.
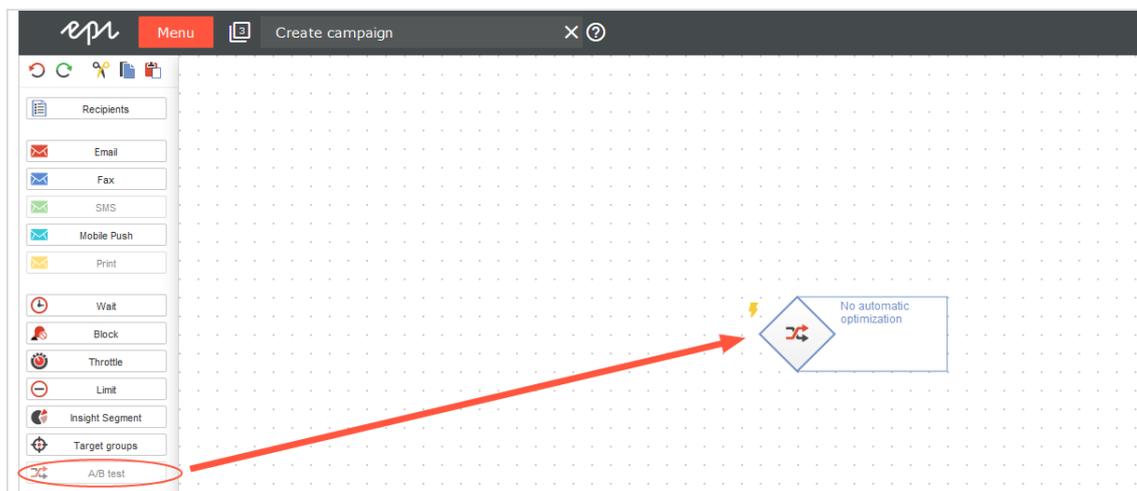
2. Add a **Recipients** node and select one or more recipient lists.
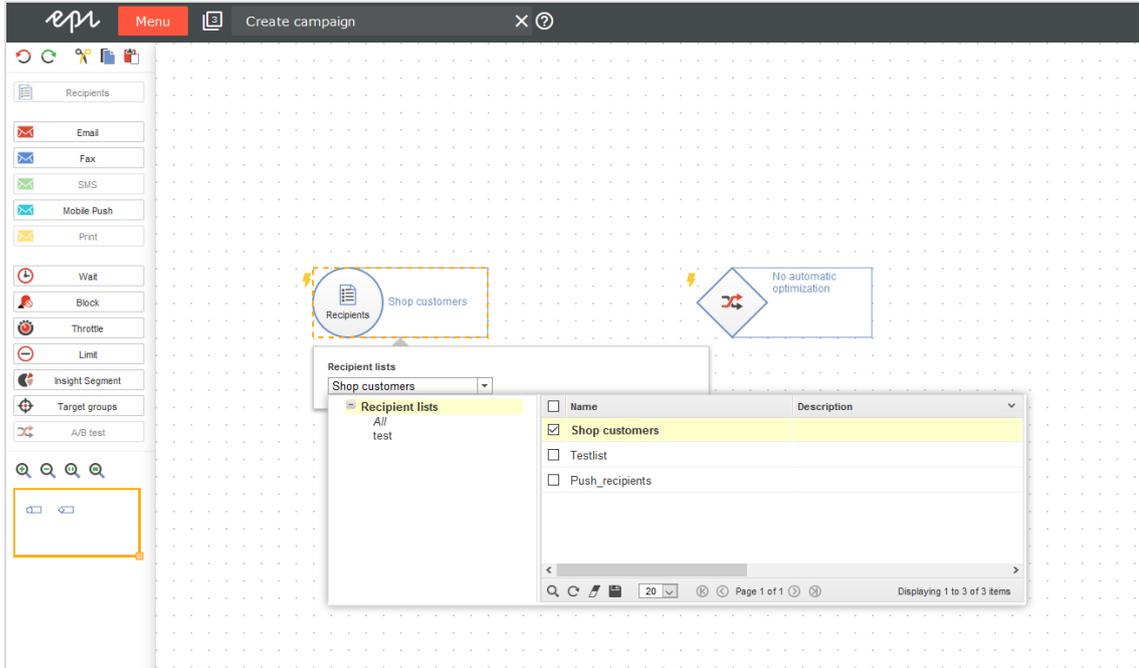
3. Connect the **Recipients** node to the **A/B test** node.
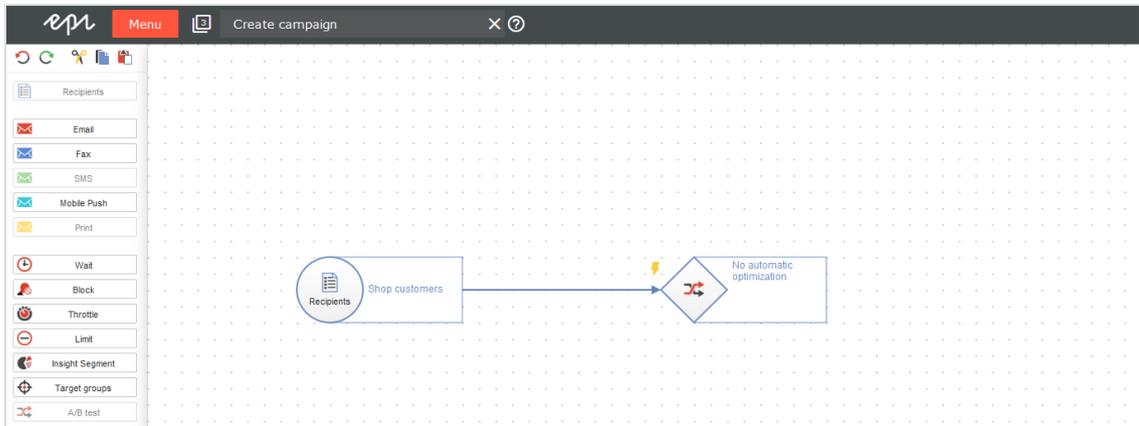
4. Drag a message node (Email or Mobile Push) onto the desktop. Create a new message or edit an existing message.
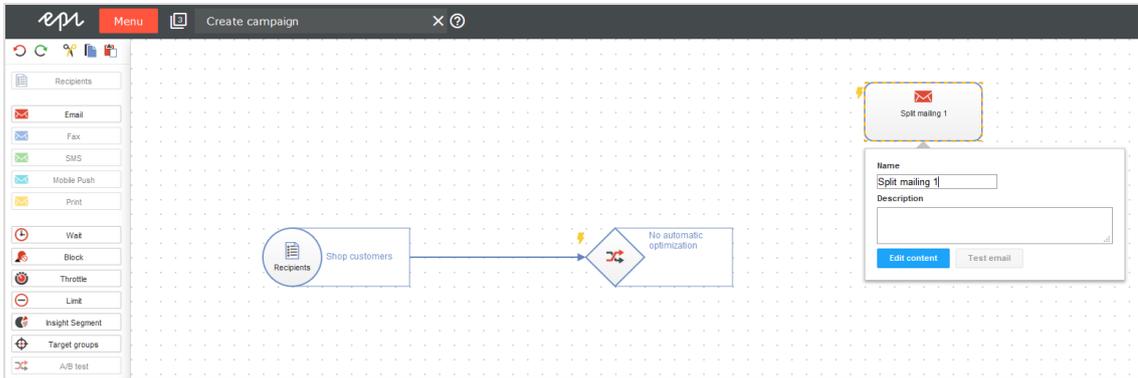
5. Drag another message node of the same type onto the desktop. Select the message that you used for the first message node and change the content according to the [criteria](#) that you want to test.
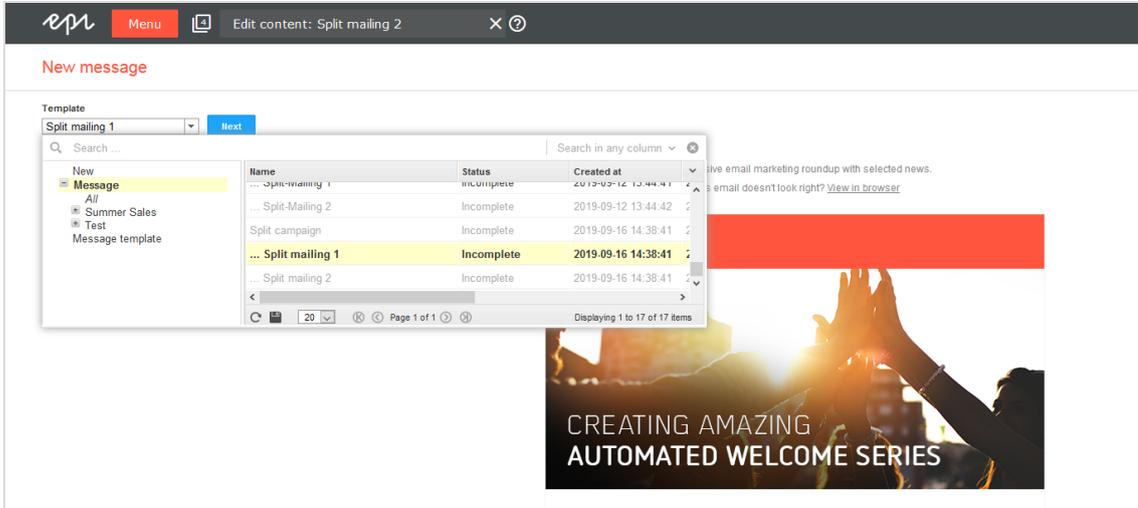
6. Add further message nodes if necessary and follow the description in point 5.

7. Connect each message node to the **A/B test** node.
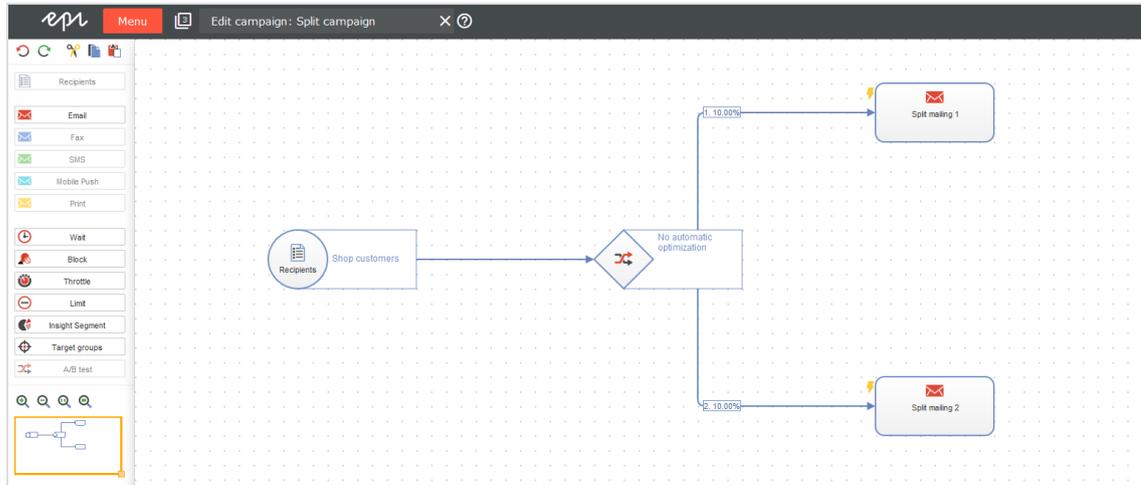
8. In the A/B Test node, optionally activate **Activate Automatic Optimization** and/or **Send time optimization**. For example, you can configure that the mailing with the best unique opening rate is automatically sent to the rest of the recipient list two days after the dispatch of the split mailings. For more information, see A/B test node and Configuring send time optimization in the A/B test node.
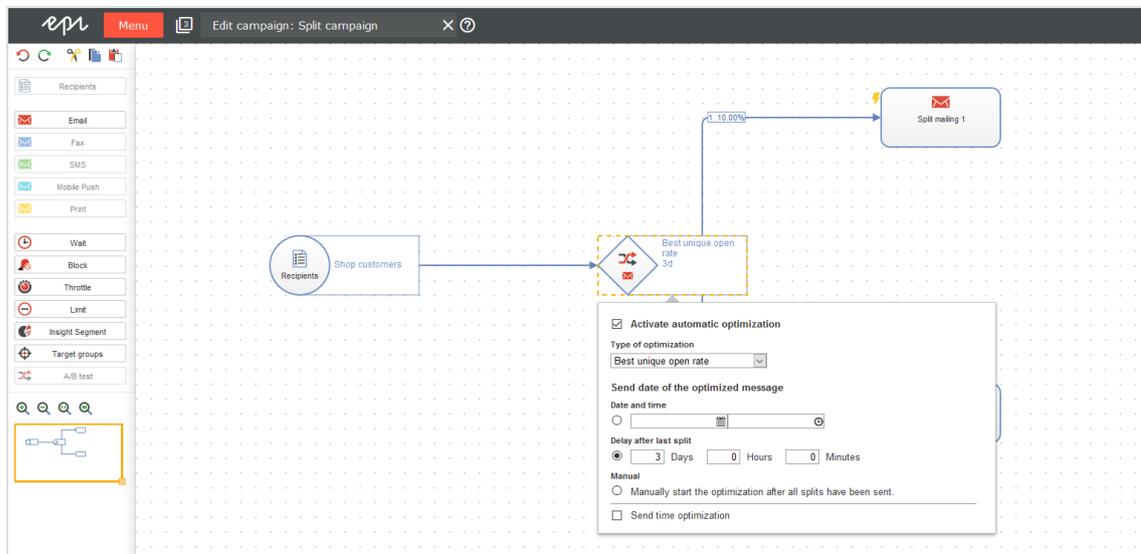
9. In the **Edit** menu of the respective connection, you can set, among other things, how many recipients should receive the split mailing. For example, if you select 10% for two split mailings, the mailing will be sent to the remaining 80% of the recipient list after the A/B test has been completed. For more information, see A/B test node.
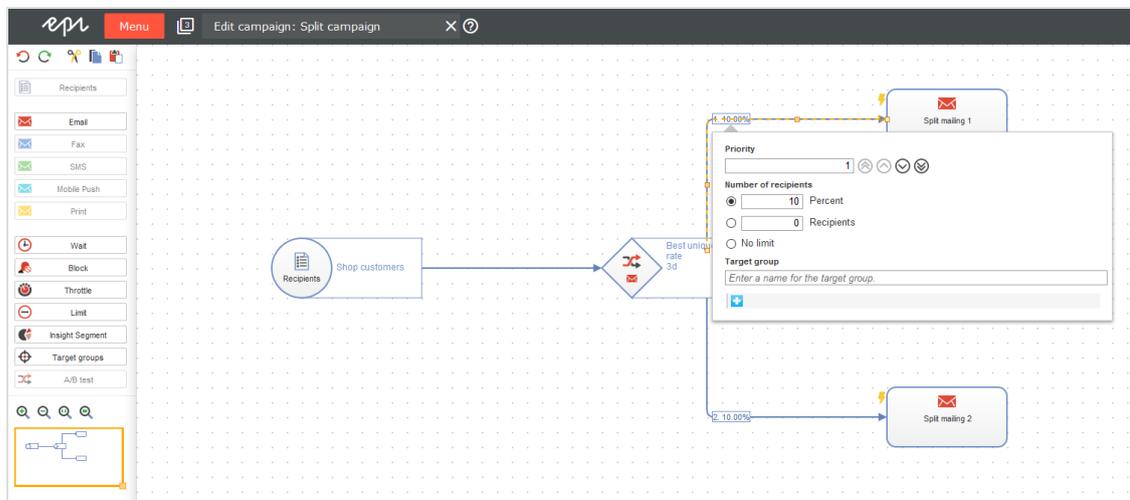
10. To complete the editing, click **Save and Close**. After the successful validation, your A/B test campaign is ready to be activated.

Split dispatch in Mailings Classic

A split mailing (also called split-run testing, A/B testing, or bucket testing) in Mailing Classics is a variation of a regular mailing where a subset of recipients is "split off." You can edit every split mailing like a regular mailing and can also have a completely different look to the master mailing.

> **Note:** A split mailing is associated with a master mailing, even if the master is moved to another folder.

1. In the **Mailings** window, select the desired mailing – which is called the master mailing – and click **Split**. The **Split dispatch** window opens.
2. You have two options.
   - Click **Add split (master mailing)** to create an exact copy of the master mailing with the same content. Edit this mailing by changing content elements, subject line, and so on.
   - Click **Add split (new mailing)** to create a new mailing with no content. Add the desired content as described in Mailings-Classic.

   In the **Splits** area, you can see the new split and existing splits of the selected master mailing. You can edit some parameters in the **Split** section of the **Split dispatch** window, including:
   - **Name**. This name is used internally. By default, the split receives the same name as the master mailing.
   - **Subject**. Enter your desired variation to test different subject lines against one another.
   - **Maximum number of recipients**. Specify the number of recipients whom the split should be sent (relative to master mailing recipients, in absolute numbers or a percentage).

- **Target groups**. Select up to three target groups for the split. See Target groups.
- **Sending date**. Set the dispatch date for each split. See Dispatch order.

3. Click **Save settings**. The split is displayed in the mailing list.

   In the list, splits appear indented below the master mailing they belong to. In the **Type** column, they are designated as **Split**.

Recipients

To perform an A/B test, during which the best option between split A and B is selected and sent out as master mailing, splits are typically sent to a subset of total recipients. Each split can be sent to an absolute number of recipients, or a percentage of total recipients. If percentage is selected, it is based on the number of master mailing recipients. This principle also applies if a split uses a recipient list other than the master mailing.

For selecting a subset of recipients from a recipient list:

- **Percentage**. Enter a percentage in the **Maximum recipients** field. The number of recipients is based on the total number of master mailing recipients.

  Or, enter an absolute value. If the split contains the corresponding number of recipients, it is sent to exactly that number.

- **Random**. Recipients are randomly selected from the list. If you do not use this option, emails are sent to split recipients according to their order on the list.

In both instances, recipients who receive one split email will not be sent another. Similarly, recipients who are on several lists only receive one email. Episerver Campaign monitors email addresses during dispatch to ensure that each recipient only receives one email (split or master mailing).

Recipient lists

In most cases, the same recipient lists are used for the master mailing and splits. However, for a split, you can use a recipient list other than master mailing.

> **Note:** The master mailing recipient list is the basis for calculating the number of split recipients.

To use different recipient lists for the master and split mailing, in the **Split dispatch** window, select **off** from the **Automatically use the best split for the master mailing** drop-down list.

If you are using different recipient lists in combination with recipient data-based target groups, be aware of potential conflicts between the different recipient lists. See Target groups.

Calculating recipients

The total number of recipients (master mailing and splits) is calculated every time before a mailing – including individual splits – is sent. The following illustration shows how subsets of recipients and the total number of recipients are calculated during dispatch.
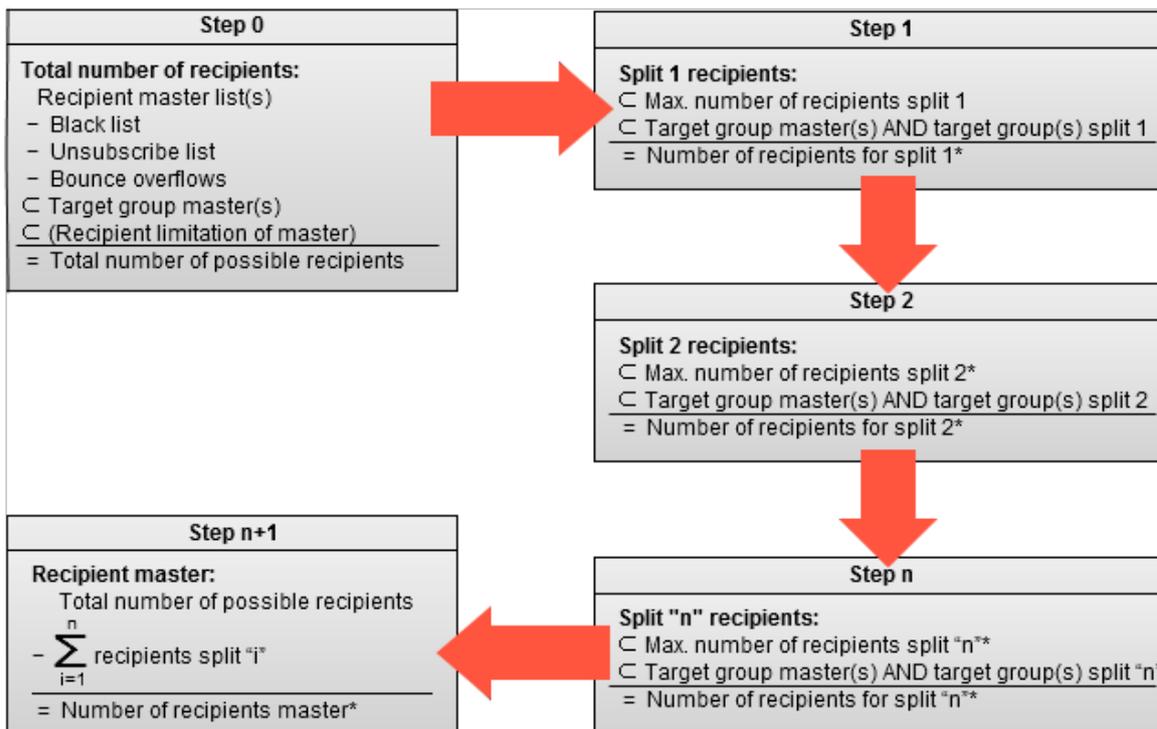
Recipient calculation

- The ⊂ symbol signifies that a subset of the total is being created.
- If a percentage is given for the number of split recipients, discrepancies between individual splits are possible, as cancellations and bounce overflows are taken into account for each case. This reduces the number of possible total recipients and the correspondingly calculated percentages.
- The number of possible recipients also considers the master mailing's target groups. If a target group with the recipient list of the master mailing contains fewer addresses than the same target group with the recipient list of the split, the number of recipients to be sent emails is the number calculated for the target group and recipient list of the master mailing.
- If the total recipient number is reached during the dispatch of a split, the subsequent splits and the master mailing are not be sent (see example 1 and example 2).

Target groups

Target groups used in the master mailing are inherited by the split mailings. You can add target groups to split mailings by linking with the target groups of the master mailing using AND logic.

The number of matches of a target group in the recipient list of the master mailing furthermore determines the maximum possible number of recipients for this target group. If the recipient list of a split contains more matching recipients for this target group, the total number of recipients sent an email will not exceed the number previously calculated on the basis of the target group and recipient list of the master mailing.

> **Warning: Master mailing vs. split target groups**
>
> Avoid target groups in the main and split mailings that exclude each other (for example, "Male" and "Female"), because no recipients will be selected for the split.

Note that the creation of target groups using recipient-based criteria can only apply when the corresponding criteria is also defined as a list box. Furthermore, if using a different recipient list for the split than for the master mailing, ensure that it incorporates the same data structure as the master mailing list – or at least that the list boxes for the master mailing target group can also be found in the split. The description of the corresponding list boxes must be an exact match, including capitalization.

Example

If a target group is used in the master mailing with the criteria **Recipients with interest "Football"**, the recipient lists of both the master mailing and the split must contain a common corresponding field, such as **Interests**.

Dispatch

To send a split mailing in the **Split** window, click **Start split** or select the check box below **Mailing schedule** and specify a dispatch date using the calendar.

Dispatch order

Set the order of splits in the lower section of the **Split mailing** window via arrow keys to the right of each split. Splits associated with a master mailing are part of a hierarchy, which is determined by the order of the splits. This split hierarchy is referenced when calculating recipients of splits and the master mailing.

> **Note: Split hierarchy vs. sending order**
>
> When individual splits are *manually* started, the split hierarchy applies, without regard for dispatch order. For example, if the last split in a list is sent first, the recip-

ients for the split and master mailings are calculated on the basis of the overall split hierarchy.

Under certain circumstances, this may lead to a split being sent to fewer or even no recipients despite having started first. This is because the splits higher up on the list are allocated the complete number of recipients, and no recipients remain for the subordinate split. For more information, see Recipient calculation examples.

If the split dispatch is started *automatically*, the split mailings are sent in the order of the split hierarchy.

Optimizing and sending the master mailing

Split sending lets you analyze each split's performance and send the best performing variation as a master mailing.

Episerver Campaign also offers an automatic optimization. To activate it, select one of the following criteria from the **Automatically use the best split for the master mailing** drop-down list. This criterion determines which split is chosen for the master mailing.

> **Note:** Which criterion you use depends on mailing type, the quality of recipient data, and your marketing goals.

- **Best unique open rate**. Split most opened by recipients (percentage).
- **Best unique click rate**. Split most clicked by recipients.
- **Best effective click rate**. Split with the best unique opens/unique clicks rate.
- **Lowest unique unsubscribe rate**. Split that created the fewest unsubscribes.
- **Highest turnover**. Split that created the highest revenue. This criterion only delivers valid results if Post-click tracking was configured for your client; otherwise splits have the result 0.
- **Lowest bounce rate**. Split that created the fewest bounces.

There are three options to start the master mailing.

- **Save mailing and start it manually later**. Start the master mailing manually by clearing the check boxes and selecting the default option when editing the mailing in the **Options** tab.
- **Sending date for the master mailing**. Set a sending date for the master mailing and select the check box to activate this option. Use this option if you usually send your newsletter at a certain day and time.
- **Sending delay for the master mailing after the last split mailing has been sent**. Set a delay between the sending of the last split mailing and the master mailing. Select the check box to activate this option.

Use this option to get reliable opens and click rates based on the split mailings, because not all recipients open and click the mailing immediately upon receiving it.

Split mailing examples

The following examples to help you understand the split module by showing recipient calculations and their results. They illustrate the hierarchies and dependencies of the master mailing and splits.

In all examples, it is assumed that recipients are valid (that is, no one is blocked, has canceled, or exceeded the bounce limit).

Example 1

The master mailing and splits are sent to the same recipient list. A limit on the recipient number is set in the master mailing. The splits comprise A/B testing (split A against split B) with different target groups. The recipient list contains 100 recipients (40 male, 40 female, 20 unspecified).

Mailing	Recipient list	Max. number of recipients	Target group	Sent emails
Master mailing	A	28% (= 28 recipients)	—	0
Split 1	A	—	male	28
Split 2	A	—	female	0

Result: The total number of recipients, as defined in the master mailing, was reached during the dispatch of split 1. No emails are sent to Split 2 and the master mailing.

Example 2

Master mailing and splits are sent to different recipient lists. A limit for the total number of recipients is defined in the master mailing. Recipient list A (master mailing) contains 200 recipients (60 male, 60 female, 80 unspecified). Recipient list B (splits) contains 100 recipients (40 male, 40 female, 20 unspecified).

Mailing	Recipient list	Max. number of recipients	Target group	Sent emails
Master mailing	A	28% (= 56 recipients)	-	0
Split 1	B	—	male	40
Split 2	B	—	female	16

Result: The total number of recipients is determined by recipient list A and the limit of recipients defined in the master mailing. Split 1, only sent to male recipients with no sending limit, is sent to male recipients in list A. Split 2 is subsequently sent to 16 female recipients from the same list. At this point, the total number of recipients limit is reached.

Example 3

The master mailing and splits are sent to the same recipient list. Recipient list A contains 100 recipients (20 male, 20 female, 60 unspecified). Three splits are created.

- Split 1 has the target group "male"
- Split 2 "female"
- Split 3 has the target group "male OR female" (so gender must be specified).

The master mailing does not define a target group. Split 3 is to be sent first.

Mailing	Recipient list	Max. number of recipients	Target group	Sent emails
Master mailing	A	—	—	60
Split 1	A	10%	female	10
Split 2	A	10%	male	10
Split 3	A	10%	unspecified	0

Result: While the first two target groups are subsets of the master mailing target group, the target group for split 3 and the master mailing group exclude one another. To select recipients who did not specify gender, the target group of the master mailing should be "males OR females OR blank field".

Send time optimization
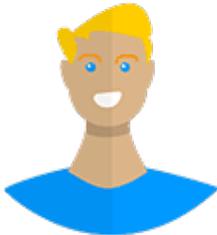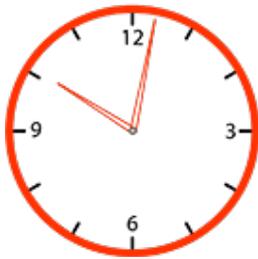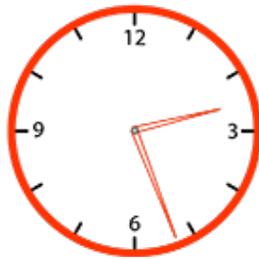
Peter Anna Thomas
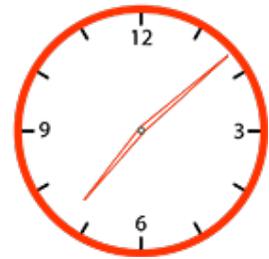
Send time optimization detects when recipients actually check their inbox, and sends your message to each individual at a time that matches the rhythms of their life. As a result, your email appears at the top of the inbox. Send time optimization ensures that your mailing is received during key, attention-grabbing minutes, and does not get lost at the bottom of the inbox with a bunch of other messages.

Send time optimization can increase the open rate for your messages by up to 25 percent. As a marketer, you benefit from the undivided attention of your recipients, which increases your return on investment.
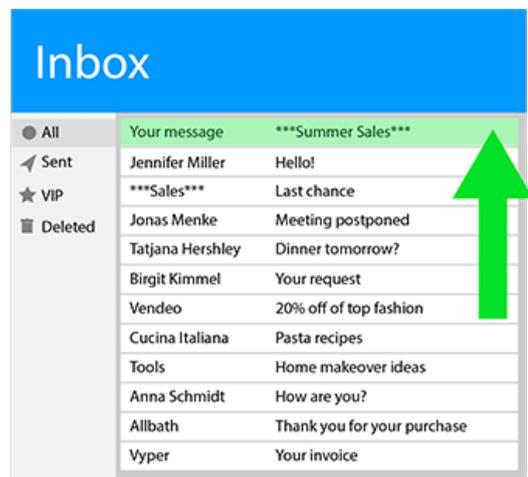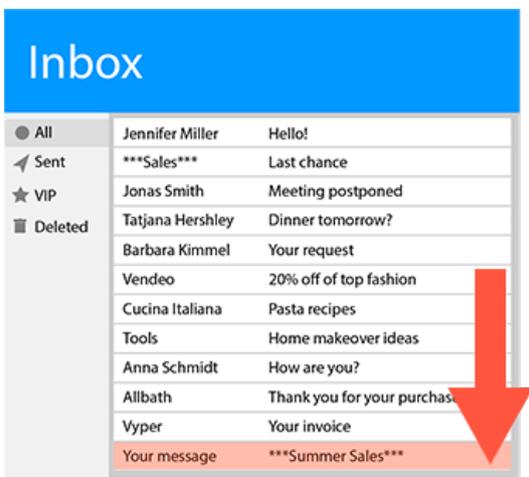
Why should you automate optimization?

Many marketers follow three simple rules to determine the best send time for their campaigns, based on the findings of various studies.

- Tuesday is the best day to send out mailings. Thursdays and Wednesdays are the next best days (the response rate by recipients is the highest in most industries on these days).
- Around 10 AM is better than early morning, afternoon, or evening (recipient responses are the highest at this time for most industries).
- Workdays are better than weekends.
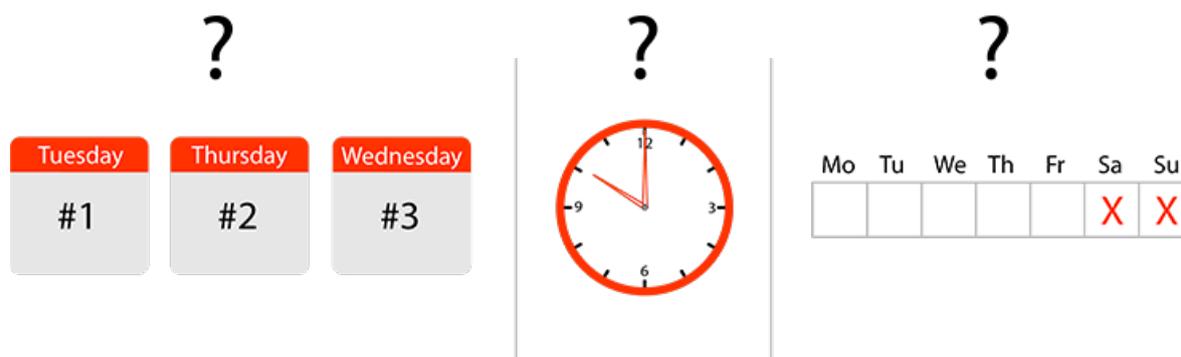
Although the rules are based on many studies and billions of data sets, they are derived from average values, and do not consider each recipient's preferences (and also do not apply to every industry). Do not rely on average values or the assumption that "one size fits all" – rather, learn about the particular lifestyles of your customers. Adjust your send times to accommodate the preferences of your recipients.

How it works

Send time optimization creates a personal profile for each recipient then analyzes their response behavior. Machine learning: The longer the customer relationship, the more accurate the optimized send time. And, if a recipient changes their behavior, their profile is updated accordingly.

The self-learning algorithm also analyzes click behavior and message opens, because opens by themselves do not provide sufficient evidence of whether a recipient is interacting with their inbox.

Around 70 percent of users now own a smart phone, and reach for it an average of 88 times a day to check their inbox or open a message, if only to reduce their unread message count to zero. When users check messages, they are much less likely to read emails in depth or to follow interesting links. Therefore, send time optimization considers the click behavior of recipients to determine when they are focused and responsive, not just clicking off a notification.
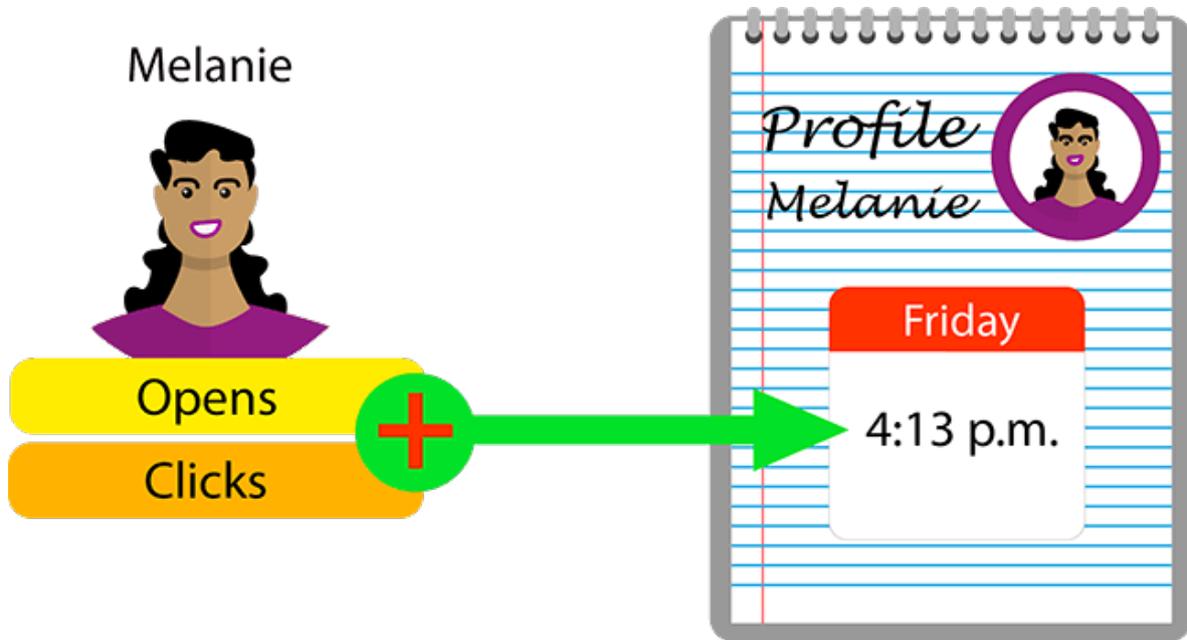
Benefits

- Increase the open rate for your emails by up to 25 percent.
- Decrease likelihood that your message will go unnoticed.
- Your advertising messages are perceived as less obtrusive.
- The service adjusts to the recipient's behavior, and changes the send time when a recipient changes habits.
- Send time optimization is automated.
- It has a low learning curve. The feature integrates with the familiar, standard features of Episerver Campaign.
- Virtually infinitely adjustable for up to 7 days.
- A fallback time can be set for new recipients for whom behavioral data is not yet available.
- Available for Smart Campaigns (including A/B tests).
- Analysis function to evaluate individual send times.

> **Tip:** Send time optimization is available only for the **Email** channel.

Setting up time optimization

To set up send time optimization, contact customer support. The feature as an extension:

- in the Wait node for Smart Campaigns
- in the A/B test node for Smart Campaigns
- in the campaign analysis

Configuring send time optimization in the Wait node

This topic describes how to enable and configure the send time optimization in the **Wait** node within Smart Campaigns.

Once configured, your message is sent to recipients with sufficient behavioral data at a personalized send time. Recipients who lack sufficient behavioral data receive your message at the fallback time.

1. Under **Send date**, specify a fallback.
2. Enable send time optimization.
3. Select the maximum length of time for the send time optimization.
4. Adjust the start and end times of the send time optimization and, if necessary, shorten the preset maximum length.
5. Check your settings in the info area.

Specifying a fallback time

If there is insufficient data about individual recipients to determine a personalized send time, your message is sent to these recipients at the set fallback time. To specify a fallback time, perform the following steps:

1. In the **Create campaign** window or the **Edit campaign** window within Smart Campaigns, drag a **Wait** node from the left action pane into the workspace between the **Recipients** node and the **Email** node.
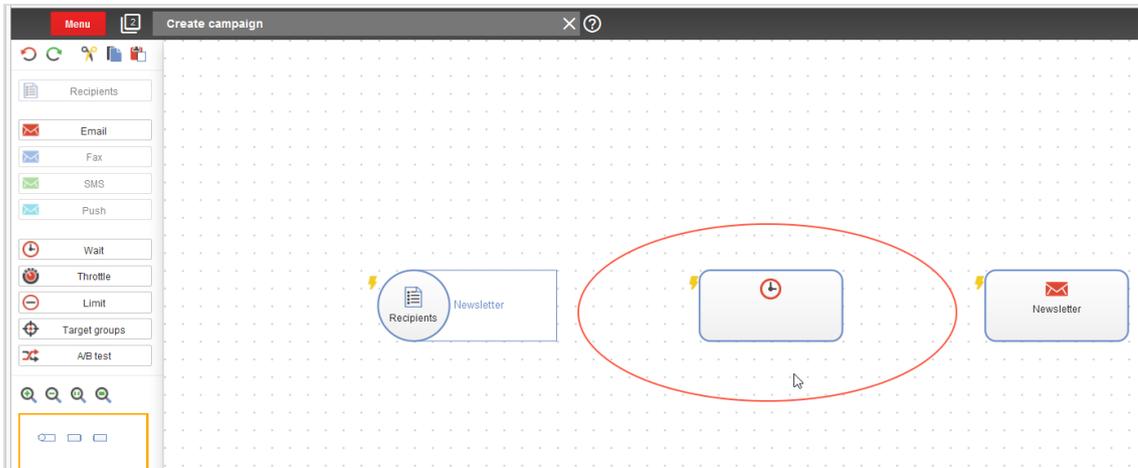
A context menu opens.
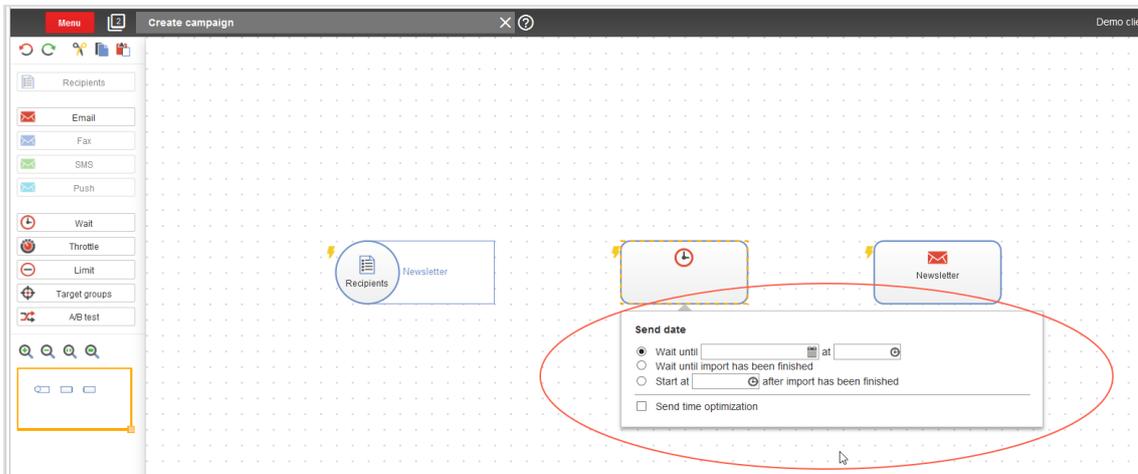
2. Under **Send date**, select an option and specify the fallback time.
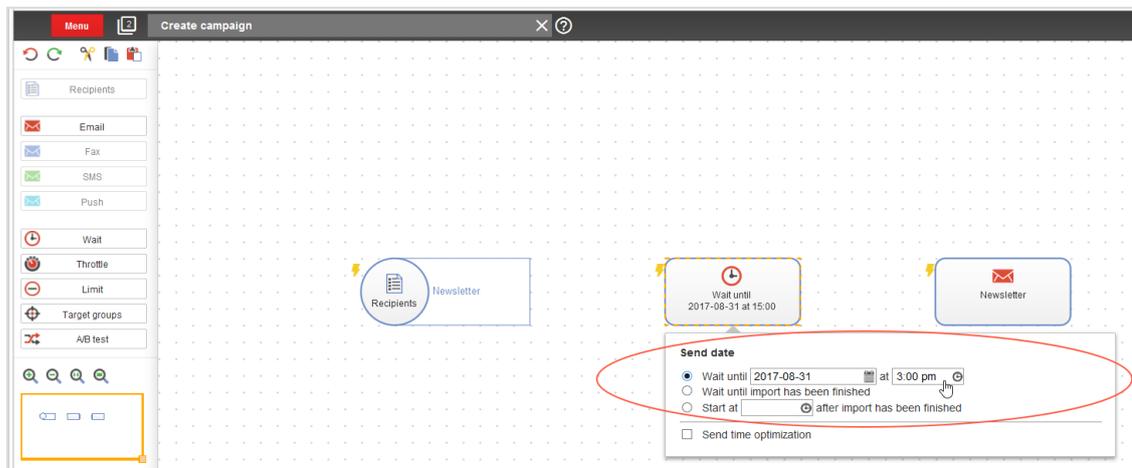
Option	The fallback time is set to	Configuration
Wait until ...	A fixed time.	Specify a date and a time.
Wait until import has been finished	Immediately after the recipient import is completed.	No configuration needed
Start at ... after import has been finished	A fixed time after the recipient import is completed.	Specify a time.

> **Note:** The **Wait until import has been finished** and **Start at ... after import has been finished** options are only available if the closed-loop interface is configured in your client. If the closed-loop interface is not configured, only the **Wait until ...** option is available.

> **Warning:** If the **Wait until import has been finished** or **Start at ... after import has been finished** option is selected, you cannot enable the campaign.

Enabling send time optimization

In the context menu, select the check box next to **Send time optimization**.
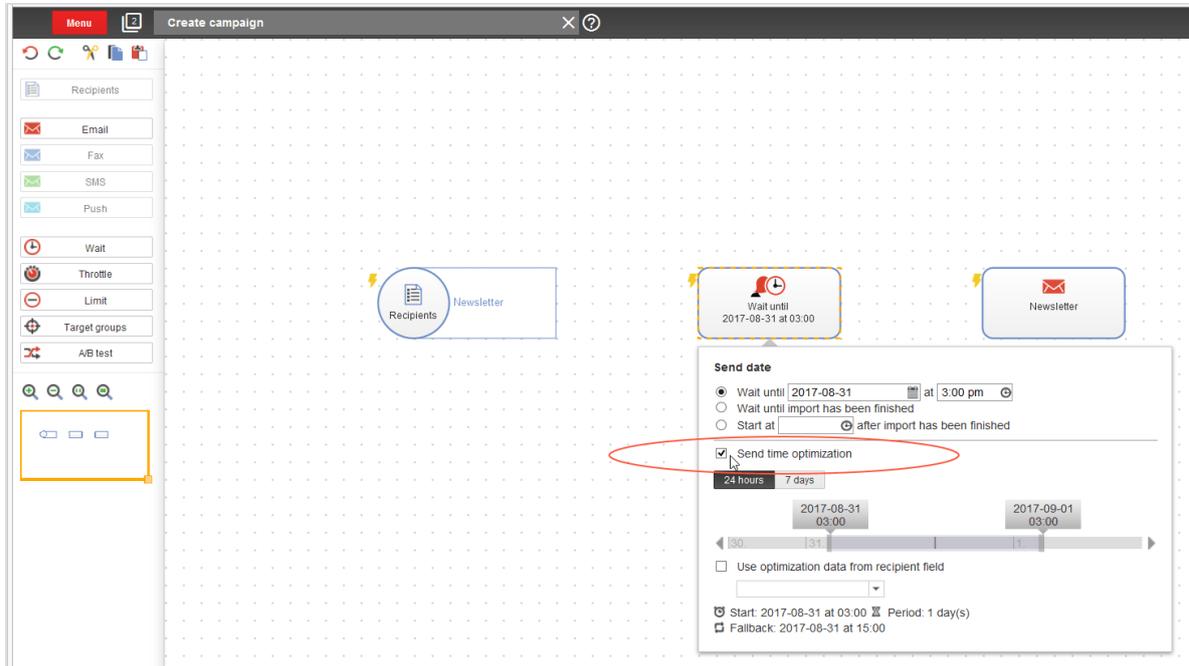
The **Wait** node's context menu includes:

- options for maximum length (24 hours or 7 days)
- a date slider
- an info area

Setting maximum length of time

Click **24 hours** or **7 days**.

Adjusting start and end times

You can adjust the start and end times of the send time optimization in 15-minute increments. If you make no changes, the start and end times are set so that the fallback date is the midpoint of the selected maximum length of time.

To adjust the start and end times without changing the maximum length of time, click the arrow keys on the sides of the date slider or adjust the slider using the computer mouse.

To adjust the start and end times and reduce the maximum length of time, click and grab the corresponding date tab with the computer mouse.

> **Tip:** You can adjust the **24 hours** and **7 days** defaults downwards and shorten the maximum length of time from 7 days to 3 days. You may want to do this for editorial purposes or short-term promotions.

Checking settings in the info area

Your current send time optimization settings appear in the info area. After completing the configuration, verify your settings in the info area, and change them if necessary.
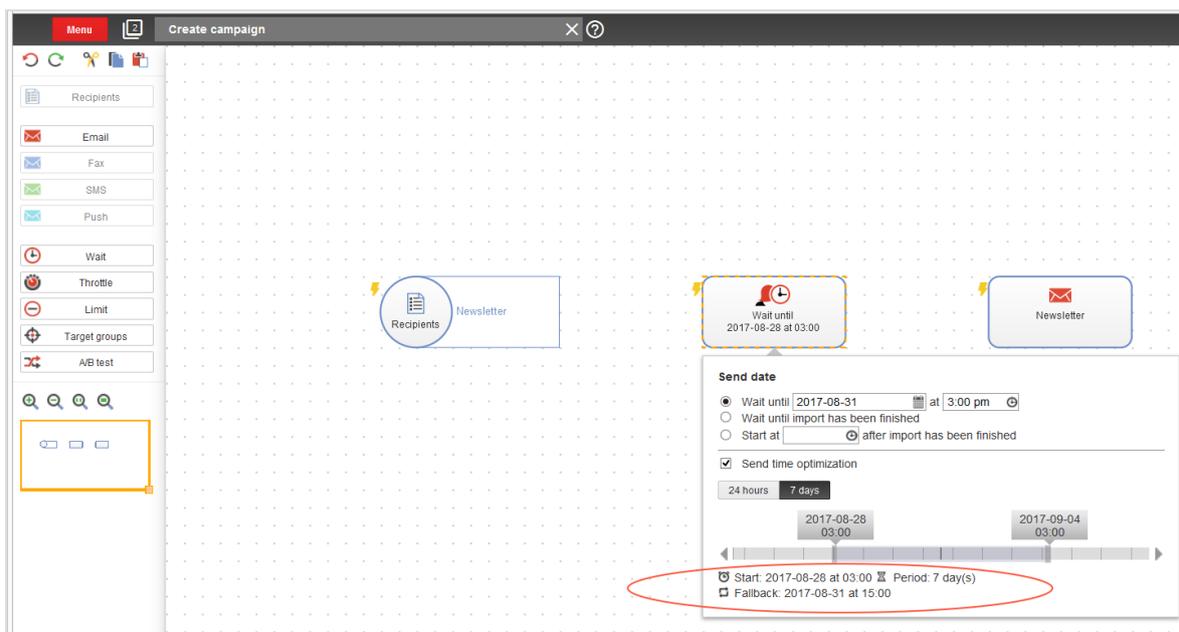
Configuring send time optimization in the A/B test node

If the **Send time optimization** feature is enabled in your client, additional options are available in the **A/B test** node within Smart Campaigns. This topic describes how to enable and configure the send time optimization in the **A/B test** node.

> **Note:** The send time optimization feature is available only for the **Email** channel.

Send time optimization in the **A/B test** node is used only to determine the personalized send time of the **optimized message** (the *main mailing*). To optimize the time of sending of individual split mailings, use a separate **Wait** node for each split mailing and configure the send time optimization in the [Wait node](#).

> **Tip:** The end of this topic shows examples with figures illustrating which node you need for which scenario (an **A/B test** node and/or a **Wait** node):
>
> 1. Configure send time optimization <u>only for the optimized message</u> (the *main mailing*).
> 2. Configure send time optimization <u>only for split mailings</u>.
> 3. Configure send time optimization for <u>both</u> split mailings and the optimized message.

To configure send time optimization in the **A/B test** node, follow these steps.

1. Under the **Send date** specify a <u>Fallback time</u>.
2. <u>Enable</u> the send time optimization.
3. Select the <u>maximum length of time</u> for the send time optimization.
4. Adjust the <u>start and end times</u> of the send time optimization and, if necessary, shorten the preselected maximum length.
5. Check your settings in the <u>info area</u>.
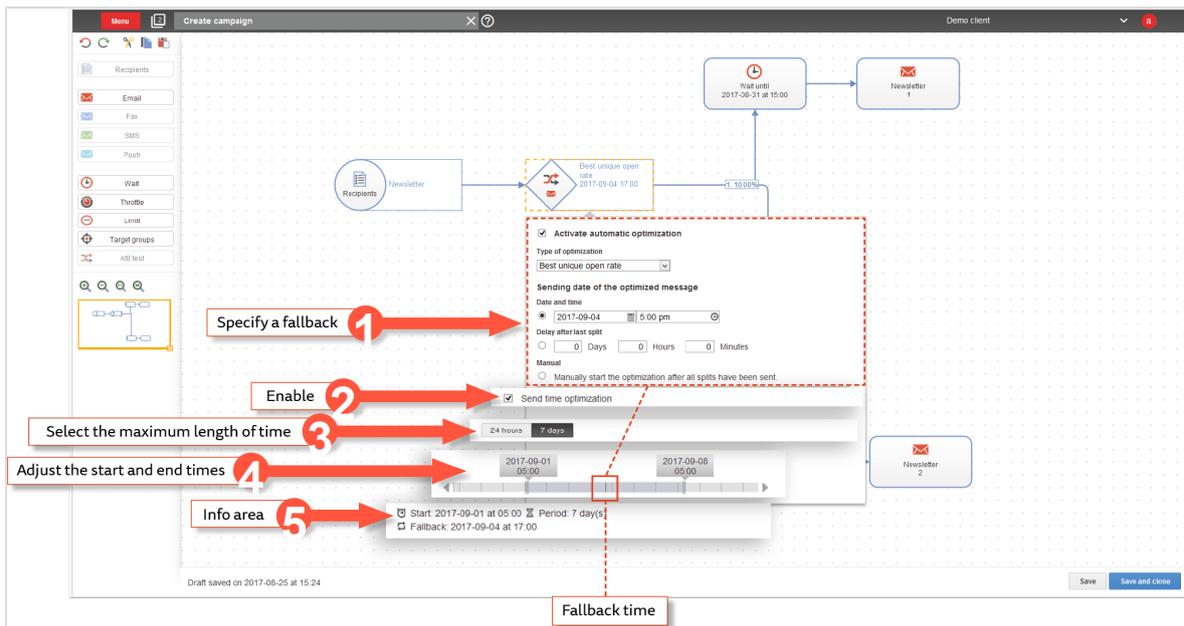
Specifying a fallback time

If there is insufficient data about individual recipients to determine a personalized send time, your optimized message is sent to these recipients at the fallback time. To specify a fallback time:

1. In the **Create campaign** window or the **Edit campaign** window within Smart Campaigns, drag an **A/B test** node from the left action pane to the workspace, between the **Recipients** node and the **Wait**

node/**Email** node.
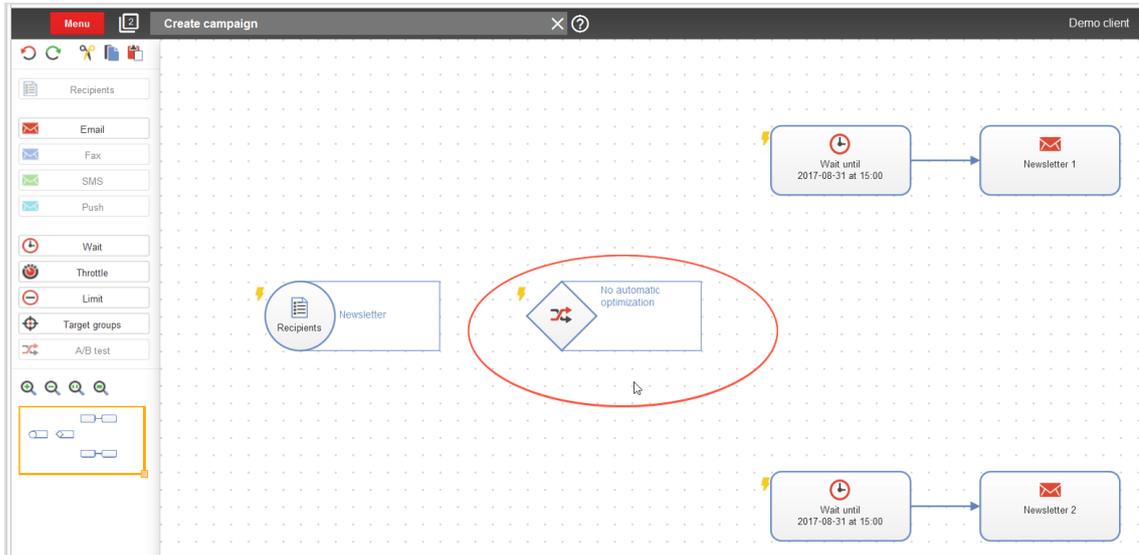
A context menu opens.
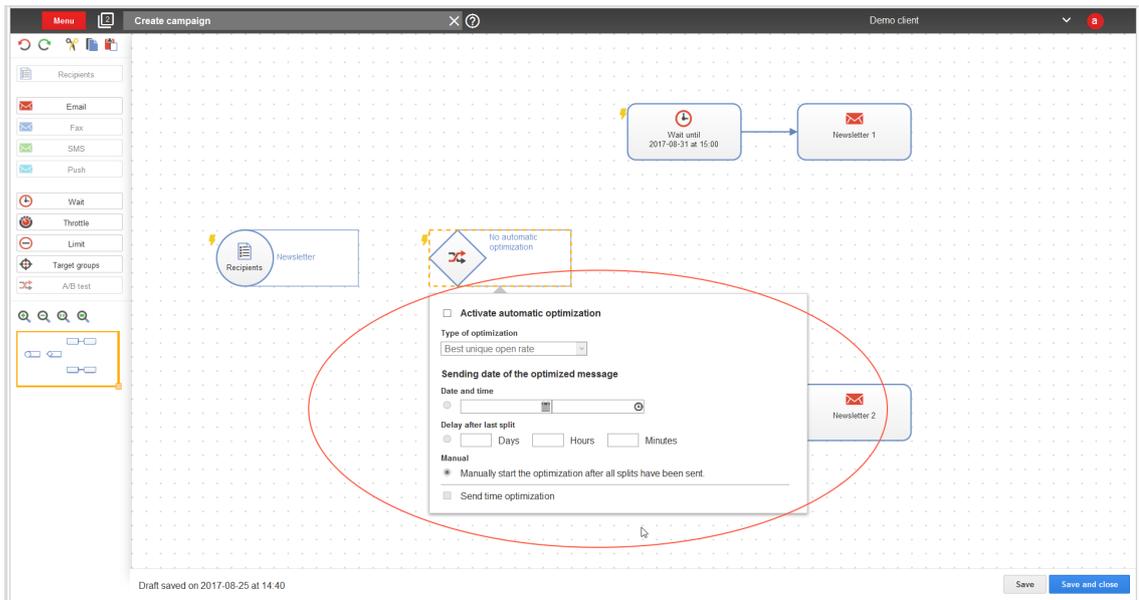
2. To enable automatic optimization, select the check box next to **Activate automatic optimization**.
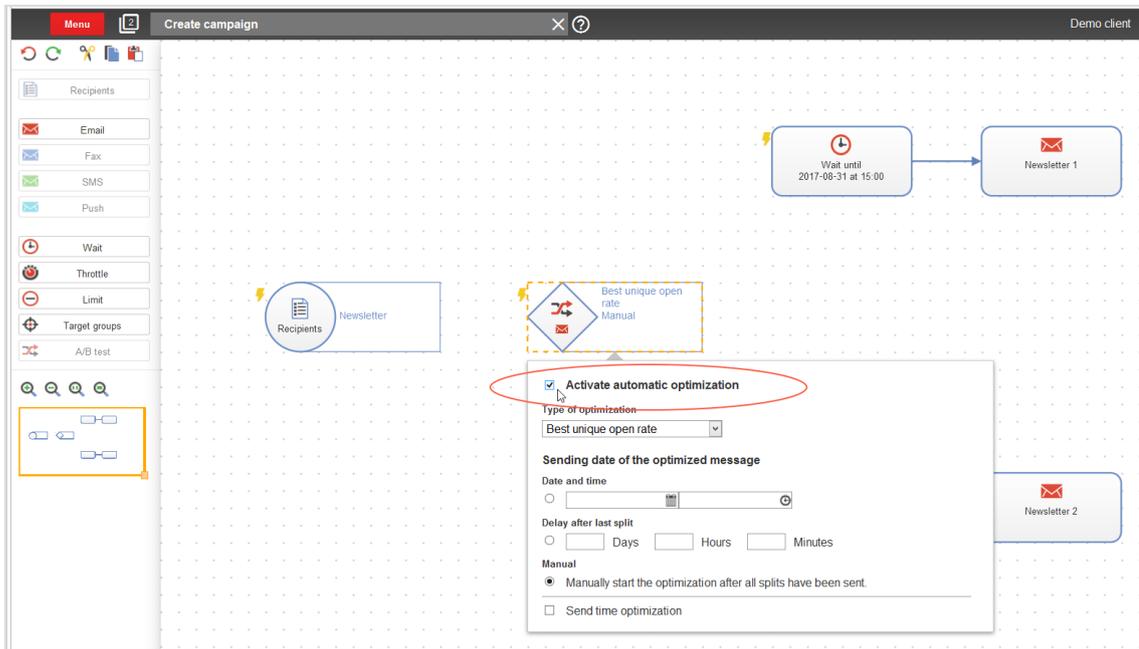
3. In the drop-down list, select the type of optimization.
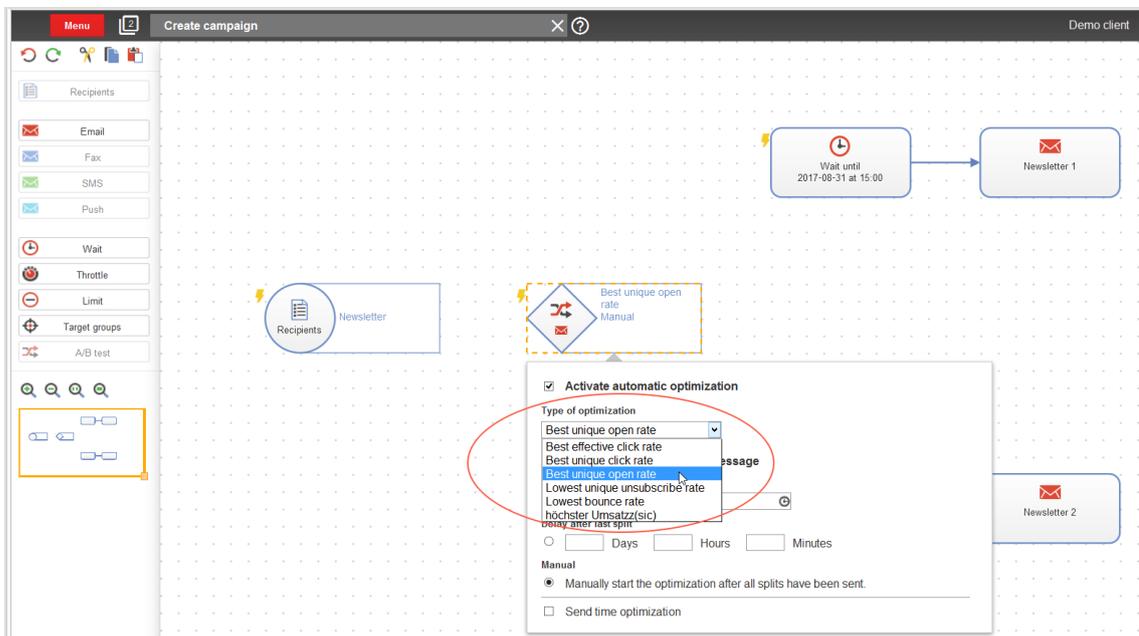
4. Under **Sending date of the optimized message**, select an option and specify the fallback time.
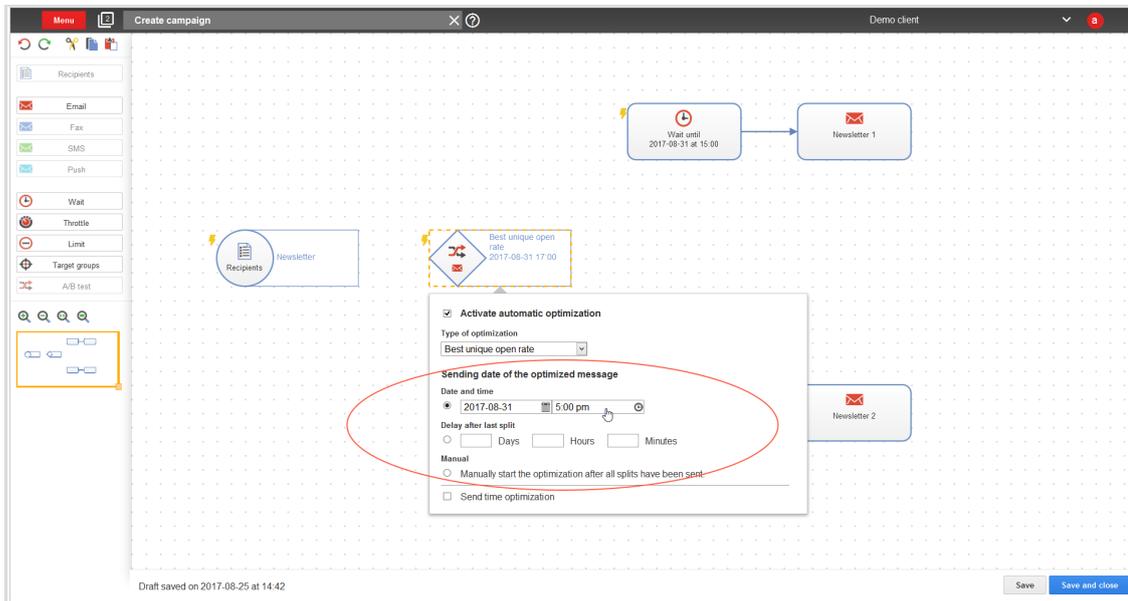

Option	The fallback time is set to	Configuration
Date and time	A fixed time.	Specify a date and a time.
Delay after last split	Immediately after the delay.	Specify the delay time.
Manual	The manual start time.	No configuration step needed.

Enabling send time optimization

Enable the send time optimization feature after setting the fallback time.

In the context menu, select the check box next to **Send time optimization**.
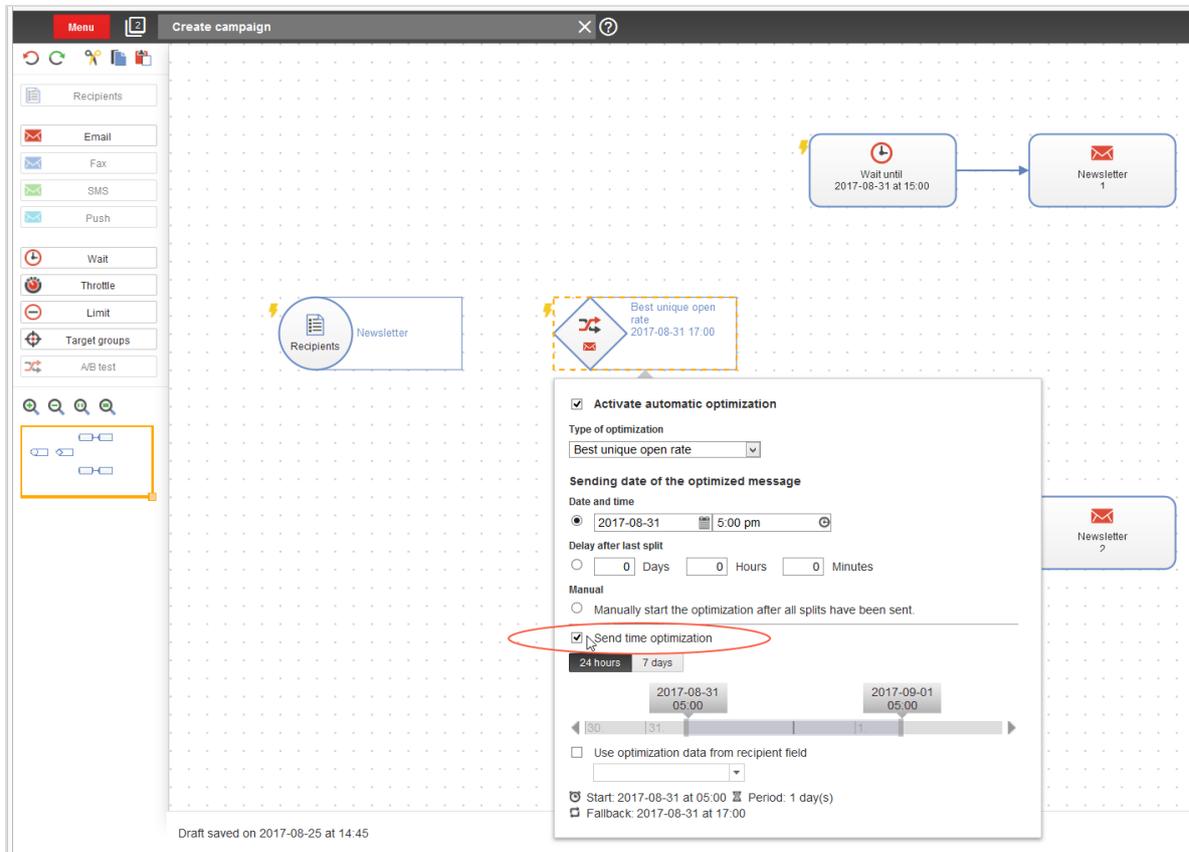
You have enabled send time optimization. The context menu now includes:

- options for the maximum length of time (only for the fallback **Date and time**)
- a date slider
- an info area

Setting maximum length of time

Set the maximum length of time that Episerver Campaign can use to optimize the sending of optimized messages/main mailings:
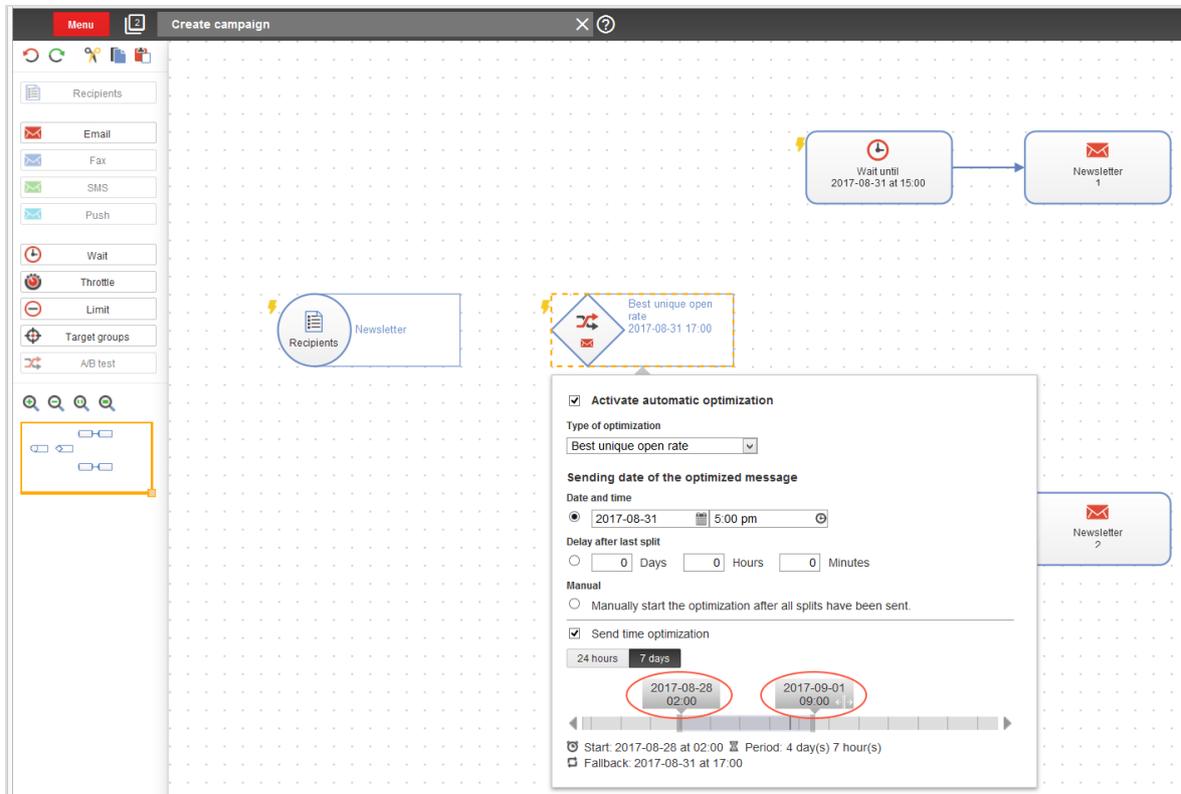
Click **24 hours** or **7 days**.

Adjusting start and end times

You can adjust the start and end times of the send time optimization in 15-minute increments. If you make no changes, the start and end times are set so that the fallback date is the midpoint of the selected maximum length of time.

To adjust the start and end times without changing the maximum length of time, click the arrow keys on the sides of the date slider or adjust the slider using the computer mouse.

To adjust the start and end times and reduce the maximum length of time, click and grab the corresponding date tab with the computer mouse.

> **Tip:** You can adjust the **24 hours** and **7 days** defaults downwards and shorten the maximum length of time from 7 days to 3 days. For example, for editorial purposes or short-term promotions.

Checking settings in the info area

Your current send time optimization settings appear in the information area.

Check your specified configuration in the info area, and change your settings if necessary.
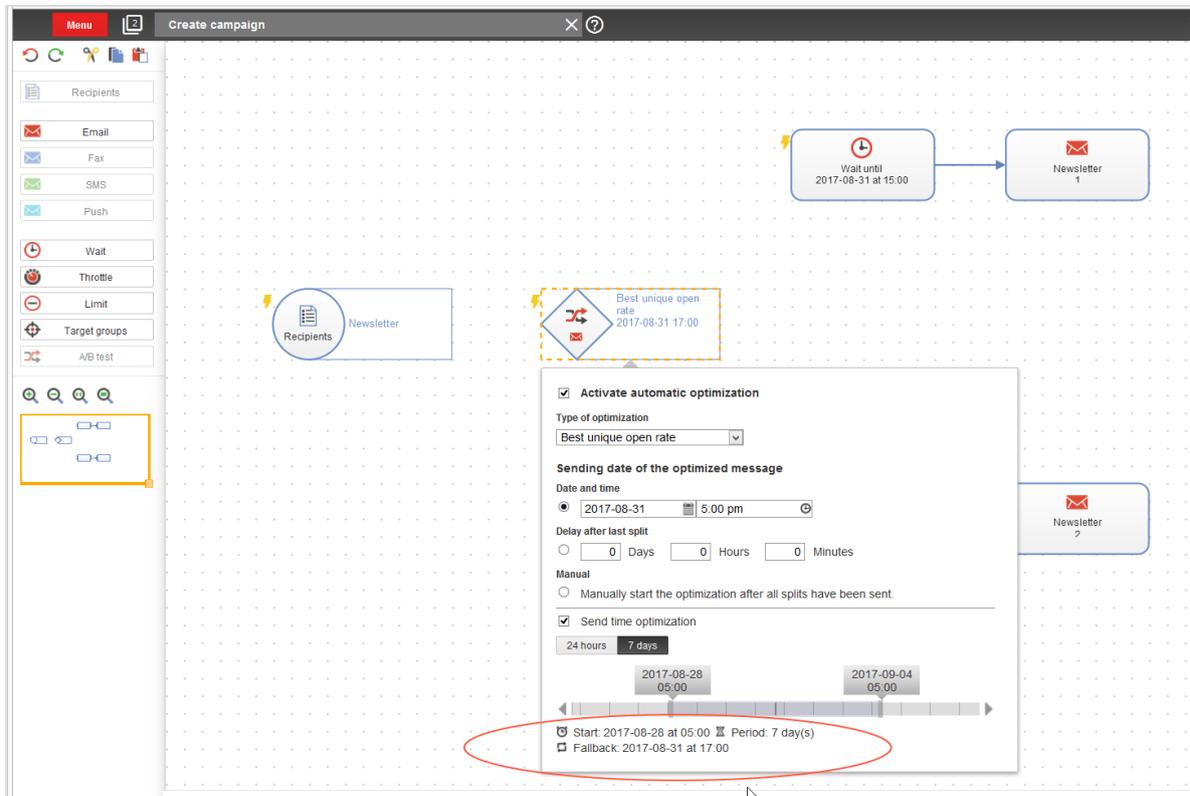
A/B test node examples

You can configure send time optimization in one of three ways for an A/B test:

1. [Only for the optimized message](#) (main mailing)
2. [Only for split mailings](#)
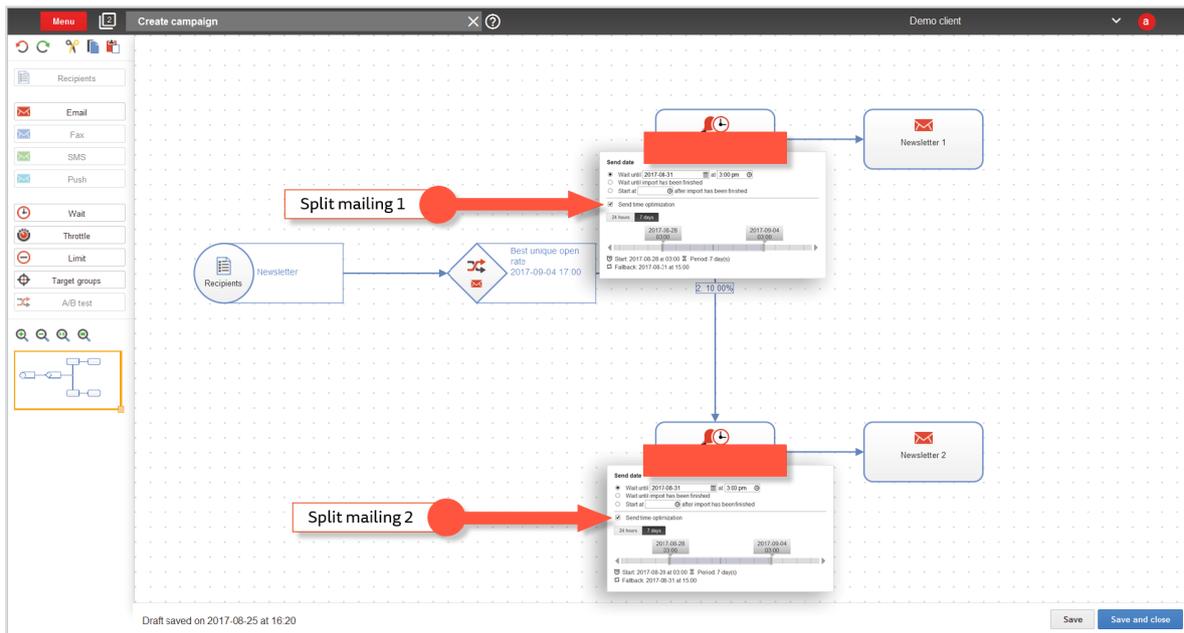3. For [both](#) split mailings and for the optimize message

Only optimized message/main mailing

To only configure the send time optimization for the optimized message or the main mailing, configure the send time optimization in the **A/B test** node only.

Main mailing
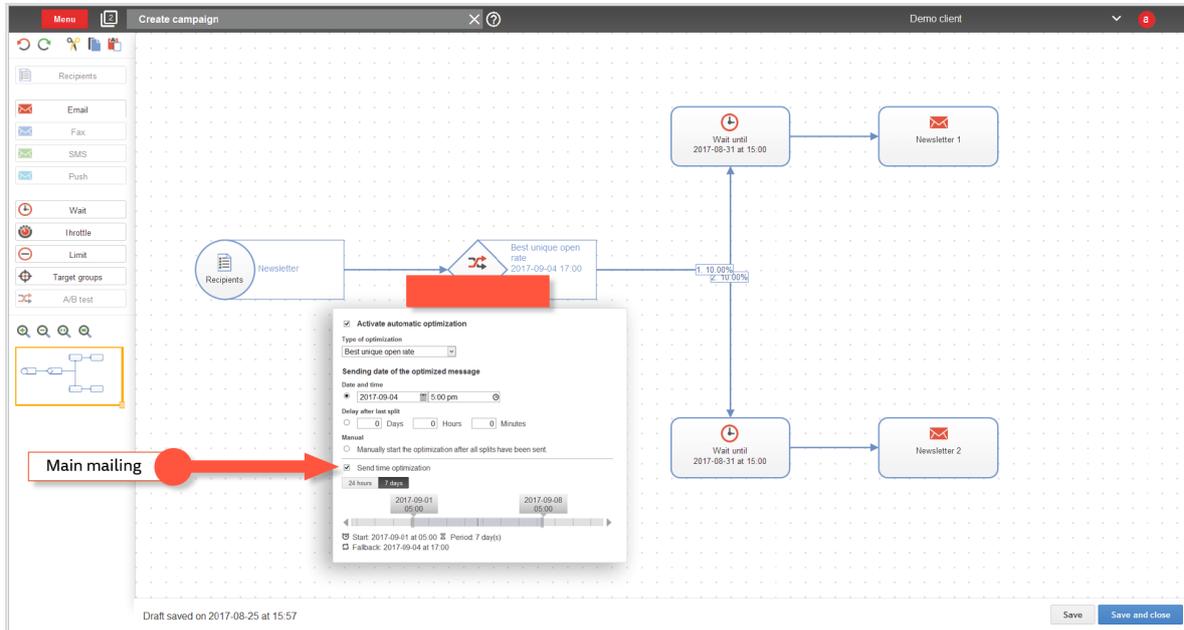
Only split mailings

If you want to send split mailings using a send time optimization, use a separate **Wait** node for each split mailing, and configure the send time optimization in each **Wait** node.

Split mailing 1

Split mailing 2

Both split mailings and optimized message or main mailing

If you want to configure a send time optimization for both split mailings and the optimized message or main mailing, configure the send time optimization in the **A/B test** node and in the **Wait** node of the split mailing.
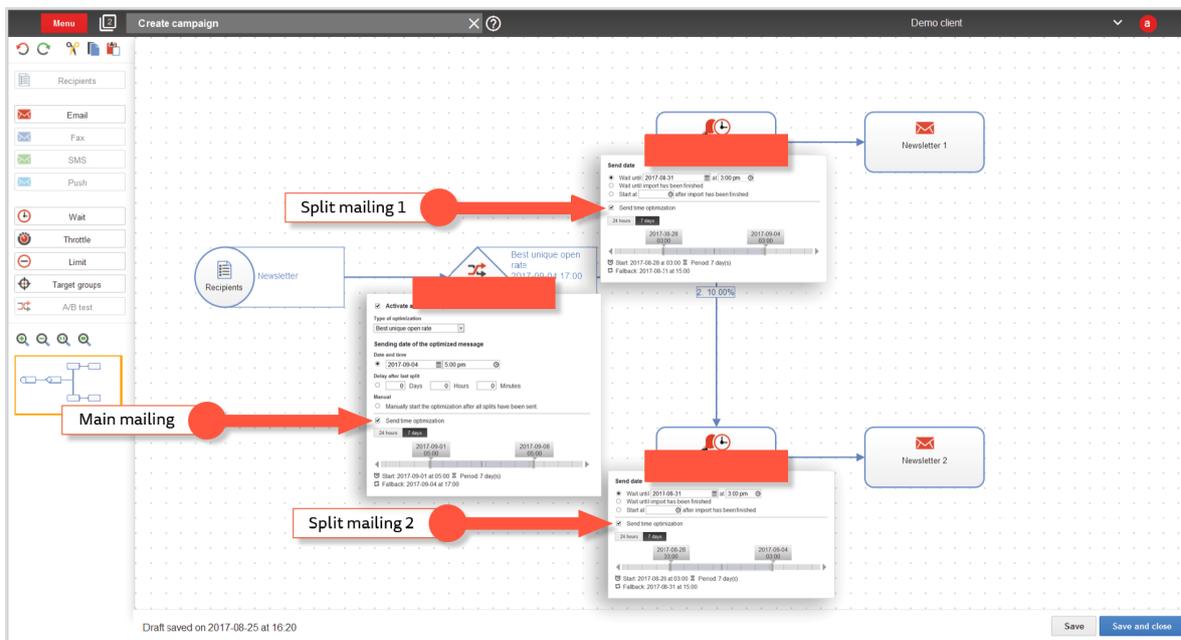
For information about the Smart Campaigns node and the split dispatch, see [Smart Campaigns nodes](#) and [Sending a split mailing](#).

Analyzing mailing send times

If send time optimization is set up in your client, you will have access to the **Send time optimization overview**, an additional analysis feature of Smart Campaigns, The overview analyzes the distribution of mailing send times and peak send times. The overview also displays the number of recipients to whom your message is sent at the fallback time because there was insufficient data to determine a personalized send time.

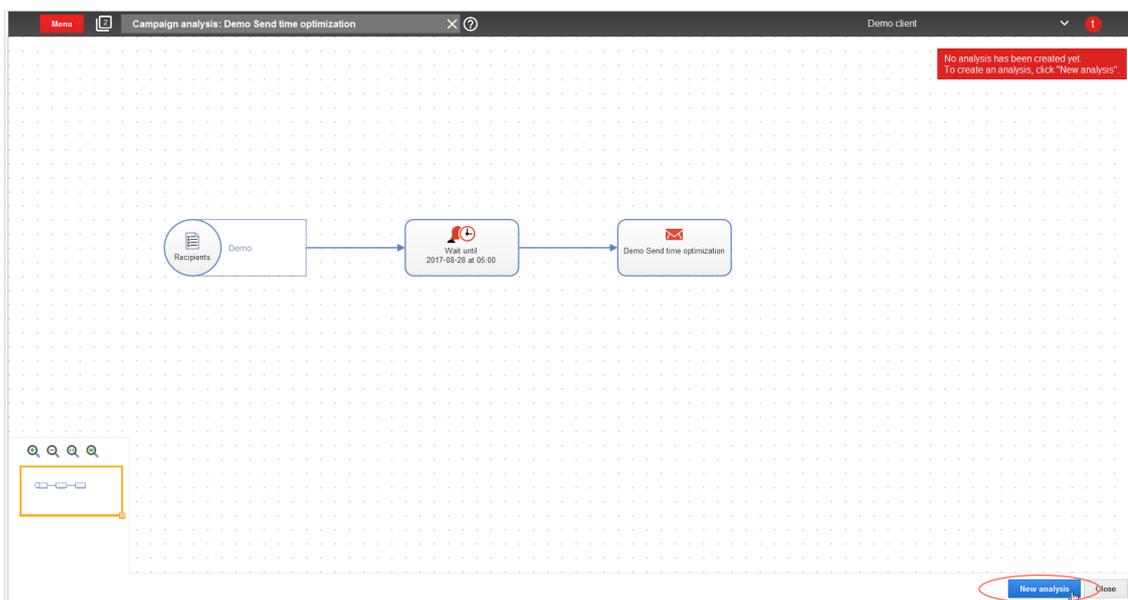To generate and view the send time optimization overview, follow these steps.

1. Open the start menu and select **Campaigns** > **Smart Campaigns**. The **Smart Campaigns** window opens.

2. Select the campaign to generate an analysis and view the **Send time optimization overview**.
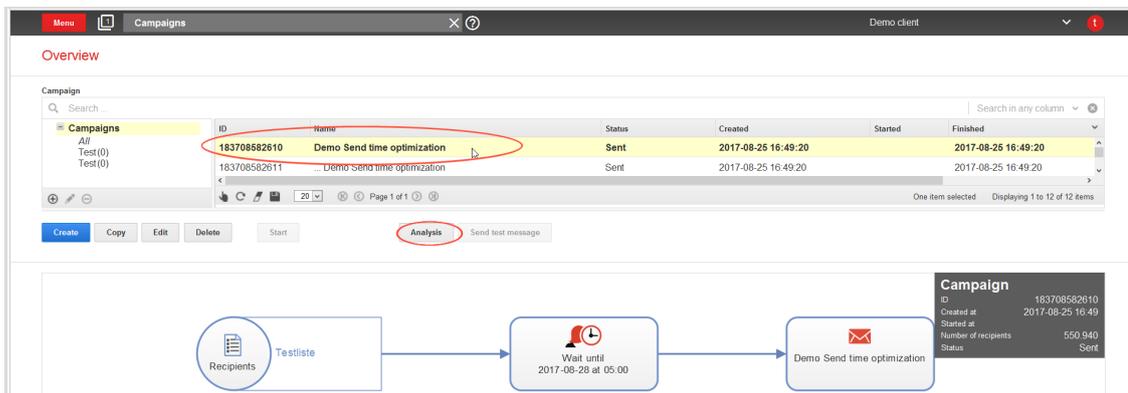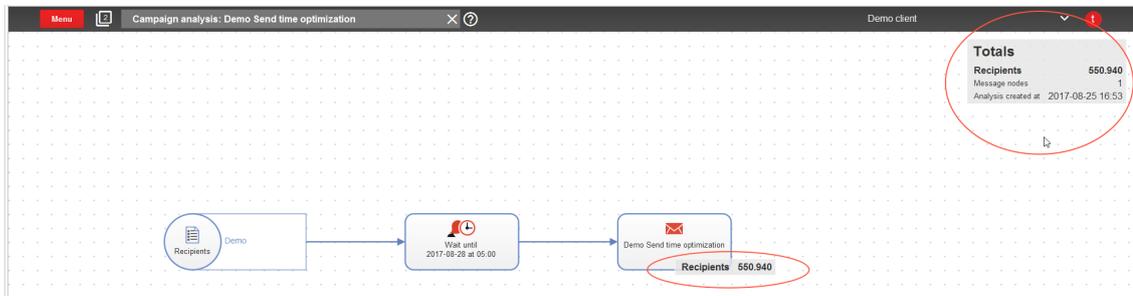

3. Click **Analysis**. The **Episerver Campaign analysis** window opens.
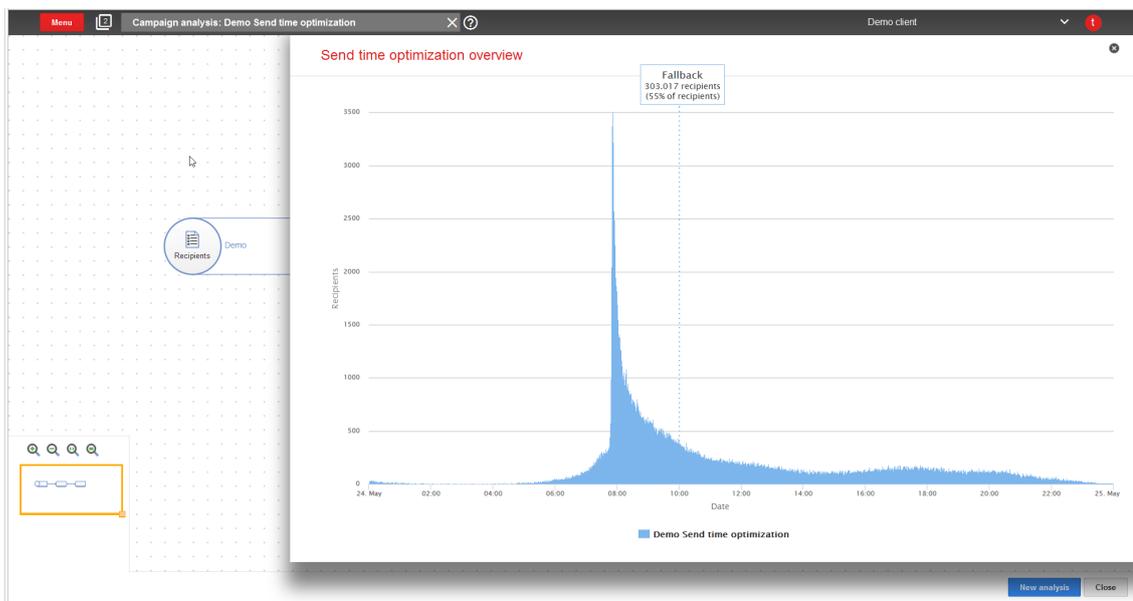4. Click **New analysis**.

A new campaign analysis containing the **Send time optimization overview** is created. Next, you see context menus with data about recipients and the campaign nodes.

> **Note:** It may take a few minutes to generate the analysis.

5. To view the **Send time optimization overview**, click the corresponding **Wait** node or **A/B test** node. The overview appears.

6. The **Send time optimization overview** display the distribution of mailings, peak send times, and number of recipients to whom your message was sent at the fallback time.

- To zoom in on the graphic, click and drag the computer mouse over the desired time window.

- To return to the default view, click **Reset zoom**.

7. To close the **Send time optimization overview**, click **Close** ⊗ in the upper right corner.

Validating mailing prior to dispatch

> **Note:** Contact <u>customer support</u> to activate this feature.

This add-on validates whether predefined parameters of a mailing are met. The validation is carried out prior to dispatch or when the mailing is saved. You can configure this automatic test for virtually any parameter of a mailing. You can validate against a defined value or check if a parameter is set.

Examples

- Mailing must contain an attachment
- Maximum number of emails per hour is set for dispatch and lies within a defined range
- Target group is selected

Sending automatic notification after dispatch

> **Note:** Contact customer support to activate this feature.

This add-on sends a notification to an email address after a mailing is sent. The notification contains sending date and time, number of recipients, and additional mailing details.

Sending S/MIME-signed emails

Send S/MIME signed emails via Episerver Campaign and increase your recipients' confidence. Thanks to your digital signature, your recipients can rest assured that the messages were sent by you, and the content was not subsequently manipulated. The digital signature includes components of an email, for example, attachments.

> **Note:** Digital signatures only ensure data integrity and do not apply to confidentiality. Emails protected with a digital signature are still sent as plain text. Message encryption of the S/MIME standard is not supported.

> **Note: Prerequisites**
> To send S/MIME-signed emails via Episerver Campaign, you need the following:
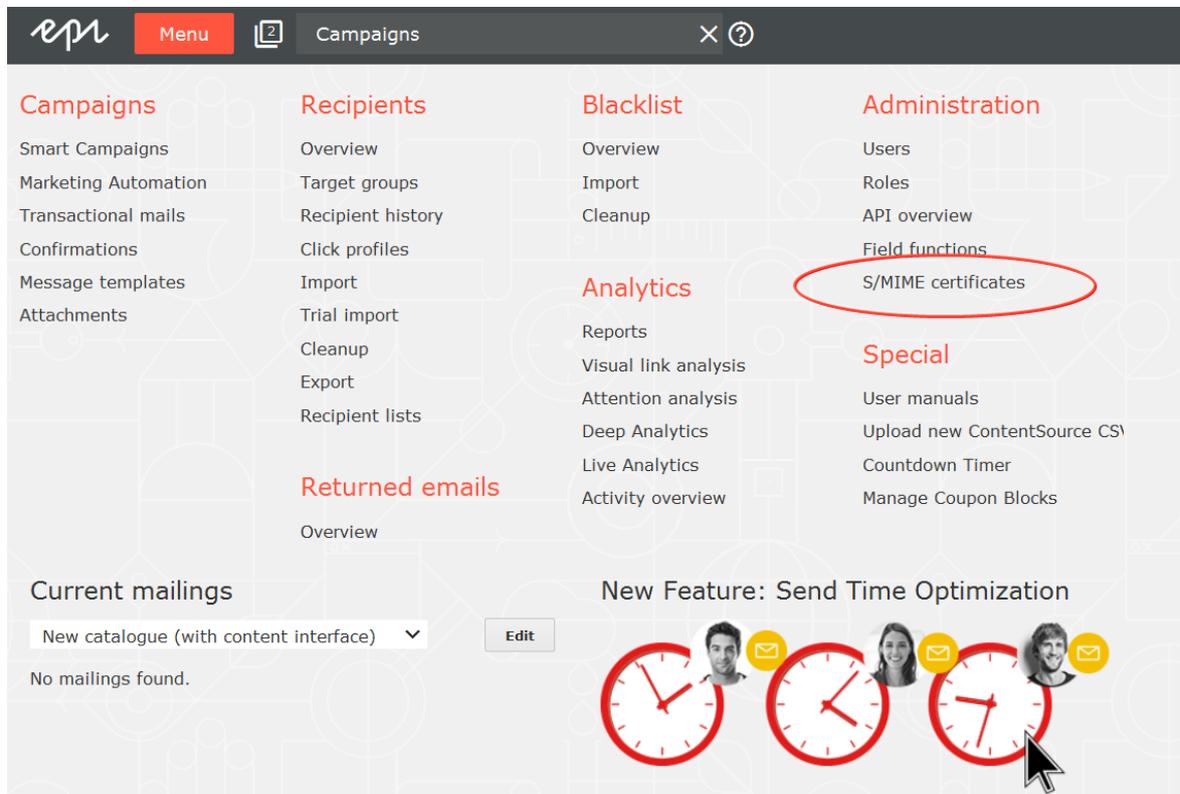
- **S/MIME certificates** feature
- S/MIME certificate issued by a certification body, which certifies the authenticity of the respective email address, for each email address used to send messages

Setting up S/MIME certificates

> **Note:** Contact customer support to activate this feature.

Go to start menu > **Administration > S/MIME certificates**.

To get an S/MIME certificate for your email, contact the certification body.

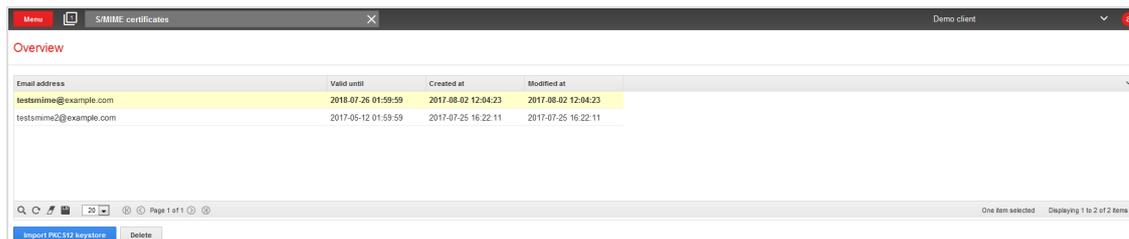# Importing S/MIME certificates

To import one or several S/MIME certificates, perform the following steps.
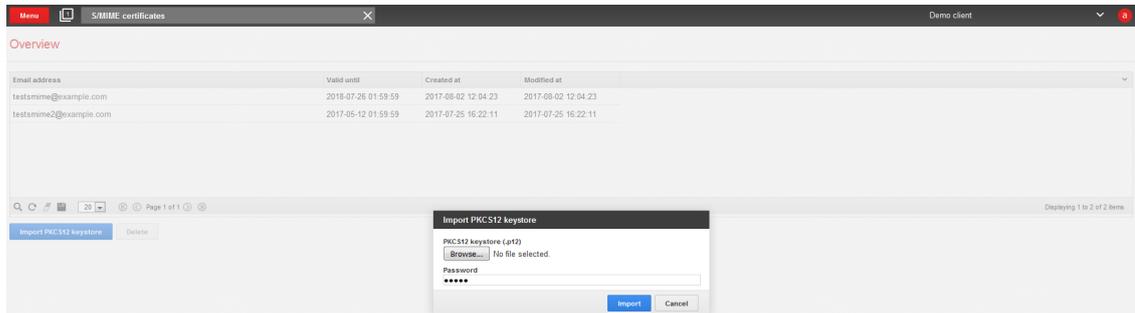
> **Note:** The certificate file must be in PKCS12 format. If it is not available that format, convert the file to that required format.

1. Go to start menu > **Administration** > **S/MIME certificates**. The **S/MIME certificates** window opens.

2. Click **Import PKCS12 keystore**. The **Import PKCS12 keystore** dialog box appears.

3. Click **Browse…** and select the certificate file to upload.
4. In the **Password** box, enter the backup password for your certificate file.
5. Click **Import**.

   You can find the certificate file in the list in the overview. See the list for information about the associated email address, the certificate's validity date, the creation and modification dates, and when the certificate is uploaded or changed.

   > **Tip:** If you stored a S/MIME signature for your sender address, the notification **signed with S/MIME** is displayed in the **Edit content** window above your sender address any time you edit a message.
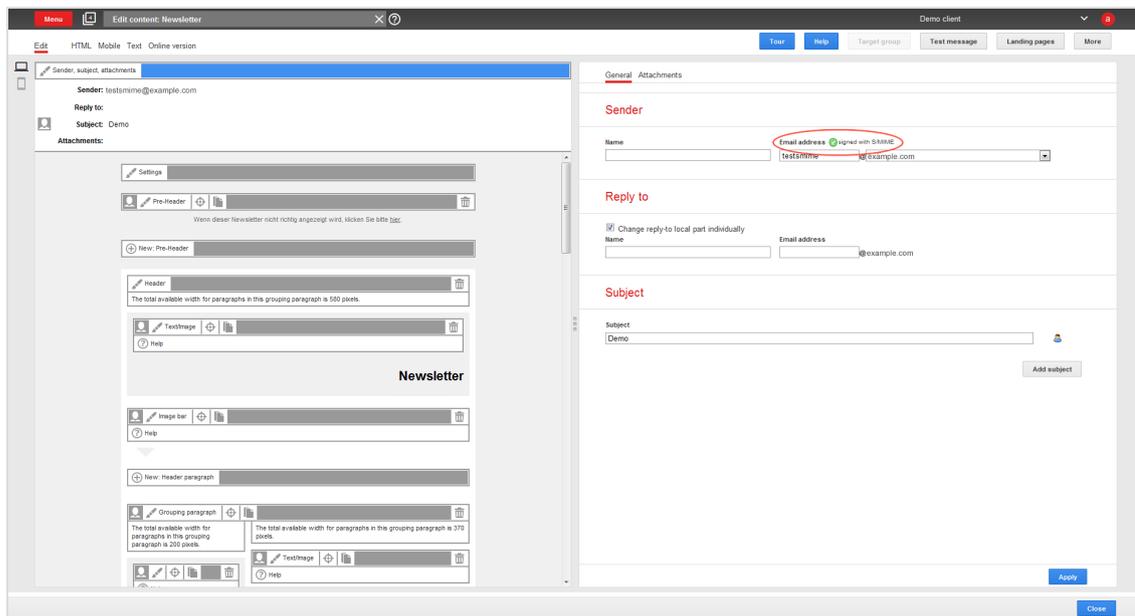
Deleting S/MIME certificates

To delete a S/MIME certificate, perform the following steps:

1. Open the start menu > **Administration** > **S/MIME certificates**. The **S/MIME certificates** window opens.
2. Select the S/MIME certificate you want to delete.
3. Click **Delete**. A confirmation window opens.
4. Click **Delete certificate**.

Mailings Classic

> **Note:** This feature is deprecated and its functions are part of <u>Smart Campaigns</u>.

> **Tip:** To migrate Mailings Classic mailings to Smart Campaigns and edit them there, follow these steps.

1. Open **start menu** > **Smart Campaigns**, select a Mailings Classic mailing from the list and click **Copy**. The selected mailing is duplicated and displayed as a campaign in the Smart Campaigns editing window.
2. Edit the campaign if necessary.
3. Click **Save and close**. The **Save campaign** dialog box opens.
4. Enter a new name if required.
5. Click **Save**.

The **Mailings** window shows mailings that were created with this client/account.

- **Status**. Indicates whether the mailing was sent, is being sent, or is still being worked on (status = new).
- **Start date**. Only filled in if a date is set for a mailing.
- **Type**. If your account is authorized to display the type, the corresponding column displays the specific type of each mailing. Types may be selected from the following:

  - **Regular**: Standard mailings.
  - **Special/API**. Mailings that are unique and activated using an interface (API) or an event. For example, a prepared mailing that every recipient receives once each year, such as on his or her birthday.
  - **Registration confirmation**. Prepared greeting mails are sent to new recipients.

○ **Templates**. Pre-configured mailings that contain sender information or content to simplify new mailing creation. Mailings of this type cannot be started.

Mailing action buttons

The buttons below the mailing list start one of these actions.

- **Create**. Create a new mailing and configure the mailing within a few steps. If your client is configured for different media types, you can create emails and short messages.
- **Duplicate**. Copy an existing mailing. The entry fields (subject, content, recipient list and so on) are filled with the same values as the source mailing.
- **Edit**. Change the values in a mailing, only if sending is not started.
- **Delete**. Delete a mailing that was not sent.
- **Start**. Start a mailing.
- **Abort sending**. Cancel the sending of a mailing.

> **Note:** You cannot restart an aborted mailing.

- **Split**: See [Sending a split mailing](#).
- **Preview**. Display a personalized preview of a mailing with the following steps:
  1. In the **Mailing** drop-down list, select a mailing.
  2. Click **Preview**.
  3. In the **Recipient list** drop-down list, select a recipient list then a recipient.
  4. Click **Show**.

Information area

The area in the below half of the screen offers information about your mailings. Select a mailing from the list above.

- **Details**. Displays data about the selected mailing, such as ID, name, creation date, sending date, recipient list(s) and target groups.
- **Report**: Displays the most important report data for the mailing. Until the mailing is started, fields are empty or zero.

> **Note:** Some fields show two values. The italic value indicates a unique value, such as a unique user action. If a recipient clicks one link several times, this counts as one unique click because the same recipient clicked the same link.

> If percentages for **Gross-…** are indicated, the value is related to the total number of recipients for a mailing. If the **Gross-…** prefix is not used, the value relates to the number of **Recipients w/o bounces**. The latter is the more practical count, because it refers to recipients who received the mailing and could react, either in the form of opens or clicks.

The following values are displayed in the summary:

> **Tip:** The following list is only a summary of the most important core indicators. More comprehensive reports can be found under **Reports**.

- **Recipients**. Number of recipients to whom Episerver Campaign attempted to send a mailing.
- **Recipients w/o bounces**. Number of recipients whose email addresses did not produce a bounce (message of non-deliverability).
- **Recipients skipped**. Number of recipients to whom the mailing could not be sent because their addresses were false.
- **Recipients in queue**. Only applies to mailings currently being sent. Number of recipients who were not sent a mailing.
- **Bounces**. Number of non-deliverability messages received by Episerver Campaign after a mailing.
- **Bounce rate**. Percentage of bounces.
- **… of which are hard bounces**. Percentage of hard bounces.
- **… of which are soft bounces**. Percentage of soft bounces.
- **Unique opens**. If a recipient opens a mailing several times, this option only counts them as one unique open.
- **Opens**. Number of opens.
- **Unique open rate**. Percentage of unique opens in relation to the number of recipients w/o bounces.
- **Open rate**. Percentage of opens in relation to the number of recipients w/o bounces.
- **Unique gross open rate**. Percentage of unique opens in relation to the number of recipients.
- **Gross open rate**. Percentage of opens by recipients.
- **Unique clicks**. Number of unique recipients that clicked an arbitrary link in a mailing. It does not matter how often and which link was clicked.
- **Clicks**. Number of clicks.
- **Unique click rate**. Percentage of unique clicks in relation to the number of recipients w/o bounces.
- **Click rate**. Percentage of clicks in relation to the number of recipients w/o bounces.
- **Unique gross click rate**. Percentage of unique clicks in relation to the total number of recipients.
- **Gross click rate**. Percentage of clicks of recipients.
- **Effective unique click rate**. Percentage of unique clicks in relation to the unique opens.
- **Unique unsubscribes**. Number of clicks on the unsubscribe link.

- **Unique unsubscribe rate**. Percentage of clicks on the unsubscribe link in relation to the number of recipients w/o bounces.
- **Unique gross unsubscribe rate**. Percentage of clicks on the unsubscribe link in relation to the total number of recipients.
- **Content preview**. Displays the mailing and its subject line.

Step 1. Name and description

> **Note:** This data is used internally by Episerver Campaign. It is not part of emails sent to mail recipients.

Enter a name to identify your mailings, such as "Customer Newsletter from May 23, 2018" or "Product Information for Ball Bearing 234/3 Rollout".

The **Description** field is optional. Content here shows up in the **Overview** menu item.

Select a mail format.

- **Text only**. Use for most personal emails. You cannot include images, colors, or bold text.
- **HTML only**. Use to mail in HTML. Be aware that recipients may receive unreadable emails if they have older email software that cannot display HTML.
- **Multipart**. Contains content in text and HTML formats. The HTML version is shown to most recipients. If the recipient's email software cannot display HTML, the text version is displayed.

> **Tip:** Some people prefer HTML mail because of additional features and information (images, color highlighting and so on), while others prefer text email to read without graphical distractions. Consider letting recipients choose between text and HTML format when subscribing to your newsletter, and save this information in your database.

Step 2. Recipients and sender

Recipients

You can select one or more recipient lists for mailing by enabling the associated check boxes. Episerver Campaign ensures that recipients on several lists only receive the mailing once.

You can select a target group to address a subset of a recipient list. Use target groups to guarantee that each test mailing is addressed to different recipients, and no recipient will receive two mailings. To do this:

1. Send the first test mailing.
2. Create a target group with the definition **Recipient did not receive [name of the first test mailing]**.
3. When sending the second mailing, select this target group.
4. When sending the mailing to the remainder of the list, continue in this manner.

In this case, the target group should be defined as **Recipient did not receive [name of the first test mailing] AND Recipient did not receive [name of the second test mailing]**.

To display the number of recipients, click **Calculate the number of possible recipients**.

Determining the order of recipients in a mailing

By default, recipients are addressed in the order in which they were entered into the list. To use a random selection of available recipients, select the **Random selection** check box.

Testing different versions of a mailing

1. In the **Maximum number of recipients** box, specify a number of recipients.
2. Copy the mailing.
3. Modify one or more parameters (subject, content, and so on).
4. Send that version to a different part of your list.
5. Compare results (clicks, openings, and so on).
6. Copy the mailing with the best performance to be sent to the remaining recipients.

Sender

You can specify which sender address should appear in the recipient's email software when your message is received.

- **Email address**. Enter the address section of the sender in this field. The domain section (behind the @) is fixed and cannot be changed.
- **Name**. This is typically your company name.

For example, `"Example Inc. [info@example.com]"`: `"Example Inc."` is the name and `"info@example.com"` is the email address.

> **Tip:** Be consistent in your sender address. Changing your email address or name may cause the recipient's email program to treat your mailings differently, and negatively impact your mailing's success.

Step 3. Subject and content

Editing content

Content management system (CMS), the Episerver template kit or HTML code: read about editing tools for your mailings in **Editing message content**.

Subject

Your mailing's subject line appears next to the sender address in the recipient's email program. The sender and subject most strongly influence a mailing's open rate.

You should limit the subject's length, such as 45-60 characters, because some email programs might cut off longer lines.

Content templates

The content of your mailing is created using content templates in Episerver Campaign. Use the **Free Text** template if you create your mailings externally (outside of Episerver Campaign), for example, through your agency or yourself using an HTML editor. This template lets you copy prepared text and HTML content directly.

However, if your mailings will have the same appearance (as is usually the case for newsletters), you can save time using specially-prepared content templates. The templates are designed to your specifications by Episerver. Or, you can use the **Template Kit**.

Using content templates, you can create the content of your mailing using predefined *modules*. When creating a new mailing, just enter the text and upload images. Episerver Campaign creates a completely formatted mailing. No knowledge of HTML is needed.

To use a template for your mailing, select it and click **Edit**.

> Tip: About templates
>
> See **Designing a newsletter** about email design using templates. Get tips and instructions for design and examples and suggestions from template developers.

Content attachments

To send attachments with a mailing, click the **Attachments** tab. If you have already sent mailings with attachments, the attachment files appear in the overview. To send one of these files as an attachment to the current

mailing, select the check box next to the file description.

To send a new file as an attachment, follow these steps.

1. Click **New**. The assistant for uploading attachment opens.
2. Select whether to upload a file from your computer, or a URL that links to a file. If you choose **Upload from hard drive**, a copy of the file is created in the Episerver Campaign server. If you choose **Use URL**, make sure that the file is available when the mailing is sent.
3. Click **Next**.
4. Click **Browse…** and select the file to be uploaded. If you link a file using a URL, enter the full URL.
5. Click **Next**.
6. Complete the **File name** and **Description** boxes. Episerver Campaign uses the name and description for internal management of the attachments, but not for the sending.
7. Click **Save** to make the file available as an attachment. After you upload or link the file, it appears in the list and can be sent as attachment for current and future mailings.

Note: Special characters in file names of attachments

Do not use an umlaut and ß in the file name. Some email clients remove special characters from the file name. Nevertheless, the recipients can still open and save the attachments. Only the name is changed.

Warning: Do not delete files from the list of attachments even if they only were attached to a single mailing. If you the file from the file server, it will no longer be available to recipients when they open the email.

Note: Send attachments in offline HTML mode

Attachments sent in this mode are loaded immediately upon receipt of the email. So, do not send large files in this mode, as this may delay the receipt of the email.

Due to a bug in the Apple email client, attachments sent in HTML offline mode do not appear in Apple Mail and on iPhones. If you send attachments in standard mode, there is no such problem.

Personalized Attachments

Use Personalized Attachments to send attachments to particular recipients. Before sending the email, you must transmit such attachments to Episerver Campaign using HTTP API. The uploaded attachments can be used when sending transaction emails. For example, you can send invoices and order confirmations to your recipients. See the **HTTP API** manual.

Character set

Use the drop-down list **Character set ("Encoding")** to select the character set to be used for encoding your mailing.

- **ISO-8859-1**. For recipients in German-speaking, Western European and North American countries.
- **ISO-8859-2**. For recipients in Central-South-Eastern Europe, for example in Poland, Croatia or Slovakia.
- **UTF-8**. Supports most special characters of all languages. Select this encoding if you are writing to recipients in other regions of the world, such as Eastern Europe or Turkey.

Step 4. Tracking

Specify settings that affect the measurement of important parameters, which determines the success of your mailings.

Opens

If you check the **Track opens** box, Episerver Campaign monitors how many recipients opened your mailing. This number is available in a report generated later.

When sending a mailing, Episerver Campaign inserts at the bottom of each email a reference as a 1×1 pixel, transparent graphic. This reference contains a unique ID for each recipient. When the recipient opens the email, the program loads the graphic from the Episerver server. Episerver Campaign then receives the recipient ID, so it can track that the user opened the email.

This measurement is only possible if the user opens an HTML mail (text mail does not support graphics) and is online at that time. So, you should perceive the rate of opens as relative, not absolute. If, for example, the open rate doubles from one mailing to the next, you probably selected an enticing subject line.

Clicks

If you check the **Enable link tracking** box, clicks on links in the mailing are recorded. This number can be retrieved in a subsequent report.

Episerver Campaign displays a list that includes links you used. In the **Occurrence** column, you can see how many times each link is used in the text or HTML section. The **Description** column better identifies the link in subsequent reports.

Because URLs can be long and cryptic, you can enter a clear label for each link here. To do that:

1. Mark the line you want to modify.
2. Click **Edit link**.

3. In the description field, enter the name for the linked page (such as Homepage, Order form and so on).
4. Click **Apply**.

The **HTML on** or **Text on** column lets you determine whether to record clicks for each link and content type (Text/HTML). Normally, it is useful to track each link in HTML email. But in plain text email, you may want to keep URLs clean and readable instead of transforming them into cryptic tracking links. For example, in "For information, click www.example.com," the link is more likely to be clicked than a tracking link consisting of symbols and numbers.

Click profiles

In the **Click profiles** column, you can assign a link to a click profile. To do so:

1. Select a link.
2. Click **Edit link**.
3. Click the **Profile** field.
4. In the **Assign click profile** window, select one or more profiles and click **OK**.

Rule-based click profiles are displayed without having them assigned to the respective link, because they are assigned automatically. You may add more profiles, though, to rule-based profiles.

Rule-based profiles cannot be removed from a link to which they are assigned. But, you can assign a link that does not match the rule to the profile based on the rule.

Step 5. Test email

Before sending any mailings, send a test mail. This topic explains the test lists configured for your account. Normally, there is one list of people who can receive a test mail (you, your co-workers, superiors and so on).

When you select a test list, its recipients are displayed below. To add a recipient, click **Add recipient**.

To send a test email, select recipients by checking the box and clicking either

- **Send email**. Sends a multi-part message
- **Send HTML version**. Sends a HTML message
- **Send text version**. Sends a text message

If the format is **Text** or **HTML**, you cannot send a multi-part test email. If your default format is **Multipart**, you should test all three options because your email client does not let you decide whether you want to receive a multi-part email as plain text or HTML.

Click **Test email to target group** to open a wizard that helps you send target group-based versions of your mailing, even if they do not match the target group criteria.

> **Tip:** If you use a personalized subject line, make sure that your test list contains the same fields used for personalization (for example, name). Otherwise, the test emails have the default subject line, because no personalization field is available to create a personalized subject line.

If you want to change the mailing after receiving test email, go back to **step 3**, change the content, then send a new test mail.

Step 6. Sending options

In the **Options** tab, select the mailing's sending time and speed. Furthermore, you can select a folder in which to save your mailing.

Whether you send your mailing now or later, it is saved in this step. If you select the option **Save mailing and start it at the following date and time** or **Save mailing and start it manually later**, you can edit your mailing until it is sent. But mailings that start immediately cannot be changed.

Saving mailing and starting it manually later

Use this option if you, for example, are waiting for a release for your mailing, or if you know that changes need to be made, or if the sending time is not determined. Any time after saving the mailing, you can use the **Overview** menu item to call up and change it.

Saving mailing and starting it at a later date and time

If your mailing is to be sent at a predetermined time, set the desired start date and time in this **Mailings** window field. To do so, click the arrow next to the current date. A calendar opens, from which you can select the mailing date and time. You can also change the mailing after it is saved (and before the specified starting time).

Saving mailing and delaying start after all split mailings are sent

This option lets you set a delay between the sending of last split mailing and the main mailing. It is helpful, for instance, to get reliable opens or click rates, because not all recipients open and click a mailing upon receiving it. The delay should be from a couple of hours to a couple of days.

Starting mailing immediately

Use this option if you tested your mailing and want to send it immediately. Be aware that the mailing starts immediately after clicking **Save**. Afterward, you cannot make corrections.

Saving mailing in a folder

To choose a folder in which you want to save your mailing, click the **Folder** field and select a folder. Alternatively, click the plus icon **+** in the status bar to create a new folder.

Setting the sending rate

Episerver Campaign sends up to 50 million emails per hour. In some cases, this is too fast. For example, you have a large mailing list, and the mailing encourages recipients to call a telephone number. Your call center could get overloaded. In such a case, set a maximum number of mails to send per hour. The minimum is 1,000 per hour.

If you leave the field blank, your mailing is sent at maximum speed.

Offline HTML

This option attaches images and style sheets directly to the email. This option may provide a better representation of your mailing in a recipient's email client, but may also result in a worse deliverability of your email.

Also, offline HTML may increase the price because the overall size of every email grows. In addition, open tracking is disabled (clicks are counted as opens anyway).

Managing content

The Episerver Campaign's content management system lets you create, edit and manage mailing content, and design interactive and personalized content.

- Edit mailing content. Use the integrated content editor.
- The Template Kit. Create and edit mailings with the mailing kit.
- Field functions. Script and use field functions.
- Coupon system. Create coupon blocks and embed coupons in mailings.
- Countdown timers. Create countdown timers and embed them in mailings.
- Click2Go. Create call-to-action buttons and embed them in mailings.
- Personalizing images. Create mailings with personalized images.
- Easy Copy. Copy mailing content.
- Mobile Fusion. Optimize mailings for mobile display.
- Attachments. Upload and edit attachments.
- Prefix or suffix subject line. Enable text to be automatically added to subject lines.
- Uploading files. Upload files manually.
- Updating mailing content prior to dispatch. Update content before dispatch via the content interface.
- Publish mailing. Copy mailings to other clients.
- Video emails. Embed videos in mailings.
- Designing a newsletter. Layout tips for newsletter design.

Editing mailing content

Whether you use the Episerver Template Kit or a custom template to edit your mailings, the integrated CMS **Easy edit** provides a comfortable and intuitive rich text editor that displays the mailing as it will look when sent. Editable content elements have a menu bar with buttons for editing, moving, copying and deleting.
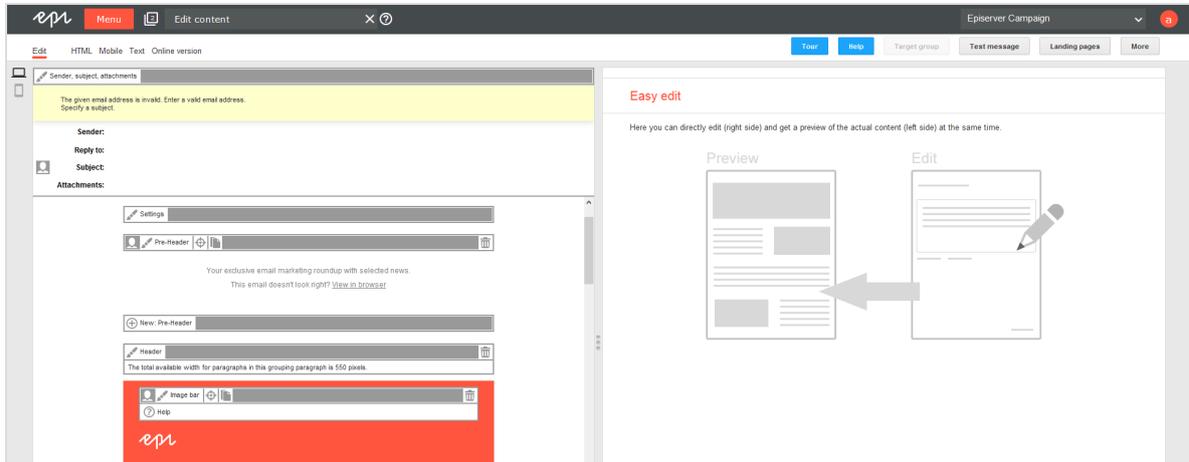
Depending on your template configuration, you might be able to, for example, edit some elements, but not move or delete them. In this case, the menu bar shows only the **Edit** button ✏️ .

> **Tip:** Click **Tour** next to the action buttons at the upper right edge of the editor window for an interactive tour of the Template Kit.

Paragraphs

On the left side, you can find a preview of your mailing template with its paragraphs (content elements). Paragraphs can contain various content types (text, images, banners, lists, and so on). In a template, content is included as a paragraph. You can add, import, edit, move, copy, and delete paragraphs.

Add

The **New: …** button appears wherever you can insert a new paragraph. Click it to insert one. Depending on the complexity of your template, you must select a sub-type of the inserted paragraph in the next step. Click **Save** to add the new element to your mailing.

Import

1. Click **New: …**.
2. Click **Import paragraph** and select the source.
3. In the **Source client** drop-down list, select a client. If you only use one client, it is already selected.
4. In the **Source content** drop-down list, select a message or message template and click **Next**. Importable paragraphs from the source are shown.

5. Check the boxes of paragraphs you want to import.
6. Click **Import paragraphs**.

Edit

To edit a paragraph click **Edit** . The edit area opens in a new layer on the right side.

You can edit texts by using the [rich text editor](#).

Paragraph types contain several tabs and input fields for entering content, setting the layout, and assigning target groups or click profiles. See [Template Kit](#).

Inline editing

Instead of using the [rich text editor](#), you can edit texts directly by clicking on the text below a paragraph. The editor toolbar with buttons for text formatting appears.
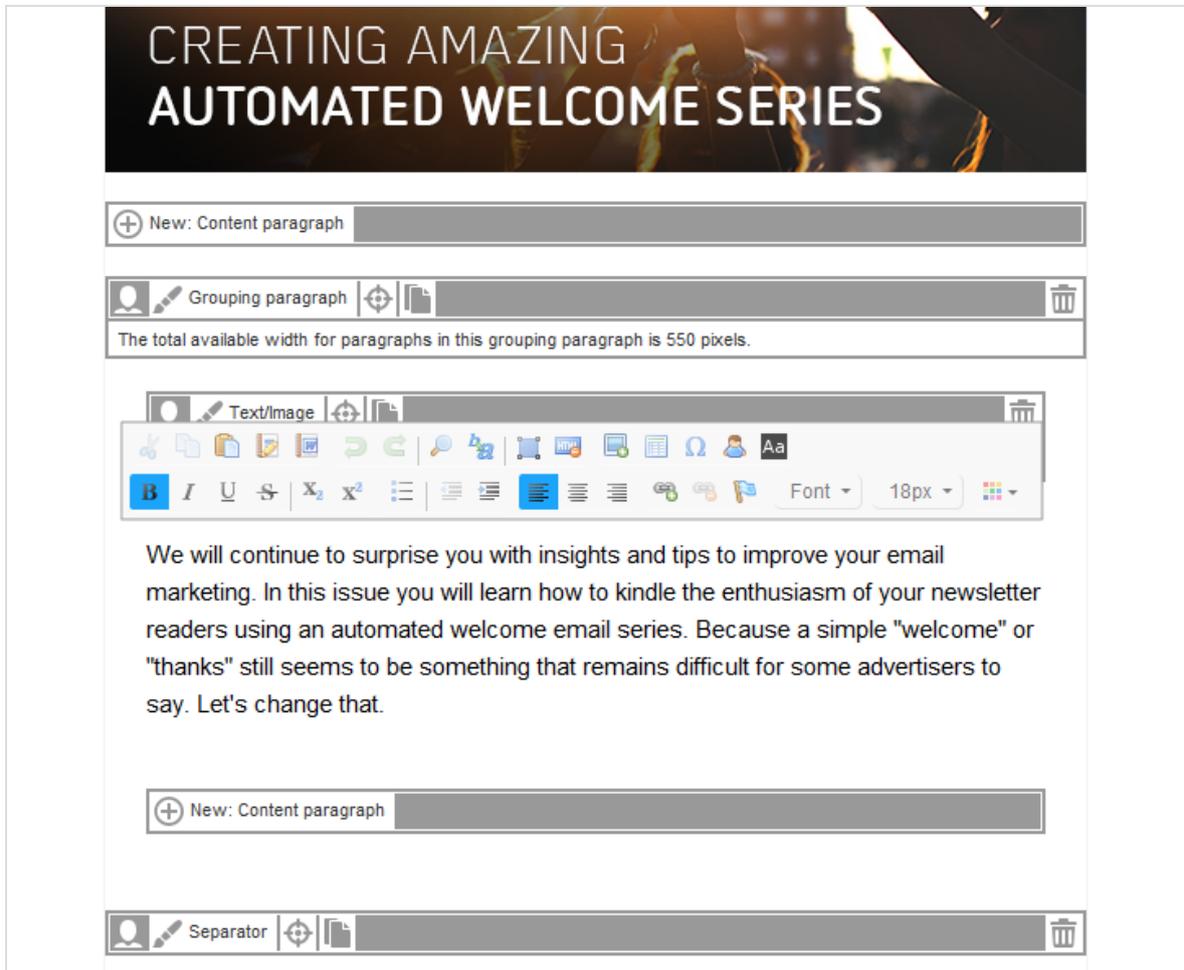
> **Tip:** The rich text editor has an additional **Source** button that lets you edit the text's HTML code.

Move

> **Note:** You can only add new paragraphs at the end of a content section (header, footer, paragraph group and so on).

To move a paragraph, click **Move** ⊕ and move the cursor where you want to insert it. When the message **Click here to move the selected paragraph above this paragraph** appears, click again.

> **Tip:** Some paragraphs cannot be moved everywhere, or can only be moved within a certain section.

Copy

To copy a paragraph, click **Copy**   then move the cursor to the position where you want to insert it. When the message **Click here to copy the selected paragraph above this paragraph** appears, click again to drop and insert the copied paragraph.

Delete

To delete a paragraph, click **Delete**   .

> **Tip:** Some paragraphs cannot be deleted.

Working with the rich text editor

For any text input (except headlines, subtitles or links), templates provide a rich text editor. The rich text editor opens in the right side configurations window when clicking on the name of a paragraph or when creating a new content paragraph with optional text.
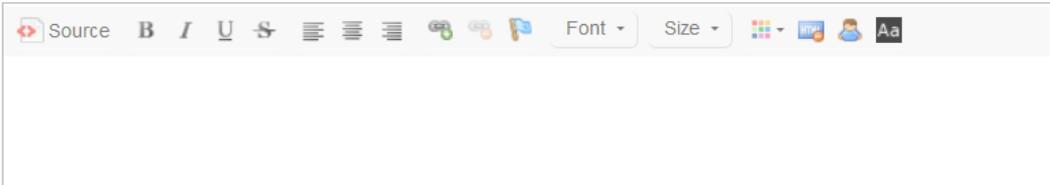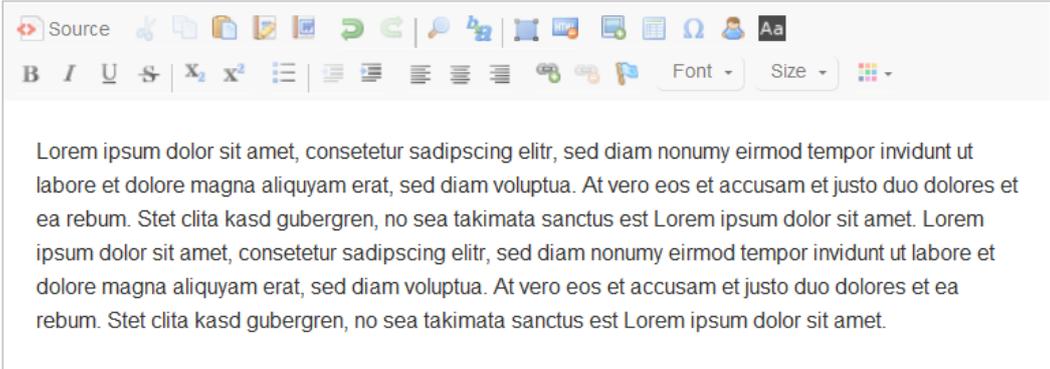
The editor toolbar has buttons for simple text formatting similar to those in text processing software.

Change the content and click **Apply**; a preview appears on the left side. You can change the view mode to HTML, mobile, text and online preview of the mailing.

Change background color

When working in the rich text editor with a white font or very light font, change the editor background color to make editing easier. Click **Change background color** Aa in the toolbar of the relevant text field. Click the button again to change the background back to white.

Field functions

In the editor toolbar, click **Insert field function** 👤 to insert a field function. [Field functions](#) can insert the content of a recipient list field, a personalization algorithm, or other personalized content.

> #### Tip: Personalized links
>
> You also can use field functions to create personalized links in your mailings. You can use field function placeholders in the domain part or path of a URL and in URL parameters. The link tracking of personalized links works as in regular links.

Images

You can insert images directly into the text field by clicking **Image** 🖼.

Some paragraph types also let you insert an image, either in the **General** tab or in **Image** tab. If an image can be inserted, you find a **Browse…** button and an **Alternative URL** field.

Images can either be uploaded from your computer or referenced via a URL. If you choose the latter option, make sure the image is available at the indicated server when the mailing is being sent. Otherwise, the sending cannot be done.

- Image files can be formatted as .jpg, .jpeg, .png or .gif.
- Images used in a mailing are automatically scaled to the size defined in the template. For the best image quality, however, you should resize images to fit before uploading them.

To delete an image, click **Delete** then **Save**.

Changing view

You can change the view mode of the mailing preview to **HTML**, **Mobile**, **Text** and **Online version**. To change the view mode, click one of the tabs at the top left.

- In **HTML** preview mode, menu bars and buttons are hidden, and you see the mailing as it will appear to recipients.
- The **Mobile** tab displays a preview of your newsletter on several mobile devices and with various display modes. See also: [Previewing on a mobile device](#).
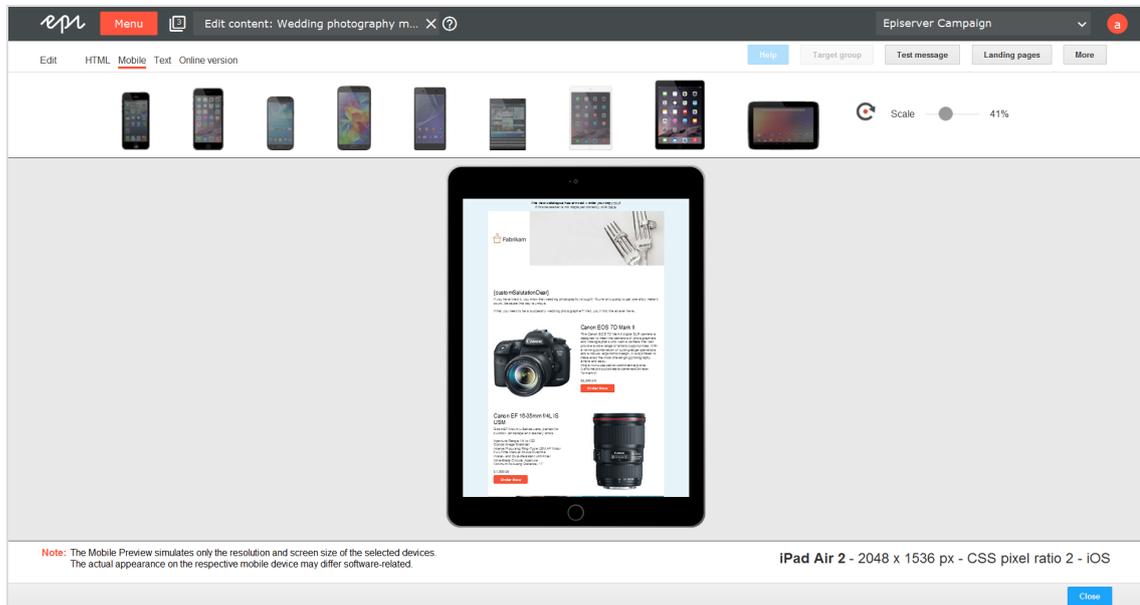
- The **Text** tab shows the text-only version of the mailing.
- The **Online version** tab shows the mailing as recipients will see it when they click the online version link on top.

Previewing on a mobile device

The **Mobile** tab lets you preview your mailing on mobile devices. If you use a template with **integrated mobile version/Mobile Fusion**, the optimized layout for each device is automatically shown. If you do not use a Mobile Fusion template, the HTML version appears and scales to fit the display of the selected mobile device.

> **Note:** The preview of a mailing serves only to test content and layout of the mobile version. The actual appearance on the devices may differ due to software versions and settings. To implement a preview for a mobile device not listed here, ask **customer support**.

To test different devices and display modes, perform the following steps:

1. In the list above the preview, click a mobile device. The mailing preview for this device is displayed.
2. Hover over the mailing preview; the arrow changes to a hand icon.
3. Click and move the mailing to scroll down and up in the preview.
4. Click **Rotate device** to switch between portrait and landscape mode.
5. Move the slider on the right to change the scale of the preview.

Action buttons

- **Target group**. Does not become active until at least one content element uses a target group. Click, select one or more target groups, and click **Submit selection** to see only content elements assigned to the selected target groups.
- **Landing pages**. Create a landing page from the mailing. The layout of landing pages is the same as for the mailing. You can edit landing pages the same way you can edit the associated mailing.

  To create a link to a landing page, in the **URL** box, enter the placeholder `{Landing page:n°}`. In this placeholder, substitute the **n°** element with the landing page number (for example, `{Landing page:1}`).

  To find out a landing page's number, click **Landing pages** to open a list of landing pages and their numbers.
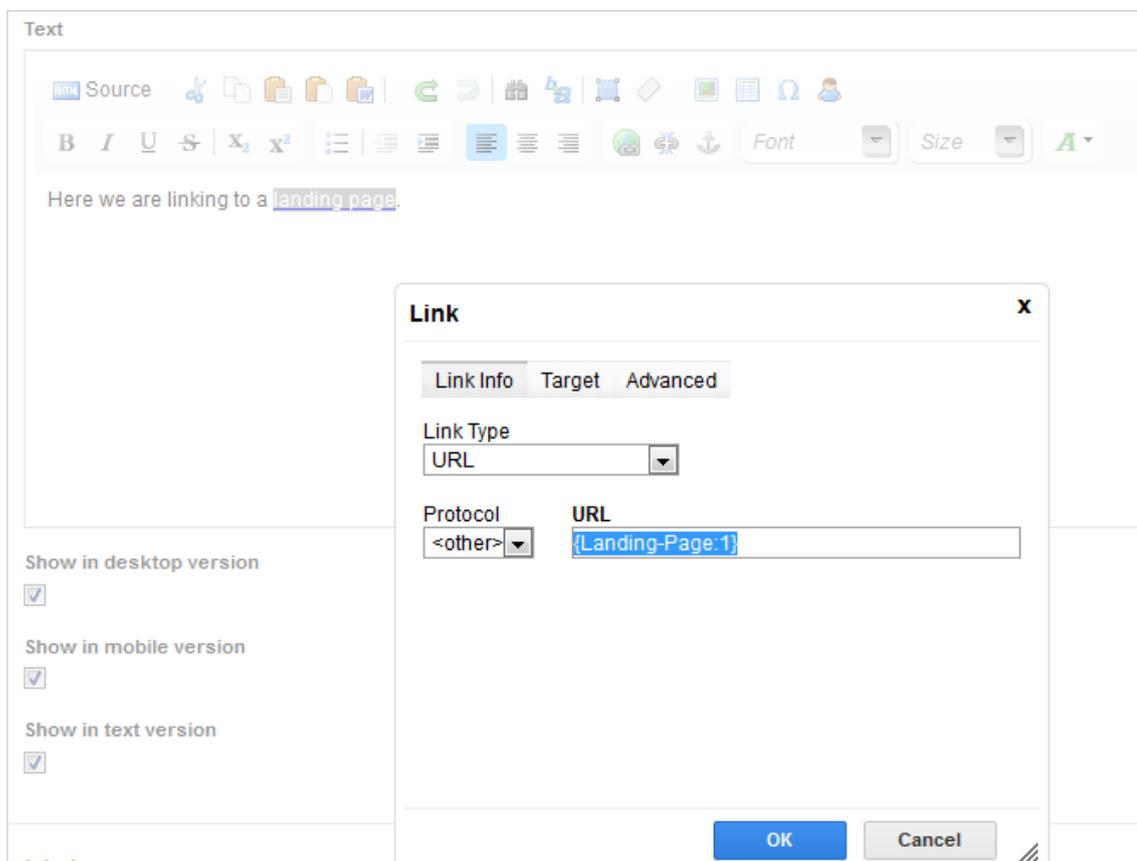
- **Test message**. Send a test message to check the appearance of the mailing before the actual dispatch. For a test email, do the following:

1. In the top toolbar in the editor, click **Test message**.
2. In the **Recipient list** drop-down list, select a test list.

> **Note:** Only use test lists and no real customer data. See also [Recipient lists](#).

3. If you want to simulate a target group, select a target group in the **Simulate target group** drop-down list.

> **Note:** The test recipients selected in the next step can also belong to other target groups.

4. In the **Recipients** drop-down list, select one or more recipients.

   To create a new test recipient, click **Create recipient** and enter the necessary recipient data. Then click **Submit**.

5. Click **Send email** to send the test messages in multi-part format, or click **Send HTML version** or **Send text version** if you want to test only one format.

> **Tip:** If you want to send a test message of type SMS or Mobile Push, see [Nodes and elements](#).

- **More**. Contains the menu items **Content Report**, **Print**, **HTML (PNG)**, **Retrieve RSS feeds** and [Edit directly](#).

> **Note:** The rich text editor cannot be used after the **Edit directly** option is enabled.

> **Tip:** Closing the editor window automatically saves changes.

Edit directly (HTML)

> **Warning:** If you activate the **Edit directly** mode, the original template cannot be edited afterwards. If you switch back from the **Edit directly** mode to the template editor, changes made in this mode are lost.

Instead of editing a template, you can edit the mailing's HTML source code. In the editor window's top toolbar, click the [action button](#) **More** > **Edit directly**. Now, edit the HTML source code or the text version of your mailing. Select the tab to edit the desired version. Before you save changes, select the **Activated** check box.

Editing tools

When editing HTML code, click **Format content**. The code is reformatted, inserting line breaks and indenting the tags.
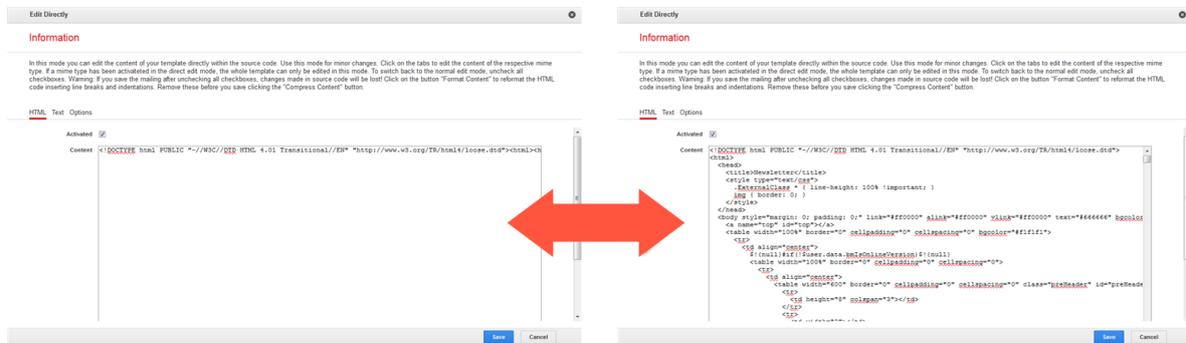
Before saving, click **Compress content** to remove the line breaks and indented tags. This removal ensures that velocity elements in the HTML code (for example, field functions) work correctly.

Template Kit

> **Note:** Mailings created with the Template Kit are displayed correctly by the most common email clients and web browsers. Episerver regularly checks compatibility, but individual email clients may cause display errors.

The generic Template Kit provides a flexible way to create newsletters. You can use it out-of-the box and with your corporate design style guide. Optionally, you can add **Mobile Fusion** to the Template Kit to optimize mailings for mobile devices

- Transferring design specifications into the Template Kit

  If your company works with design specifications, use the Template Kit to turn these directly into mailings with no special knowledge of graphic design or composition. Studies show that most design specifications can be mapped using the Template Kit. The layout of structural and content elements follows a logical pattern found in most newsletters. Episerver uses standard terminology for the individual elements, so you can work with the Template Kit whether you are a graphic designer, editor, or project manager.

- Content inherits basic settings

  When basic preferences (such as text, background colors, spacing, and so on) are set, they are applied to content matter. This provides a consistent layout without needing to set additional preferences for content elements. The principle of hierarchical acquisition guarantees a layout-compliant/CI-compliant newsletter without the need to define each parameter. But If you need a different layout, whether at a structural or a content level, you can design each element.

- Separation of structure and content

  When developing the Template Kit, Episerver implemented the systematic separation of structural and content elements. This feature provides the highest level of flexibility when designing newsletters.

- Configuration paragraphs for organizing your newsletter

  Configuration paragraphs greatly expand your design options. Each configuration paragraph functions like a section of the newsletter, which you supply with its own layout and content. Header and footer segments are also set up as configuration paragraphs.

- Flexible tables of contents

  The table of contents is the recipient's point-of-entry to your newsletter's content, and greatly impacts conversion rate. The Template Kit provides full control over the table of contents. Each configuration paragraph can have its own table of contents.

  - Single or two-column grids

    Episerver provides multiple column layouts. You can set column width, position and spacing. You can set the configuration paragraphs individually, whether they are part of a single or two column layout.

    If your mailing needs both layouts, be sure to use them efficiently and rationally. For example:

    - A two column editorial with a table of contents in a sidebar: Make the most important content visible immediately without having to scroll, and place it in a prominent position next to the editorial, where references can be made to them.
    - A single column product area: A sidebar is not needed in the product area. Use a single column layout to take maximum advantage of the newsletter's full width.

- Fully equipped and seamlessly integrated

  You can assign each element to a target group. You can also design pre-headers and newsletter headers and footers for specific target groups.

  - Click profiles

    The assignment of click profiles is integrated into the elements, so you can obtain valid data about recipient click behavior.

○ Sharing content via social networks

You control what content is shared (SWYN), and the layout of share buttons and redirection.

○ Create landing pages

You can create landing pages with a single click, edit them in the template editor, and link them to the desired location. Using the SWYN feature, landing pages are created and linked automatically.

○ Use pre-headers for a personalized approach

You can include a greeting, a special offer, or a keyword specifically tailored to a target group.

○ Integrate your favicon

Favicons are small icons, logos or symbols (such as your company logo) of 16×16 or 32×32 pixels. Typically, browsers display them in the address bar, on tabs, next to bookmarks, or in your history. You can integrate a favicon into the online version of your message with Episerver Campaign.

Designing a newsletter

Using templates, you can create mailings in a CI-compliant layout – with no graphics or HTML skills required. Templates offer you the flexibility you need by letting you design each element individually. And you do not have to worry about losing your overall layout, because templates store settings inherited from higher-level elements. Benefit: Text and mobile versions of your HTML mailings are generated automatically and can be edited subsequently.

> **Tip: Lacking inspiration? Episerver can create your newsletter for you.**
>
> Episerver can design your content template. On request, we can also implement your content template into Episerver Campaign. Contact customer support for more information.

Layout fundamentals

Each paragraph in a template and even the template itself provides a range of design options that can affect the layout of your newsletter:

- Background color of the newsletter and newsletter background
- Background color or images incorporated into individual paragraphs
- Width of the newsletter
- Number of columns
- Margins and spacing of individual paragraphs

Examples and comments

- **Pre-Header**. The pre-header contains a link to the online version. You can add pre-headers to display information prominently so that it is likely to catch the reader's eye.

- **Header**. The header contains an image and the newsletter's title. You can insert additional elements, such as date and issue. A graphics editor lets you incorporate elaborate text effects.
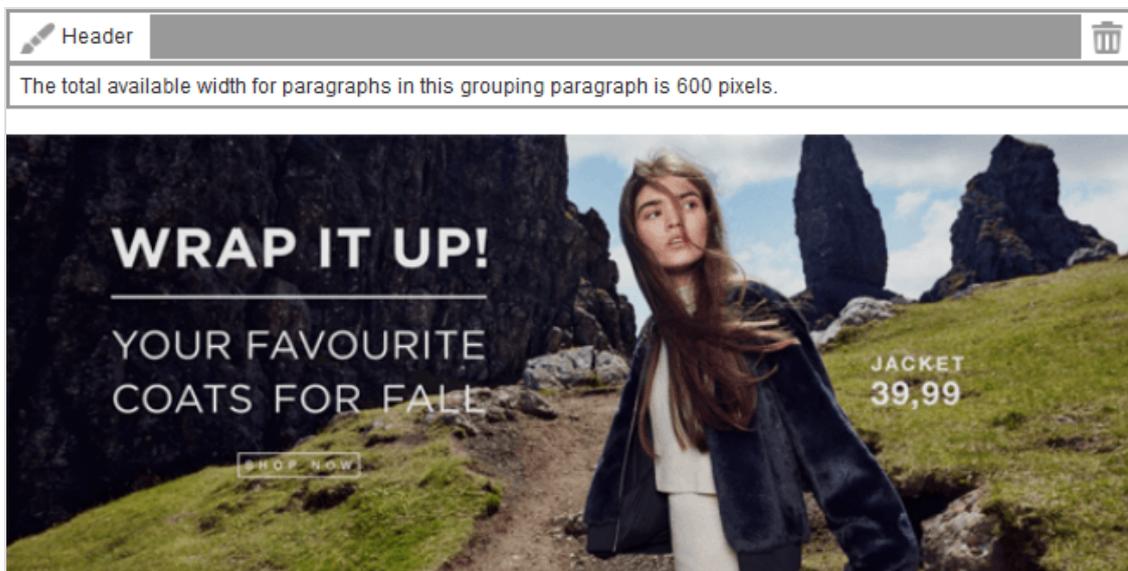
- **Sidebar**. The sidebar produces a two-column layout. In this example, the sidebar is given a different color to set it apart from the main body of the newsletter. If you choose this type of layout, set an inner margin to create a space between the box and the text. Similarly, set a margin between the sidebar and the main body of the newsletter so that the text/image block in the main body does not "cling" to the sidebar.

- **Main area**. The main area has the same color as the entire newsletter. The text/image paragraph runs across the total available width and does not require an inner margin. The image is centered between the title and the text. A teaser text links to a landing page.

- **Table of contents**. The table of contents is a separate type of paragraph and can be placed anywhere in the template. You can set a table of contents in a fixed position in individual mailing templates. You can enter the text that the table of contents displays into the individual paragraphs – or use the paragraph headings (standard).

- **Image position**. Here, the image is positioned on the left next to the heading. Larger images should be scaled down to 50 % of the available width. Images are positioned relative to text, link and heading. If you choose to position an image to the left below the heading, as opposed to the position shown here, then the heading will not be incorporated, which means it will appear across the full width of the paragraph.

- **Inline block**. Paragraphs with narrower widths are placed next to one another until the maximum width is filled. This way, you can create a layout with consecutive, variable columns. If the width is set to a particular portion of the total available width, then the individual blocks fill out the space precisely as indicated, generating a column layout.

- **Empty column**. In contrast to a single column layout, the sidebar is left blank, if no content is to be entered.

- **Single column**. With a single-column layout, a paragraph spans the entire width of the newsletter. To create a template with a variety of layouts (for example single-column or two-column), you will need to use paragraph outlines or special paragraphs.
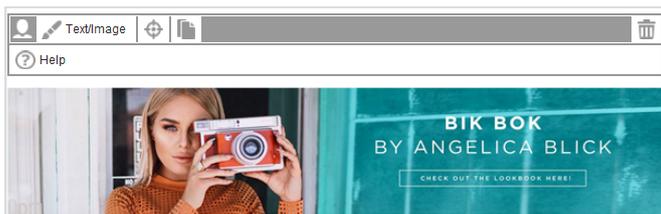
- **Background color**. A single background color (the same as used for the sidebar) is chosen for these paragraphs. Set an inner margin to add space between the text block and the paragraph frame.
- **Variable footer**. A footer can contain multiple paragraphs. You can treat footer paragraphs the same as content paragraphs.
- **Fixed footer**. This footer contains the site notice and contact information for the newsletter. This usually also includes the unsubscribe option required by law. The paragraph is permanently stored and normally does not need to be adapted or edited further.
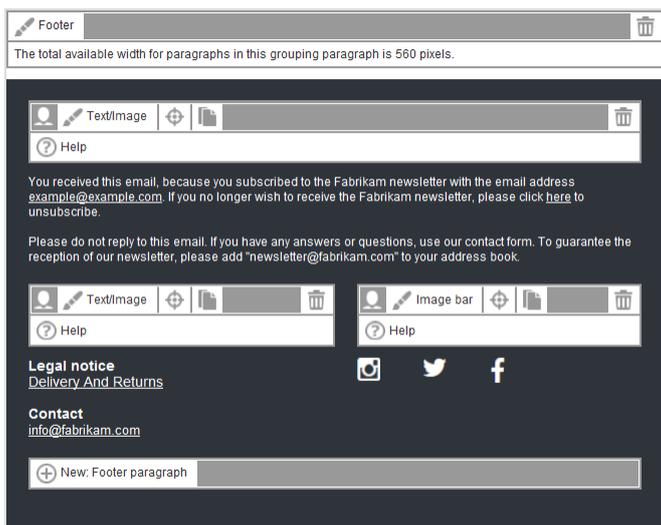
- **Newsletter width**. The ideal newsletter width depends on the recipient's device (responsive design):

  - **Desktop version**. 600 to 650 pixels.
  - **Mobile version**. 480 pixels (see Mobile Fusion).

Supported Fonts

The Template Kit supports the following fonts.

- Arial
- Comic Sans
- Courier New
- Georgia
- Lucinda Sans Unicode
- Tahoma
- Times New Roman
- Trebuchet MS
- Verdana

You can store other fonts as an image in the Template Kit. Texts used this way cannot be edited with the Template Kit.

> **Note:** Images in the mailing are visible only after loading.

Design options

You cannot display color and background gradients and shadowing, but you can round off edges. If you want to create the content template in Episerver Campaign yourself, do this in the relevant grouping paragraphs using the **Border** option.

Mobile Fusion

The Template Kit lets you preview your mailing on selected smart phones and tablets. So, you can check the vertical and horizontal mobile appearance of your newsletter.

Mobile content elements appear below one another, so a mobile reader does not have to scroll sideways, but can scroll up and down. And, you can specify whether images or text is shown first in content areas. You also have the option to show or hide content areas on the desktop versus the mobile version.

For more information, see Mobile Fusion.

General settings

Click **Settings** on the top border of the template editor to define fonts, basic grid, color schemes and other settings that affect the template. The assistant for these settings opens in a new layer with the tabs described in this topic.

General

These settings affect the general layout of the newsletter and content, unless you overwrite them in Content paragraphs. For example, use general settings to adapt your company's corporate design to this template.

Parameter	Description
Newsletter title	
Text	Appears in the browser window title of the online version.
Layout	
Width of the content area	Enter between 100 to 650 pixels to ensure that most email clients display the newsletter properly. If you set a greater value, test the newsletter with the deliverability preview.
Alignment	Set the alignment for the entire newsletter. But, you define the alignment of content elements in each content paragraph.
Margin	Specify up to 1/8 of the total newsletter width; larger margin distance negatively affects the layout.
Padding	Specify up to 1/8 of the total newsletter width to define space between borders and content (text or images). Padding is only effective if different background colors or images are defined for the newsletter and content elements.
Space between grouping paragraphs	If no other pixel value is set here, the **Padding** value is used.
Space between texts and images	Specify up to 20 pixels.

Parameter	Description
Favicon	
URL	If desired, enter the URL of an externally-stored favicon for the online version of your message.
Inherit	
Header	The inherit header value affects landing pages, including automatically generated ones. To enter content different from the newsletter header in the respective areas of your landing pages, clear this check box.
Footer	The inherit value affects landing pages, including automatically generated ones. To enter content different from the newsletter footer in the respective areas of your landing pages, clear this check box.

Font settings

Define font types, size and line height for headings, text and links.

Parameter	Description
Headings	
Font type	Define several font types in a comma-separated list. The browser or email client tries to use the first font in this list. If this font is not installed on the system, the next is tried. The last option should define a generic font.
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Size	Define the size (integer) of heading text.
Line height	You can set an integer value greater than the font size; the default integer value is set by recipient's web browser or email client.

Parameter	Description
Underline	Select to underline headings.
Bold	Select to bold headings.
Text	
Font type	Define several font types in a comma-separated list. The browser or email client tries to use the first font in this list. If this font is not installed on the system, the next is tried. The last option should define a generic font.
Color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Size	Define the size (integer) of the text.
Line height	You can set an integer value greater than the font size; the default integer value is set by recipient's web browser or email client.
Links	
Font type	Define several font types in a comma-separated list. The browser or email client tries to use the first font in this list. If this font is not installed on the system, the next is tried. The last option should define a generic font.
Color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Size	Define the size of link text.
Line height	You can set an integer value greater than the font size; the default integer value is set by the web browser or email client of the recipient.
Underline	Select to underline links.

Parameter	Description
Bold	Select to bold links.
Table of contents with links to paragraphs	
Font type	Define several font types in a comma-separated list. The browser or email client tries to use the first font in this list. If this font is not installed on the system, the next is tried. The last option should define a generic font.
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Size	Define the size of TOC links.
Line height	You can set an integer value greater than the font size; the default integer value is set by the web browser or email client of the recipient.
Underline	Select to underline TOC links.
Bold	Select to bold TOC links.
Menu items in the navigation menu	
Font type	Define several font types in a comma-separated list. The browser or email client tries to use the first font in this list. If this font is not installed on the system, the next is tried. The last option should define a generic font.
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser. If you leave the field blank, the color you specified in the **Links** area is displayed.
Size	Enter the font size for the menu item labels in pixels. If you leave the field blank, the font size you specified in the **Links** area will be used.
Line height	Enter the row height for the menu item labels in pixels. If you leave the field blank, the line height

Parameter	Description
	is automatically set by the email client of the recipient.
Underline	Select to underline menu items.
Bold	Select to bold menu items.

Custom fonts

On request, customer support sets up the custom fonts add-on. If you have configured custom fonts in your client, you can find an overview of the available fonts in the yellow box at the top of the edit area.

To use custom fonts, copy the font name in the desired input field in the **Font settings** tab. Additionally set alternative fonts.

Outlook fallbacks

Outlook does not support custom fonts. Define in the **Custom fonts** tab fallbacks to determine which alternative fonts Outlook can use. You can find an overview of the defined Outlook fallbacks in the yellow box at the top of the edit area.

Parameter	Description
Outlook fallbacks	
Headings	Set Outlook fallbacks for **Headings**.
Text	Set Outlook fallbacks for **Text**.
Links	Set Outlook fallbacks for **Links**.
Table of contents with links to paragraphs	Set Outlook fallbacks for **Table of contents with links to paragraphs**.
Menu items in the navigation menu	Set Outlook fallbacks for **Menu items in the navigation menu**.

Parameter	Description
Buttons	Set Outlook fallbacks for **Buttons**.

> **Note:** Outlook only uses the defined fallbacks (except for **Buttons**) if you have set a custom font in the corresponding area in the **Font settings** tab. If you set a custom font without defining a fallback, Outlook uses an alternative font.

Color settings

Define general background colors or images and border colors in this tab. You can overwrite these settings in each content block.

Parameter	Description
Newsletter background	
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser. If you leave the field blank, the color you specified in the **Links** area is displayed.
Image	Because email clients do not support the display of background images, they should not contain important information. If you use a background image, the parameters **Alignment** and **Repeat** become effective. Be aware that a background image is only visible at border areas and free spaces, being masked by content and other backgrounds.
Alignment	Only effective if a background image is uploaded. Sets alignment for the entire newsletter. Alignment of the content elements is defined in the content paragraphs.
Repeat	Only effective if a background image is uploaded. Repeats the background image.
Content area background	
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction

Parameter	Description
	of non-hex web colors may vary from the original, depending on the browser. If you leave the field blank, the color you specified in the **Links** area is displayed.
Border	
Show	Check to apply a border around the paragraph.
Border width	Enter an integer value in pixel. If you set this value to 0, no border will be displayed. The default border thickness is 1 pixel.
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser. If you leave the field blank, the color you specified in the **Links** area is displayed.
Layout	Specify whether the newsletter should be displayed with or without pre-header, header and footer.

Lists

Parameter	Description
Options	
List type	To use a simple bullet, under **List type**, select **Bullet list**. To use a custom bullet character, upload an image and, under **List type**, select **List with custom bullet character**.
Custom bullet character	Upload a bullet character or, in the **Alternatively external URL** field, enter an image URL pointing to the image source. The bullet character can be up to 30-pixels wide. Wider graphics are proportionally reduced to this size.

Separator

Use separator paragraphs to structure your newsletter and group paragraphs. Separators may contain a top link for a simple navigation, a separator line, the top link, an image, and free space. You can activate each elements individually in each separator paragraph.

Parameter	Description
Separator line	
Width	The maximum width equals the total newsletter width minus padding. If a top link icon with text is set on the separation line, the width of the line is reduced by the width of this element.
Alignment	The alignment parameter is only effective if the width is smaller than the total available width.
Border width	Enter an integer value in pixel.
Color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width of the separator	Set the width (in percent) of the separator line for the mobile version.
Top link	
Icon	You can replace the default icon with an uploaded custom icon. The maximum width equals the maximum width of the newsletter minus padding. Be aware that if you use wide graphics, the separator line, if used, is proportionally smaller. Graphics larger than the maximum width are scaled down.
Text	The text is shown. If the recipient's email client does not display the icon, the recipient sees only the text.

Parameter	Description
Text position	Select the position of the link text relative to the icon.
Position	Select the vertical position of the top link (text AND icon) relative to the separator line. By default, the top link is placed on the separator line.
Alignment	Select the horizontal position of the top link (text AND icon).
Image	
Image	Upload an image from your computer or enter an image URL in the **Alternatively external URL** field that points to the image file.
Alternative text	This text appears if a recipient blocks or disables images in his/her email client, or if the image cannot be displayed for another reason. You should enter an alternative text containing a short description of the image.
Link	You can link the image to a landing page or a page from your website. If you entered a text link in this paragraph, use the same link for the image.
Position	Specify the positioning of the image relative to the separator line and the top link. This positioning affects only the appearance if at least one or both of these elements are selected in a separator.
Alignment	Select the horizontal position of the image. If the image occupies the entire width, this parameter has no effect.
Spacing	
Above separator	You can optionally add this space later in each separator paragraph to improve the clarity of the newsletter.
Between top link and separator line	You can optionally add this space later in each separator paragraph to improve the clarity of the newsletter.

Parameter	Description
and/or icon	
Below separator	You can optionally add this space later in each separator paragraph to improve the clarity of the newsletter.

Button template

See Click2Go.

SWYN

If you use the share function for social networks (SWYN), define the general appearance of your newsletter's SWYN.

Parameter	Description
Introduction	
Text	Enter an introduction text that is shown together with the network icons. This text may contain a call-to-action for recipients to share content in their networks. Each paragraph for which the SWYN function is activated displays this text and the network icons.
Icons	
	Note: SWYN must be enabled for any icon in a paragraph for the icon to display. Maximum 30 pixels for all icons.
Facebook	Upload a custom Facebook icon or enter a URL pointing to your custom Facebook icon.
Twitter	Upload a custom Twitter icon or enter a URL pointing to your custom Twitter icon.
MySpace	Upload a custom MySpace icon or enter a URL pointing to your custom MySpace icon.

Parameter	Description
Xing	Upload a custom Xing icon or enter a URL pointing to your custom Xing icon.

Products

This paragraph type contains common fields to enter product details, such as old/current price, product category, description, and so on. You can define the order of these fields.

By default, no formatting is used in the designated fields. To format the text entered in these fields, use the editor's formatting tools. Or, if you use a content interface, commit HTML formatting tags.

Parameter	Description
Order	
Position 1	Enter a product name or title.
Position 2	Enter the product category, article group or genre. If you do not enter anything here, this position is not displayed.
Position 3	Enter an author, artist or manufacturer of the product or work. If you do not enter anything here, this position is not displayed.
Position 4	Enter a description of the product or work. If you do not enter anything here, this position is not displayed.
Position 5	Use this field in combination with the field **Current Price** for price reductions, bargains, special offers, and so on.
Position 6	Enter the current or new price here.

Content interface

This tab lets you define up to five alternative layouts for content of the content interface by freely inputting HTML or text. You can select the required layout from within the content interface paragraph.

Source text entered here is adopted into the newsletter with no additional checks.

Text and link formatting must be prepared in HTML format. You need HTML knowledge, particularly HTML in email, to create new layouts or edit the default one. Using corrupt or unsupported code may cause severe errors in the newsletter display.

Parameter	Description
Layout 1-5	
Desktop version	Enter the source text for the desktop version.
Mobile version	Enter the source text for the mobile version.
Text version	Enter the source text for the text version.

Inserting content

The following Velocity variables are available:

- **Status**. Information on current item paragraphs
- **Present**. For using queries that check for the presence of an element
- **Value**. For issuing the content

Notes for the creation of new layouts

- **Font definitions**. If you are using an alternative layout variant, font definitions must exist in the HTML you entered. The texts are not formatted by the Template Kit to give you complete freedom in visual design.
- **Widths**. Specify a fixed width or a width in percent. You should enter a percentage, because this prevents elements from sticking out of the layout.
- **Danger of display errors**. Note that you must have a good knowledge of HTML, as the HTML code you enter is not validated by Episerver Campaign. If you enter incorrect HTML code, serious display errors may occur.

Parameter	Default	Description
$first	Boolean	true if it is the first item in the content interface paragraph; otherwise false.
$index	Integer	The position of the item within the content interface paragraph as a number (1 for the first item, 2 for the second item...).
$last	Boolean	true if it is the last item in the content interface paragraph; otherwise false.

Variable	Type	Description
$text1Present	Boolean	true if content is present for the **Text 1** field; otherwise false.
$text2Present	Boolean	true if content is present for the **Text 2** field; otherwise false.
$text3Present	Boolean	true if content is present for the **Text 3** field; otherwise false.
$text4Present	Boolean	true if content is present for the **Text 4** field; otherwise false.
$text5Present	Boolean	true if content is present for the **Text 5** field; otherwise false.
$text6Present	Boolean	true if content is present for the **Text 6** field; otherwise false.
$text7Present	Boolean	true if content is present for the **Text 7** field; otherwise false.
$text8Present	Boolean	true if content is present for the **Text 8** field; otherwise false.
$text9Present	Boolean	true if content is present for the **Text 9** field; otherwise false.
$text10Present	Boolean	true if content is present for the **Text 10** field; otherwise false.
$link1TextPresent	Boolean	true if content is present for the **Text** field in the **Link 1** group; otherwise false.
$link1UrlPresent	Boolean	true if content is present for the **URL** field in the **Link 1** group; otherwise false.
$link2TextPresent	Boolean	true if content is present for the **Text** field in the **Link 2** group; otherwise false.
$link2UrlPresent	Boolean	true if content is present for the **URL** field in the **Link 2** group; otherwise false.
$link3TextPresent	Boolean	true if content is present for the **Text** field in the **Link 3** group; otherwise false.

Variable	Type	Description
$link2UrlPresent	Boolean	true if content is present for the URL field in the Link 3 group; otherwise false.
$image1ImageUrlPresent	Boolean	true if content is present for the Image field in the Image 1 group in the Images tab; otherwise false.
$image1AltTextPresent	Boolean	true if content is present for the Alternative text field in the Image 1 group in the Images tab; otherwise false.
$image1LinkPresent	Boolean	true if content is present for the Link field in the Image 1 group in the Images tab; otherwise false.
$image2ImageUrlPresent	Boolean	true if content is present for the Image field in the Image 2 group in the Images tab; otherwise false.
$image2AltTextPresent	Boolean	true if content is present for the Alternative text field in the Image 2 group in the Images tab; otherwise false.
$image2LinkPresent	Boolean	true if content is present for the Link field in the Image 2 group in the Images tab; otherwise false.
$image3ImageUrlPresent	Boolean	true if content is present for the Image field in the Image 3 group in the Images tab; otherwise false.
$image3AltTextPresent	Boolean	true if content is present for the Alternative text field in the Image 3 group in the Images tab; otherwise false.
$image3LinkPresent	Boolean	true if content is present for the Link field in the Image 3 group in the Images tab; otherwise false.
$image4ImageUrlPresent	Boolean	true if content is present for the Image field in the Image 4 group in the Images tab; otherwise false.
$image4AltTextPresent	Boolean	true if content is present for the Alternative text field in the Image

Variable	Type	Description
		4 group in the **Images** tab; otherwise *false*.
$image4LinkPresent	Boolean	*true* if content is present for the **Link** field in the **Image 4** group in the **Images** tab; otherwise *false*.
$image5ImageUrlPresent	Boolean	*true* if content is present for the **Image** field in the **Image 5** group in the **Images** tab; otherwise *false*.
$image5AltTextPresent	Boolean	*true* if content is present for the **Alternative text** field in the **Image 5** group in the **Images** tab; otherwise *false*.
$image5LinkPresent	Boolean	*true* if content is present for the **Link** field in the **Image 5** group in the **Images** tab; otherwise *false*.
$image6ImageUrlPresent	Boolean	*true* if content is present for the **Image** field in the **Image 6** group in the **Images** tab; otherwise *false*.
$image6AltTextPresent	Boolean	*true* if content is present for the **Alternative text** field in the **Image 6** group in the **Images** tab; otherwise *false*.
$image6LinkPresent	Boolean	*true* if content is present for the **Link** field in the **Image 6** group in the **Images** tab; otherwise *false*.

Variable	Type	Environment	Description
$text1Value	String	Desktop, mobile, text	The unchanged content from the **Text 1** field.
$text1FormattedValue	String	Desktop, mobile	The edited content from the **Text 1** field.
$text1FormattedAsHeadlineValue	String	Desktop, mobile	The edited content from the **Text 1** field. The text is provided in the formatting for headings, and is linked to the

Variable	Type	Environment	Description
			URL for **Link 1**.
$text2Value	String	Desktop, mobile, text	The unchanged content from the **Text 2** field.
$text2FormattedValue	String	Desktop, mobile	The edited content from the **Text 2** field.
$text3Value	String	Desktop, mobile, text	The unchanged content from the **Text 3** field.
$text3FormattedValue	String	Desktop, mobile	The edited content from the **Text 3** field.
$text4Value	String	Desktop, mobile, text	The unchanged content from the **Text 4** field.
$text4FormattedValue	String	Desktop, mobile	The edited content from the **Text 4** field.
$text5Value	String	Desktop, mobile, text	The unchanged content from the **Text 5** field.
$text5FormattedValue	String	Desktop, mobile	The edited content from the **Text 5** field.
$text6Value	String	Desktop, mobile, text	The unchanged content from the **Text 6** field.
$text6FormattedValue	String	Desktop, mobile	The edited content from the **Text 6** field.
$text7Value	String	Desktop, mobile, text	The unchanged content from the **Text 7** field.

Variable	Type	Environment	Description
$text7FormattedValue	String	Desktop, mobile	The edited content from the **Text 7** field.
$text8Value	String	Desktop, mobile, text	The unchanged content from the **Text 8** field.
$text8FormattedValue	String	Desktop, mobile	The edited content from the **Text 8** field.
$text9Value	String	Desktop, mobile, text	The unchanged content from the **Text 9** field.
$text9FormattedValue	String	Desktop, mobile	The edited content from the **Text 9** field.
$text10Value	String	Desktop, mobile, text	The unchanged content from the **Text 10** field.
$text10FormattedValue	String	Desktop, mobile	The edited content from the **Text 10** field.
$link1TextValue	String	Desktop, mobile, text	The unchanged content from the **Text** field in the **Link 1** group.
$link1UrlValue	String	Desktop, mobile, text	The unchanged content from the **URL** field in the **Link 1** group.
$link1FormattedValue	String	Desktop, mobile	The edited content from the **Text** field in the **Link 1** group. The text is provided in the formatting for links, and is linked to the URL for **Link 1**.
$link2TextValue	String	Desktop, mobile, text	The unchanged content from the **Text** field in the **Link 2** group.

Variable	Type	Environment	Description
$link2UrlValue	String	Desktop, mobile, text	The unchanged content from the **URL** field in the **Link 2** group.
$link2FormattedValue	String	Desktop, mobile	The edited content from the **Text** field in the **Link 2** group. The text is provided in the formatting for links, and is linked to the URL for **Link 2**.
$link3TextValue	String	Desktop, mobile, text	The unchanged content from the **Text** field in the **Link 3** group.
$link3UrlValue	String	Desktop, mobile, text	The unchanged content from the **URL** field in the **Link 3** group.
$link3FormattedValue	String	Desktop, mobile	The edited content from the **Text** field in the **Link 3** group. The text is provided in the formatting for links, and is linked to the URL for **Link 3**.
$image1ImageUrlValue	String	Desktop, mobile	The image address of **Image 1**.
$image1AltTextValue	String	Desktop, mobile, text	The unchanged content from the **Alternative text** field in the **Image 1** group.
$image1LinkValue	String	Desktop, mobile, text	The unchanged content from the **Link** field in the **Image 1** group.
$image1FormattedValue	String	Mobile	The complete HTML source text from **Image 1** with alternative text and link. The image width is set to 100% (available width).

Variable	Type	Environment	Description
$image1FullFormattedValue	String	Desktop	The complete HTML source text from **Image 1** with alternative text and link. The maximum image width is the available paragraph width.
$image1HalfFormattedValue	String	Desktop	The complete HTML source text from **Image 1** with alternative text and link. The maximum image width is half of the available paragraph width.
$image2ImageUrlValue	String	Desktop, mobile	The image address of **Image 2**.
$image2AltTextValue	String	Desktop, mobile, text	The unchanged content from the **Alternative text** field in the **Image 2** group.
$image2LinkValue	String	Desktop, mobile, text	The unchanged content from the **Link** field in the **Image 2** group.
$image2FormattedValue	String	Mobile	The complete HTML source text from **Image 2** with alternative text and link. The image width is set to 100% (available width).
$image2FullFormattedValue	String	Desktop	The complete HTML source text from **Image 2** with alternative text and link. The maximum image width is the available paragraph width.
$image2HalfFormattedValue	String	Desktop	The complete HTML source text from **Image 2** with alternative text and link. The maximum image width is half of the available paragraph width.

Variable	Type	Environment	Description
$image3ImageUrlValue	String	Desktop, mobile	The image address of **Image 3**.
$image3AltTextValue	String	Desktop, mobile, text	The unchanged content from the **Alternative text** field in the **Image 3** group.
$image3LinkValue	String	Desktop, mobile, text	The unchanged content from the **Link** field in the **Image 3** group.
$image3FormattedValue	String	Mobile	The complete HTML source text from **Image 3** with alternative text and link. The image width is set to 100% (available width).
$image3FullFormattedValue	String	Desktop	The complete HTML source text from **Image 3** with alternative text and link. The maximum image width is the available paragraph width.
$image3HalfFormattedValue	String	Desktop	The complete HTML source text from **Image 3** with alternative text and link. The maximum image width is half of the available paragraph width.
$image4ImageUrlValue	String	Desktop, mobile	The image address of **Image 4**.
$image4AltTextValue	String	Desktop, mobile, text	The unchanged content from the **Alternative text** field in the **Image 4** group.
$image4LinkValue	String	Desktop, mobile, text	The unchanged content from the **Link** field in the **Image 4** group.

Variable	Type	Environment	Description
$image4FormattedValue	String	Mobile	The complete HTML source text from **Image 4** with alternative text and link. The image width is set to 100% (available width).
$image4FullFormattedValue	String	Desktop	The complete HTML source text from **Image 4** with alternative text and link. The maximum image width is the available paragraph width.
$image4HalfFormattedValue	String	Desktop	The complete HTML source text from **Image 4** with alternative text and link. The maximum image width is half of the available paragraph width.
$image5ImageUrlValue	String	Desktop, mobile	The image address of **Image 5**.
$image5AltTextValue	String	Desktop, mobile, text	The unchanged content from the **Alternative text** field in the **Image 5** group.
$image5LinkValue	String	Desktop, mobile, text	The unchanged content from the **Link** field in the **Image 5** group.
$image5FormattedValue	String	Mobile	The complete HTML source text from **Image 5** with alternative text and link. The image width is set to 100% (available width).
$image5FullFormattedValue	String	Desktop	The complete HTML source text from **Image 5** with alternative text and link. The maximum image width is the available paragraph width.

Variable	Type	Environment	Description
$image5HalfFormattedValue	String	Desktop	The complete HTML source text from **Image 5** with alternative text and link. The maximum image width is half of the available paragraph width.
$image6ImageUrlValue	String	Desktop, mobile	The image address of **Image 6**.
$image6AltTextValue	String	Desktop, mobile, text	The unchanged content from the **Alternative text** field in the **Image 6** group.
$image6LinkValue	String	Desktop, mobile, text	The unchanged content from the **Link** field in the **Image 6** group.
$image6FormattedValue	String	Mobile	The complete HTML source text from **Image 6** with alternative text and link. The image width is set to 100% (available width).
$image6FullFormattedValue	String	Desktop	The complete HTML source text from **Image 6** with alternative text and link. The maximum image width is the available paragraph width.
$image6HalfFormattedValue	String	Desktop	The complete HTML source text from **Image 6** with alternative text and link. The maximum image width is half of the available paragraph width.
$editBar	String	Desktop, mobile	Inserts the paragraph button bar. This is required to integrate the button bar into the table, such as when implementing adjacent items. If this variable is

Variable	Type	Environment	Description
			not available, the button bar is placed above the item.

Examples of alternative layout variants

The examples show the source text for the standard layout and can be adapted for alternative layout variants.

Remove HTML comments, blank lines and spaces when transferring HTML into the Template Kit. If you do not do this, then these elements are included when sending, and will cause the newsletter source text to "swell".

```
<table width="100%" border="0" cellpadding="0" cellspacing="0">
    <tr>
        <td width="100%">
            #set($displaySeparator = false)
            #if("$text1Present" == "true")
                $text1FormattedAsHeadlineValue
                #set($displaySeparator = true)
            #end

            #if("$image1ImageUrlPresent" == "true")
                #if("$text1Present" == "true")
                    <table width="10" border="0" cellpadding="0" cellspacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
                    #set($displaySeparator = false)
                #end
                <table border="0" cellspacing="0" cellpadding="0" align="right">
                    <tr>
                        <td width="10"></td>
                        <td>
                            #if("$image1LinkPresent" != "true" && "$link1UrlPresent" == "true")
                                <a href="$link1UrlValue" target="_blank">
                            #end
                            $image1HalfFormattedValue
                            #if("$image1LinkPresent" != "true" && "$link1UrlPresent" == "true")
                                </a>
                            #end
                        </td>
                    </tr>
                </table>
            #end

            #if("$text2Present" == "true")
                #if($displaySeparator)
                    <table width="10" border="0" cellpadding="0" cellspacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
                #end
                $text2FormattedValue
                #set($displaySeparator = true)
```

```
        #end

        #if("$text3Present" == "true")
            #if($displaySeparator)
                <table width="10" border="0" cellpadding="0" cellspacing="0">
                    <tr>
                        <td width="10" height="10"></td>
                    </tr>
                </table>
            #end
            $text3FormattedValue
            #set($displaySeparator = true)
        #end

        #if("$text4Present" == "true")
            #if($displaySeparator)
                <table width="10" border="0" cellpadding="0" cellspacing="0">
                    <tr>
                        <td width="10" height="10"></td>
                    </tr>
                </table>
            #end
            $text4FormattedValue
            #set($displaySeparator = true)
        #end

        #if("$text5Present" == "true")
            #if($displaySeparator)
                <table width="10" border="0" cellpadding="0" cellspacing="0">
                    <tr>
                        <td width="10" height="10"></td>
                    </tr>
                </table>
            #end
            $text5FormattedValue
            #set($displaySeparator = true)
        #end

        #if("$text6Present" == "true")
            #if($displaySeparator)
                <table width="10" border="0" cellpadding="0" cellspacing="0">
                    <tr>
                        <td width="10" height="10"></td>
                    </tr>
                </table>
            #end
            $text6FormattedValue
            #set($displaySeparator = true)
        #end

        #if("$text7Present" == "true")
            #if($displaySeparator)
                <table width="10" border="0" cellpadding="0" cellspacing="0">
                    <tr>
                        <td width="10" height="10"></td>
                    </tr>
                </table>
            #end
            $text7FormattedValue
            #set($displaySeparator = true)
        #end

        #if("$text8Present" == "true")
```

```
     #if($displaySeparator)
         <table width="10" border="0" cellpadding="0" cellspacing="0">
             <tr>
                 <td width="10" height="10"></td>
             </tr>
         </table>
     #end
     $text8FormattedValue
     #set($displaySeparator = true)
#end

#if("$text9Present" == "true")
     #if($displaySeparator)
         <table width="10" border="0" cellpadding="0" cellspacing="0">
             <tr>
                 <td width="10" height="10"></td>
             </tr>
         </table>
     #end
     $text9FormattedValue
     #set($displaySeparator = true)
#end

#if("$text10Present" == "true")
     #if($displaySeparator)
         <table width="10" border="0" cellpadding="0" cellspacing="0">
             <tr>
                 <td width="10" height="10"></td>
             </tr>
         </table>
     #end
     $text10FormattedValue
     #set($displaySeparator = true)
#end

#if("$link1TextPresent" == "true" && "$link1UrlPresent" == "true")
     #if($displaySeparator)
         <table width="10" border="0" cellpadding="0" cellspacing="0">
             <tr>
                 <td width="10" height="10"></td>
             </tr>
         </table>
     #end
     $link1FormattedValue
     #set($displaySeparator = true)
#end

#if("$link2TextPresent" == "true" && "$link2UrlPresent" == "true")
     #if($displaySeparator)
         <table width="10" border="0" cellpadding="0" cellspacing="0">
             <tr>
                 <td width="10" height="10"></td>
             </tr>
         </table>
     #end
     $link2FormattedValue
     #set($displaySeparator = true)
#end

#if("$link3TextPresent" == "true" && "$link3UrlPresent" == "true")
     #if($displaySeparator)
         <table width="10" border="0" cellpadding="0" cellspacing="0">
             <tr>
```

```
                                <td width="10" height="10"></td>
                        </tr>
                    </table>
                #end
                $link3FormattedValue
                #set($displaySeparator = true)
            #end
        </td>
    </tr>
    <tr>
        <td width="100%" height="10"><!-- --></td>
    </tr>
</table>
```

```
#set($displaySeparator = false)
#if("$text1Present" == "true")
    $text1FormattedAsHeadlineValue
    #set($displaySeparator = true)
#end
#if("$image1ImageUrlPresent" == "true")
    #if("$text1Present" == "true")
        <div style="height: 10px;"></div>
        #set($displaySeparator = false)
    #end
    <div style="float: right; margin-left: 10px; max-width: 50%;">
        #if("$image1LinkPresent" != "true" && "$link1UrlPresent" == "true")
            <a href="$link1UrlValue" target="_blank">
        #end
        $image1FormattedValue
        #if("$image1LinkPresent" != "true" && "$link1UrlPresent" == "true")
            </a>
        #end
    </div>
#end
#if("$text2Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text2FormattedValue
    #set($displaySeparator = true)
#end
#if("$text3Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text3FormattedValue
    #set($displaySeparator = true)
#end
#if("$text4Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text4FormattedValue
    #set($displaySeparator = true)
#end
#if("$text5Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text5FormattedValue
    #set($displaySeparator = true)
#end
```

```
#if("$text6Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text6FormattedValue
    #set($displaySeparator = true)
#end
#if("$text7Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text7FormattedValue
    #set($displaySeparator = true)
#end
#if("$text8Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text8FormattedValue
    #set($displaySeparator = true)
#end
#if("$text9Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text9FormattedValue
    #set($displaySeparator = true)
#end
#if("$text10Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text10FormattedValue
    #set($displaySeparator = true)
#end
#if("$link1TextPresent" == "true" && "$link1UrlPresent" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $link1FormattedValue
    #set($displaySeparator = true)
#end
#if("$link2TextPresent" == "true" && "$link2UrlPresent" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $link2FormattedValue
    #set($displaySeparator = true)
#end
#if("$link3TextPresent" == "true" && "$link3UrlPresent" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $link3FormattedValue
    #set($displaySeparator = true)
#end
<div style="clear: both; height: 10px;"><!-- --></div>
```

```
#set($displaySeparator = false)#if("$text1Present" == "true")#if($displaySeparator)
#end$!{null}$text1Value#set($displaySeparator = true)#end$!{null}#if("$text2Present" ==
"true")#if($displaySeparator)
#end$!{null}$text2Value#set($displaySeparator = true)#end$!{null}#if("$text3Present" ==
```

```
"true")#if($displaySeparator)
#end$!{null}$text3Value#set($displaySeparator = true)#end$!{null}#if("$text4Present" ==
"true")#if($displaySeparator)
#end$!{null}$text4Value#set($displaySeparator = true)#end$!{null}#if("$text5Present" ==
"true")#if($displaySeparator)
#end$!{null}$text5Value#set($displaySeparator = true)#end$!{null}#if("$text6Present" ==
"true")#if($displaySeparator)
#end$!{null}$text6Value#set($displaySeparator = true)#end$!{null}#if("$text7Present" ==
"true")#if($displaySeparator)
#end$!{null}$text7Value#set($displaySeparator = true)#end$!{null}#if("$text8Present" ==
"true")#if($displaySeparator)
#end$!{null}$text8Value#set($displaySeparator = true)#end$!{null}#if("$text9Present" ==
"true")#if($displaySeparator)
#end$!{null}$text9Value#set($displaySeparator = true)#end$!{null}#if("$text10Present" ==
"true")#if($displaySeparator)
#end$!{null}$text10Value#set($displaySeparator = true)#end$!{null}#if("$link1TextPresent" ==
"true" && "$link1UrlPresent" == "true")#if($displaySeparator)
#end$!{null}$link1TextValue
$link1UrlValue#set($displaySeparator = true)#end$!{null}#if("$link2TextPresent" == "true" &&
"$link2UrlPresent" == "true")#if($displaySeparator)
#end$!{null}$link2TextValue
$link2UrlValue#set($displaySeparator = true)#end$!{null}#if("$link3TextPresent" == "true" &&
"$link3UrlPresent" == "true")#if($displaySeparator)
#end$!{null}$link3TextValue
$link3UrlValue#set($displaySeparator = true)#end$!{null}#if("$image1ImageUrlPresent" == "true"
&& "$image1AltTextPresent" == "true"
    && ("$image1LinkPresent" == "true" || "$link1UrlPresent" == "true"))#if($displaySeparator)
#end$!{null}$image1AltTextValue
#if("$image1LinkPresent" == "true")$image1LinkValue$!{null}#else$!{null}$link1UrlValue#end#end$!
{null}
```

RSS feeds

You can define one or more layout variants for RSS feed articles. Within the RSS feed paragraph you can select the layout to be used.

Source code entered in this tab is rendered into the newsletter without further checking. The formatting of text and links must be written in HTML code.

Warning: You need knowledge of HTML and particularly of HTML in emails to setup this paragraph. Using corrupt or not supported code in a layout may cause severe errors in the newsletter display.

Parameter	Description
Placeholder for the RSS feed URL	
Value for {placeholder1}...Value for {placeholder1}	In the RSS feed paragraph, open the **RSS feed** tab and insert the placeholder {placeholder1}, {placeholder3} or {placeholder3} in the **URL** box. Before the RSS feed is retrieved, this placeholder is replaced with the value entered here.

Parameter	Description
Order (standard layout)	
Position 1	Select the content to be displayed here.
Position 2	Select the content to be displayed here.
Position 3	Select the content to be displayed here.
Position 4	Select the content to be displayed here.
Layout 1-5	
Desktop version	Enter the source code for the desktop version of your newsletter.
Mobile version	Enter the source code for the mobile version of your newsletter.
Text version	Enter the source code for the text version of your newsletter.

Inserting content

Content from an RSS feed is present as velocity variables and can be inserted in the source text this way. These include

- status variables (information on current article paragraphs)
- present variables (for using queries that check the presence of an element)
- value variables (for releasing content)

Note: Important notes

- **Font definitions**. When using alternate layout options, font definitions must be set in your HTML. The Template Kit does not format the text, allowing you to choose a design. Conversely, this means that links in continuous text (if used) must be formatted accordingly in the RSS feed.
- **Width specifications**. RSS feed paragraphs may vary in width. When using an alternate layout, you should preferably only work with percentages, or not apply width specifications. Otherwise, you can work with fixed widths as long as the RSS feed paragraph is used in the

same configuration, *or* a separate layout variant is defined for each different paragraph width.

- **Aspect ratio**. The Template Kit can only edit images to a limited degree if an alternative layout option is used (whatever content width is present is applied as the maximum width). You should provide images with the required width. Also, you can also scale the image by setting a specified width in HTML. This is not recommended, however, because some applications (such as Microsoft Outlook) ignore this information and display the image in its original size.
- **Link alignment/Image position**. These options are inoperative when using an alternative layout. The arrangement/positioning of elements is set by the HTML
- **Risk of display errors**. When manually entering HTML for desktop and mobile versions, make sure that the content displays properly in a variety of email programs and web mailers. Otherwise, this can lead to serious display errors.

Variable	Type	Description
rssItemFirst	Boolean	Is true, if it is the first article of the RSS feed paragraph, otherwise false.
rssItemIndex	Integer	Shows the position of the article within the RSS feed paragraph as a number (1 for the first article, 2 for the second article and so on).
rssItemLast	Boolean	Is true, if it is the last article of the RSS feed paragraph, otherwise false.

Variable	Type	Description
rssTitlePresent	Boolean	Contains true, if content is present for the **Title** box, otherwise false.
rssTextPresent	Boolean	Contains true, if content is present for the **Text** box, otherwise false.
rssAuthorPresent	Boolean	Contains true, if content is present for the **Author** box, otherwise false.
rssDatePresent	Boolean	Contains true, if content is present for the **Date** box, otherwise false.
rssCategoriesPresent	Boolean	Contains true, if content is present for the **Categories** box, oth-

Variable	Type	Description
		erwise *false*.
rssLinkTextPresent	Boolean	Contains *true*, if content is present for the **Text** box in the **Link** group, otherwise *false*.
rssLinkUrlPresent	Boolean	Contains *true*, if content is present for the **URL** box in the **Link** group, otherwise *false*.
rssCommentsLinkTextPresent	Boolean	Contains *true*, if content is present for the **Text** box in the **Link to the comments** group, otherwise *false*.
rssCommentsLinkUrlPresent	Boolean	Contains *true*, if content is present for the **URL** box in the **Link to the comments** group, otherwise *false*.
rssImageUrlPresent	Boolean	Contains *true*, if content is present for the **Image** box (Upload file) in the **Image** tab, otherwise *false*.
rssImageAltTextPresent	Boolean	Contains *true*, if content is present for the **Alternative text** box in the **Image** tab, otherwise *false*.
rssImageLinkPresent	Boolean	Contains *true*, if content is present for the **Link** box in the **Image** tab, otherwise *false*.
Variable	Type	Description
rssTitleValue	String	Text for the **Title** box.
rssTextValue	String	Text for the **Text** box.
rssAuthorValue	String	Text for the **Author** box.
rssDateValue	String	Text for the **Date** box.
rssCategoriesValue	String	Text for the **Categories** box.

Variable	Type	Description
rssLinkTextValue	String	Text for the **Text** box in the **Link** group.
rssLinkUrlValue	String	Text for the **URL** box in the **Link** group.
rssCommentsLinkTextValue	String	Text for the **Text** box in the **Link to the comments** group.
rssCommentsLinkUrlValue	String	Text for the **URL** box in the **Link to the comments** group.
rssImageUrlValue	String	Image URL (Upload Image) for the **Image** tab.
rssImageAltTextValue	String	Text for the **Alternative Text** for the **Image** tab.
rssImageLinkValue	String	Text for the **Link** box for the **Image** tab.
editBar	String	Inserts the button bar for the RSS feed article. This is necessary when placing articles side-by-side, for example, to integrate the button bar into the table. If this variable is not present, the button bar is placed above the article.

Example for an alternative layout

The example creates a two-columned layout using a width of 580 pixels.

> **Note:** Remove HTML comments, whitespaces, and blank lines when copying the HTML to the Template Kit. They may be sent along with the newsletter and, thus, expand the newsletter source code.

```
<!-- This query ensures that content is only displayed if the contents used for this layout are
available. -->
#if($rssTitlePresent || $rssImageUrlPresent || $rssAuthorPresent || $rssDatePresent || $rssTex-
tPresent || ($rssLinkTextPresent && $rssLinkUrlPresent))
    <!-- To enable the two-column layout, a border table is opened in the first RSS feed art-
icle. -->
    #if($rssItemFirst)
        <table border="0" cellpadding="0" cellspacing="0">
            <tr>
    #end

    <!-- For every article, a table cell with half the width is created. This table cell
```

```
contains the entire contents of the RSS feed item. -->
    <td width="280" align="left" valign="top">

        <!-- The button bar is placed here so it is displayed above the corresponding RSS feed
article. -->
        $editBar
        #if($rssTitlePresent)
            <font size="2" face="Arial, sans-serif" color="#000001" style="font-size: 14px;"><b>
                #if($rssLinkUrlPresent)
                    <a href="$rssLinkUrlPresent" style="color: #000001; text-decoration: none;"
target="_blank">
                #end
                    <font size="2" face="Arial, sans-serif" color="#000001" style="font-size:
14px;"><b>$rssTitleValue</b></font>
                #if($rssLinkUrlPresent)
                    </a>
                #end
            </b></font>
            <table width="100%" cellspacing="0" cellpadding="0" border="0">
                <tr>
                    <td width="100%" height="10"></td>
                </tr>
            </table>
        #end

        #if($rssImageUrlPresent)
            #if($rssImageLinkPresent)
                <a href="$rssImageLinkValue" target="_blank">
            #end
            #if(!$rssImageLinkPresent && $rssLinkUrlPresent)
                <a href="$rssLinkUrlValue" target="_blank">
            #end
            <!-- An image width of 130 pixels is specified. You should provide an image that
already have the required width. Otherwise it will be stretched or compressed. -->
            <img src="$rssImageUrlValue" alt="$rssImageAltTextValue" width="130" border="0"
align="right" style="display: block; float: right;" />
            #if($rssImageLinkPresent || $rssLinkUrlPresent)
                </a>
            #end
        #end

        #if($rssAuthorPresent || $rssDatePresent || $rssTextPresent)
            <font size="1" face="Arial, sans-serif" color="#666666" style="font-size: 11px;">
                #if($rssDatePresent || $rssAuthorPresent)
                    <span style="font-size: 10px;">
                        $rssDateValue
                        #if($rssDatePresent && $rssAuthorPresent)
                            |
                        #end
                        $rssAuthorValue
                    </span>
                    <table width="100%" cellspacing="0" cellpadding="0" border="0">
                        <tr>
                            <td width="100%" height="10"></td>
                        </tr>
                    </table>
                #end
                $rssTextValue
            </font>
        #end

        #if($rssLinkTextPresent && $rssLinkUrlPresent)
            <font size="1" face="Arial, sans-serif" color="#666666" style="font-size: 11px;
```

```
line-height: 11px;">
                &ndash;
                <nobr>
                    <a href="$rssLinkUrlValue" style="line-height: 11px; color: #666666; text-
decoration: underline;" target="_blank">
                        <font size="1" face="Arial, sans-serif" color="#666666" style="font-
size: 11px;">
                            <u>$rssLinkTextValue</u>
                        </font>
                    </a>
                </nobr>
            </font>
        #end
    <!-- After every first (left-aligned) RSS feed article, the table cell is closed and a new
one is opened. -->
    #if($rssItemIndex % 2 == 1)
        </td>
        <td width="20"></td>
    <!-- After every second (right-aligned) RSS feed article, the above opened table is closed,
some space is inserted and a table is opened. -->
    #else
            </td>
        </tr>
    </table>
    #if(!$rssItemLast)
        <table width="580" border="0" cellpadding="0" cellspacing="0">
            <tr>
                <td width="580" height="20"></td>
            </tr>
        </table>
    #end
    <table border="0" cellpadding="0" cellspacing="0">
        <tr>
    #end

    <!-- After the last RSS feed article the table is closed. -->
    #if($rssItemLast)
        </tr>
    </table>
    #end

#end
```

Facebook

The Facebook paragraph contains a standard layout for the visual design of Facebook articles. If you want, you can store up to 2 additional layouts as HTML code. You can select custom layouts from a drop-down list in the Facebook paragraph (see **Facebook layouts**).

> **Warning:** To edit alternative layouts, you must have in-depth knowledge of HTML, CSS, and Velocity. Otherwise, display errors may occur in your mailings.

Parameter	Description
Order (standard layout)	

Parameter	Description
Position 1–3	Specify where to display the date, author, and text by selecting the desired option from the drop-down list. To specify distance between them, in the **General** tab under **Layout**, change the value of **Space between texts and images**.
Layout 1 and 2	
Desktop version	Enter the source code for the desktop version.
Mobile version	Enter the source code for the mobile version.
Text version	Enter the source code for the text version.

Twitter

The Twitter paragraph contains a standard layout for the visual design of your Tweets. If you want, you can store up to 5 additional layouts as HTML code. You can select custom layouts from a drop-down list in the Twitter paragraph. (See **Twitter layouts**).

> **Warning:** To edit alternative layouts, you must have in-depth knowledge of HTML, CSS, and Velocity. Otherwise, display errors may occur in your mailings.

Parameter	Description
Order (standard layout)	
Position 1 –3	Specify where to display the date, author, and text by selecting the desired option from the drop-down list. To specify the distance between these information, in the **General** tab under **Layout**, change the value of the **Space between texts and images** box.
Layout 1 and 2	

Parameter	Description
Desktop version	Enter the source code for the desktop version.
Mobile ver-sion	Enter the source code for the mobile version.
Text ver-sion	Enter the source code for the text version.

Navigation menu

The navigation menu paragraph contains a standard layout for the visual design of navigation menu. If you want, you can store up to 5 additional layouts as HTML code. You can select custom layouts from a drop-down list in the navigation menu paragraph. (see **Navigation menu layouts**).

Warning: To edit alternative layouts, you must have in-depth knowledge of HTML, CSS, and Velocity. Otherwise, display errors may occur in your mailings.

Parameter	Description
Layout 1-5	
Desktop version	Enter the source code for the desktop version.
Mobile version	Enter the source code for the mobile version.
Text version	Enter the source code for the text version.

Structured data

Add structured data to your mailing to present the email more prominently and attractively in the recipient's inbox or to add additional functions. The recipient's email program must support structured data for this. If this is not the case, the structured data is ignored and the email is displayed regularly in the recipient's inbox.

Select the checkbox in the **Gmail Promotions tab** section to place the email prominently in the Gmail Promotions tab using structured data. Depending on the provided content, Gmail will add a company logo, an image banner, a coupon code and a timer to the email preview.

> **Note:** The structured data generated by Episerver Campaign is in conformance with Gmail's specifications. However, Episerver has no influence on how the structured data is ultimately interpreted in Gmail's inbox. For more information on the Gmail Promotions tab, see Gmail developer website.

Alternatively, you can enter structured data directly as JSON-LD script in the **JSON-LD source code** section. Note that no validation takes place and that even a small error in the JSON-LD source code can result in the structured data not being read. In any case, test the display in advance using a test dispatch.

Parameter	Description
Gmail Promotions tab	
Activate	Check to add structured data to your mailing. By clicking **Apply**, a yellow box at the top of the edit area labeled **Structured data is activated for this mailing** appears. Click **Display** to display the JSON-LD script in the head section of the HTML code. > **Tip:** If you have knowledge of JSON-LD, you can use the code preview to review, copy, and modify the code in the **JSON-LD source code** section.
Start date	To promote a limited time offer, you must specify a start date. The start date must lie before the mailing's send date to ensure that Gmail considers the structured data. Use the indicated date format.
Start time	Define a start time. Use the time format *hh:mm:ss*.
End date	From the end date and end time, Gmail calculates the timer until the end of the offer. The end date must lie after the mailing's send date to ensure that Gmail considers the structured data. Use the indicated date format.
End time	Define the end time of the offer. Use the time format *hh:mm:ss*.

Parameter	Description
Time zone	Select the time zone to which your time specifications refer. Gmail uses this to calculate the end time for the recipient's time zone. Example: An offer that ends at 10:00 AM in the UK ends at 6:00 PM in Japan.
Logo	Upload your company logo. The logo will be displayed next to the mailing preview. Alternatively, you can enter an external URL where the logo can be found. Use a square image format with an image size of at least 40 x 40 pixels.
Coupon description	Enter a description to your coupon code. Example: *30% discount*.
Coupon code	Insert a coupon code or placeholder depending on how you generate the coupon code. For information on how to create and include coupon codes with Episerver Campaign, see **Coupon system**.
Image	Upload an image that will be displayed below the text in the email preview. Alternatively, you can enter an external URL where the logo is to be found. Use a rectangular image format with an image size of at least 324 x 83 pixels.

Tracking

You can extend outgoing links with tracking parameters. With the help of web analytics software, you can use these parameters to analyze click behavior. You can define up to five tracking parameters. Each consists of a key (parameter name) and value.

Parameter	Description
Parameter 1-5	
Key	Enter the name of the parameter.
Value	Enter the value of the parameter (integer or string).

Text version

If you do not want to use the automatically generated text version, created from content you enter in the template editor, enter a text version for the complete newsletter. If you enable this option, no content is converted automatically into the text version.

Parameter	Description
Alternative text version	
Activated	By default, this check box is cleared, and the text version is created automatically. If you check this box, you must enter a text version manually in the field below. Otherwise, no text version is sent with your mailing.
Text	Enter the newsletter text. You cannot use HTML or other formatting in the text version. Only line breaks and special characters (such as ****** or ++++++) can be used to structure the newsletter.

Mobile

Activate an optimized version of your mailing for mobile devices. This version is sent together with the desktop version and displayed on smart phones and tablets.

Parameter	Description
General	
Activate mobile version	Check to create a mobile version of the newsletter. By default, newsletter content is included in the mobile version. For each paragraph, you can define whether it is displayed or omitted in the mobile version. Note that the size of each email that contains a mobile version will increase by approximately 50-100 KB.
Click profile	Select a click profile that is assigned to each recipient who clicks in the mobile version. Use the click profile to analyze the usage of the mobile version or to create target groups containing mobile users.

Parameter	Description
Activate link exten- sion	If you want to track mobile version links separately so that they are available in advanced reports, check this box. If you do, an additional parameter **mobile** with a value of 1 is appended to mobile newsletter links. You can also use click profiles to achieve more convenient reporting.

Setting the pre-header

The pre-header is the first text part of a newsletter, positioned above the content. In most cases, the pre-header presents a link similar to *If this message is not displayed correctly, click here*, which redirects to the online version of the newsletter. This is useful as many email programs and providers (such as Outlook, Hotmail, Gmail) block images by default. Other examples of pre-headers are an unsubscribe link, or a hint about adding the sender to the recipient's address book.

To insert a pre-header, click **New: Pre-Header** in the template editor. You can use several pre-headers and assign them to target groups to restrict the pre-header to certain recipient segments.

Change the settings described below as desired and confirm by clicking **Apply**.

General

Parameter	Description
Content	
Text	Enter the pre-header text, such as a reference and link to the online version.
Show in online ver- sion	Select to include this paragraph in the online version.
Show in desktop ver- sion	Select to include this paragraph in the desktop mailing.

Parameter	Description
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in text version	Select to show the paragraph in the text version of the mailing.

Options

Use these settings to define a pre-header layout that is from the default newsletter settings.

Parameter	Description
Layout	
Width	Enter an integer value in pixels.
Alignment	Select a value from the drop-down list.
Background color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Enter an integer value.
Mobile	
Width	Enter the width of the mobile newsletter in percentage.

Click profiles

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See **Target groups**.

Setting up a pre-header for emails

If a subscriber clicks the link to the online version or reloads the newsletter images (that is, right-mouse clicks the blocked images), these steps may result in a premature closing of the newsletter by deleting it or marking it spam.

During the first weeks of subscription, use a pre-header to ask recipients to add your mailing address to their email address book. If they do, email sent from known addresses is immediately displayed in full, including images, by many email programs and providers (such as Gmail, Hotmail, Outlook). Such recipients also see your newsletter in email preview.

Adding your mailing address to a subscriber's address book also improves deliverability, since the email program classifies your newsletter as trustworthy. This is also very important with regard to "smart mailboxes" that some email providers are using.

To implement a pre-header into your emails, select recipients, adapt the email's HTML code, and create a filter.

Selecting recipients

You should only send a pre-header to new subscribers. Recipients who have received your newsletter for a time may have already updated their address book, or might not want to. So, create a filter for the pre-header that selects recipients who registered for the newsletter in the last three to four weeks. Adjust the time period to the sending frequency of your newsletter. Send on a monthly basis instead of every week, or try 60 days.

Adapting the email

The pre-header should contain a short text, asking the recipient to take action:

```
Please add our mailing address "newsletter@example.com" to your address book!
```

Creating a filter

To show this text to newly-registered recipients only, create a new **Field function** using the filter, or use a script. For example, many email marketing programs support the **Velocity scripting language**, which lets you add logic to HTML code to perform recipient-dependent dynamisations.

Depending on how flexibly the pre-header is supposed to be used, fixed filters could be linked, or the filter and/or the registration period for the filter could be designed as selectable.

Adapting the text version

In the first line of the text version of the newsletter, you should also prompt subscribers to add the mailing address to their address book.

Testing your changes

1. Create an email address for testing.
2. Send an email to the address whose opt-in date falls within the relevant time period.

Setting the header

By default, the header contains a text/image paragraph with a logo and issue number. Complete this information and upload your company logo.

- The newsletter contains only one header element.
- The header can contain several paragraphs.
- You can select the same paragraph types as in the content section.
- You can remove the header if not needed.

To add a new paragraph in the header, click **Header**; see **Content paragraphs**.

To define the layout and select other options, click **Header**; see **Grouping paragraphs**.

Setting the footer

The footer usually contains contact and legal information and an imprint.

- You can add more paragraphs to the footer.
- The newsletter contains only one footer element.

- You can remove the footer if not needed.

To add a new paragraph in the footer, click **New: Footer paragraph**; see **Content paragraphs**.

To define the layout and select other options in the footer, click **Footer**; see **Grouping paragraphs**.

Grouping paragraphs

Grouping paragraphs serve to structure the newsletter, but do not contain any content. From a high-level perspective, a newsletter only contains pre-header, header, footer, and grouping paragraphs. You can add to a mailing several grouping paragraphs, then insert content paragraphs into them.

Each grouping paragraph can contain its own table of contents, or you can create one table of contents for all grouping paragraphs. Grouping paragraphs provide additional layout options, such as a sidebar.

- To add a grouping paragraph, click **New: Paragraph** then **Grouping paragraph**. Configure it as described below.
- To add content to a grouping paragraph, click **New: Content paragraph**, click a paragraph type, and edit it; see **Content paragraphs**.
- To add a new separator, click **New: Paragraph** then **Separator**. Configure the separator; see **Separator paragraph**. Click **Apply**, to add the separator to the newsletter.

Main area

Parameter	Description
Layout	
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.

Parameter	Description
Space between content paragraphs	Specify the space (vertical and horizontal) between content paragraphs within a grouping paragraph.
Border	
Show	Select if you want to apply a border around the grouping paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Rounded corners	**Show** must be selected for this parameter to be effective. The radius value is the same as the padding value set for this paragraph. If no padding value is set, a value of 10 pixels is assumed. If you select this option, only a single value for border width is used. If more than one value is defined, only the first one is used for all sides.
Background	
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Image	The correct display of background images is not supported by all email clients. So, the background image should contain no important information.

Parameter	Description
	If you use a background image, the parameters **Alignment** and **Repeat** become effective. Note that background images are only visible at the border areas and at free spaces. Otherwise, they are covered by content and other backgrounds.
Alignment	Only effective if a background image is uploaded. Sets the alignment for the whole newsletter. Alignment of the content elements is defined in the content paragraphs.
Repeat	Only effective if a background image is uploaded. Repeats the background image.

Sidebar

Optionally, grouping paragraphs can be displayed in a two-column layout, with a main area and a sidebar. The sidebar can contain the same content paragraphs as the main area.

Parameter	Description
Layout	
Show	Select to show a sidebar in this grouping paragraph.
Width	The value cannot exceed the total width of the content area.
Position	The sidebar may appear to the left or the right of the main area.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.

Parameter	Description
Space between content paragraphs	Specify the space (vertical and horizontal) between content paragraphs within a grouping paragraph.
Space between sidebar and main area	Specify the space between the sidebar and the main area.
Mobile	
Position	In the mobile version, the sidebar is positioned above or below the main area, due to the reduced available space. Select the desired position from the drop-down list. This option is only in effect if the mobile version is activated in the general settings.
Border	
Show	Select if you want to apply a border around the entire paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Rounded corners	**Show** must be selected for this parameter to be effective. The radius value is the same as the padding value set for this paragraph. If no padding value is set, a value of 10 pixels is

Parameter	Description
	assumed.
	If you select this option, only a single value for border width is used. If more than one value for border width be defined, only the first one is assumed for all sides.
Background	
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Image	The correct display of background images is not supported by all email clients. So, the background image should contain no important information.
	If you use a background image, the parameters **Alignment** and **Repeat** become effective. Note that background images are only visible at the border areas and at free spaces. Otherwise, they are covered by content and other backgrounds.
Alignment	Only effective if a background image is uploaded. Sets the alignment for the whole newsletter. Alignment of the content elements is defined in the content paragraphs.
Repeat	Only effective if a background image is uploaded. Repeats the background image.

Options

Parameter	Description
Layout	
Background color (outer area)	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.

Click profiles

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups. Note: For paragraphs in the header and footer you cannot select target groups, because these elements are considered mandatory in every mailing.

Content paragraphs

Within your mailing's Grouping paragraphs, you can insert the following types of content paragraphs and fill them with content. To do this, click New: Content paragraph and select the desired type.

- Product paragraph. Adds a paragraph with predefined fields for product details. See also: General settings.
- Product paragraph with content interface. Imports product data, such as offer texts and product images, from your webspace or server into the Template Kit.
- Content interface paragraph. Add items from your online shop to a mailing.
- Source code paragraph. Enter HTML and a separate text version.
- Text or image paragraph. Contains a text area and an image, which you can place relative to a text block and headline.
- Table of contents paragraph. Automatically creates a table of contents from the headlines of content paragraphs or a grouping paragraph. It is placed in content paragraphs in the newsletter. Content paragraphs excluded from the table of contents are ignored.
- Image bar paragraph. Create a vertical or horizontal image bar with up to 10 images. The images are scaled down automatically; so, the more images you include, the smaller each image is displayed.
- Separator paragraph. Only for structuring purposes; contains no content.

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- RSS feed paragraph. Load content from an RSS feed into your mailing.
- Recommendations paragraph. Adds automatically generated individual recommendations for each recipient through a URL. You need a software that generates recommendations based on a recipient's actions.
- Facebook paragraph. Integrate current Facebook posts into your message.
- Twitter paragraph. Integrate current tweets into your message.
- Navigation menu. Creates navigation bars with links to landing pages or deep links.

Product paragraph

Use the product paragraph to add items from your online shop to a mailing. The paragraph contains input fields for:

- Product name
- Description
- Category
- Old price
- Current price
- Manufacturer

Define the order of the fields in the general settings. You can use your own categories instead of the standard categories. In this case, contact customer support before setting up the template.

Product paragraph fields have no formatting by default. To manually edit the paragraph, use the editor. Or, when using a content interface paragraph, use HTML, which can be transferred together with the contents.

> Tip: Content interface
>
> The product paragraph is prepared for use by the Content interface, which you can use to automatically complete content fields, for example, with product data from your inventory management system.

Creating a product paragraph

1. While editing the content of a mailing in the Template Kit, click **New: Content paragraph**. A window for selecting the paragraph type opens on the right side.

   > **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.
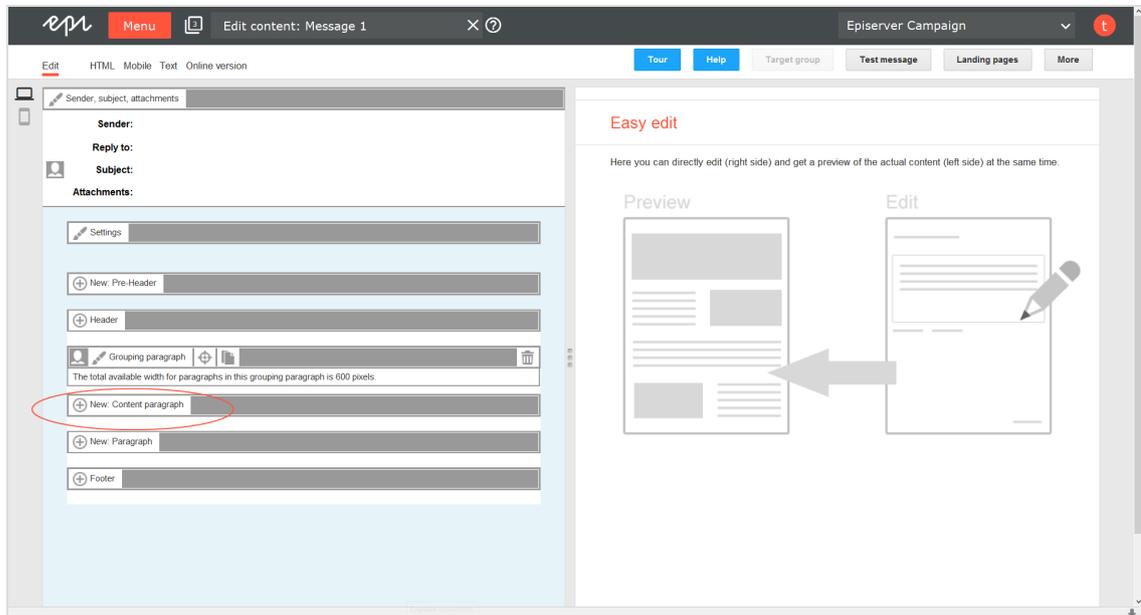
2. Click **Product**. The configuration window for the selected paragraph type opens.
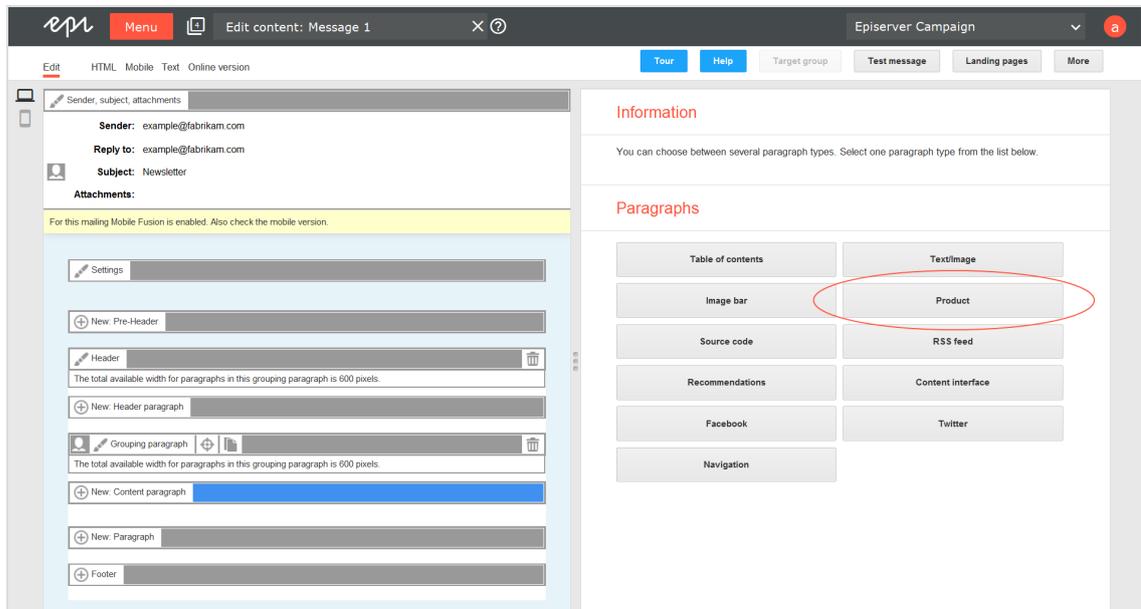
3. Click **Apply**. The new product paragraph appears in the preview window on the left.
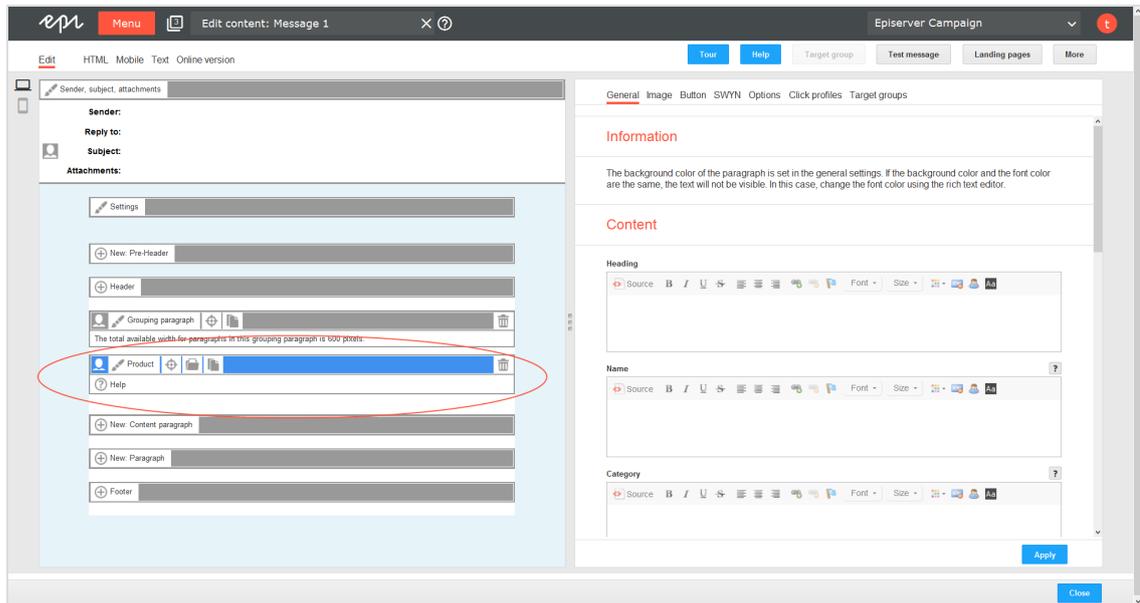
Configuring a product paragraph

1. On the left, in the menu bar of the product paragraph, click **Product**. The configuration window opens on right.

2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.
   - General
   - Image
   - Button
   - SWYN
   - Options
   - Click profiles
   - Target groups
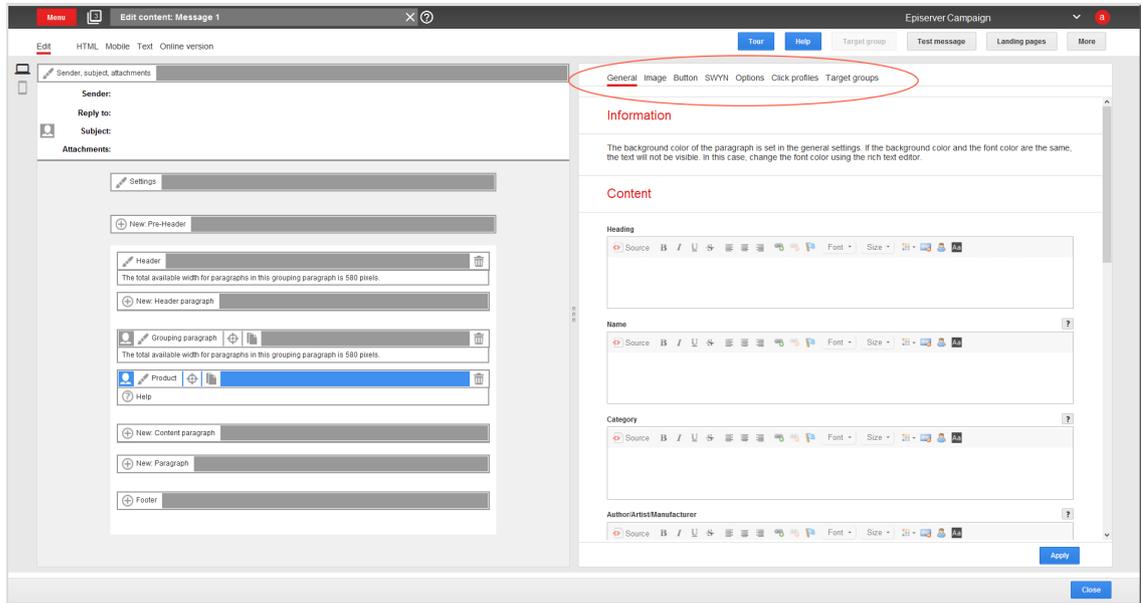
General

Parameter	Description
Content	
Heading	Enter a heading for this paragraph.
Name	Enter a product title or a work title.
Category	Enter a product category or a genre.
Author/Artist/Manufacturer	Enter the name of the author, artist, or manufacturer.
Text	Enter a product description or an abstract of a work.
Old price	If you want to create a promotional campaign, a bargain, or a special offer, enter product's old price.
Current price	Enter the product's current price.

Parameter	Description
Show in desktop version	Select to include this paragraph in the desktop mailing.
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in text version	Select to show the paragraph in the text version of the mailing.
Link	
Text	Text entered here is linked to the URL below.
URL	This could be a landing page or a product details page from your online shop.
Alignment	The link can be aligned right, left, or center.

Image

Parameter	Description
Image	Upload an image or enter an image URL in the field **Alternatively external URL** that points to the image file.
Alternative text	This text is displayed if a recipient blocks or disables images in the email client, or if the image cannot be displayed for another reason. Enter alternative text containing a short description or title for the image.
Link	You can link the image to a landing page or a page on your verbosity you entered a text link in this paragraph, you should use the same link for the image.
Subtitle	Enter an optional image subtitle.
Position	You can place the image in a separate column next to the heading and text block, or in a separate

Parameter	Description
	column next to the text block but below the headbanging most cases, these positions are recommended.
	If you use large images that cover the entire width of a paragraph or area, center them below the heading, the text, or the link.

Button

See [Click2Go](#).

SWYN

You can enable the SWYN function for social networks individually for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.

Parameter	Description
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
MySpace	
Parameters for MySpace are identical to Facebook's.	
Xing	
Parameters for Xing are identical to Twitter's.	

Options

For each content paragraph, you can define a layout that is different from the general newsletter layout.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Background color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Border	
Show	Check to apply a border around the paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to sep-

Parameter	Description
	arate multiple pixel entries:
	1 = sides uniform with 1 pixel 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left.
	If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Table of contents	
Show in Table of Contents	Select to display the paragraph in the table of contents for the section.
Alternative Table of Contents Entry	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See **Target groups**.

Product paragraph with content interface

> **Note:** Contact customer support to activate this function. You must specify the directory on your webspace or your server where you will store your product data.
>
> This directory must allow HTTP requests. If the product data directory is only accessible with authentication, disable the authentication. If desired, you can only allow specific IP addresses to access product data.

The product paragraph with content interface imports product data, such as offer texts and product images, from your webspace or server to the Template Kit. It lets you create product offers in your merchandise management system then transfer them to the Episerver **Template Kit**. You can recommend products, offer discounts, provide notifications of new releases, create a new product paragraph, and import product offers with just a few clicks.

You can store product data statically as XML files on your server, have your server dynamically generate XML files as requested by the content interface. Episerver Campaign retrieves your product data and makes it available to your messages.

Configuring the content interface

When the feature is enabled, a new button with a folder icon appears on the menu bar of the product paragraph.
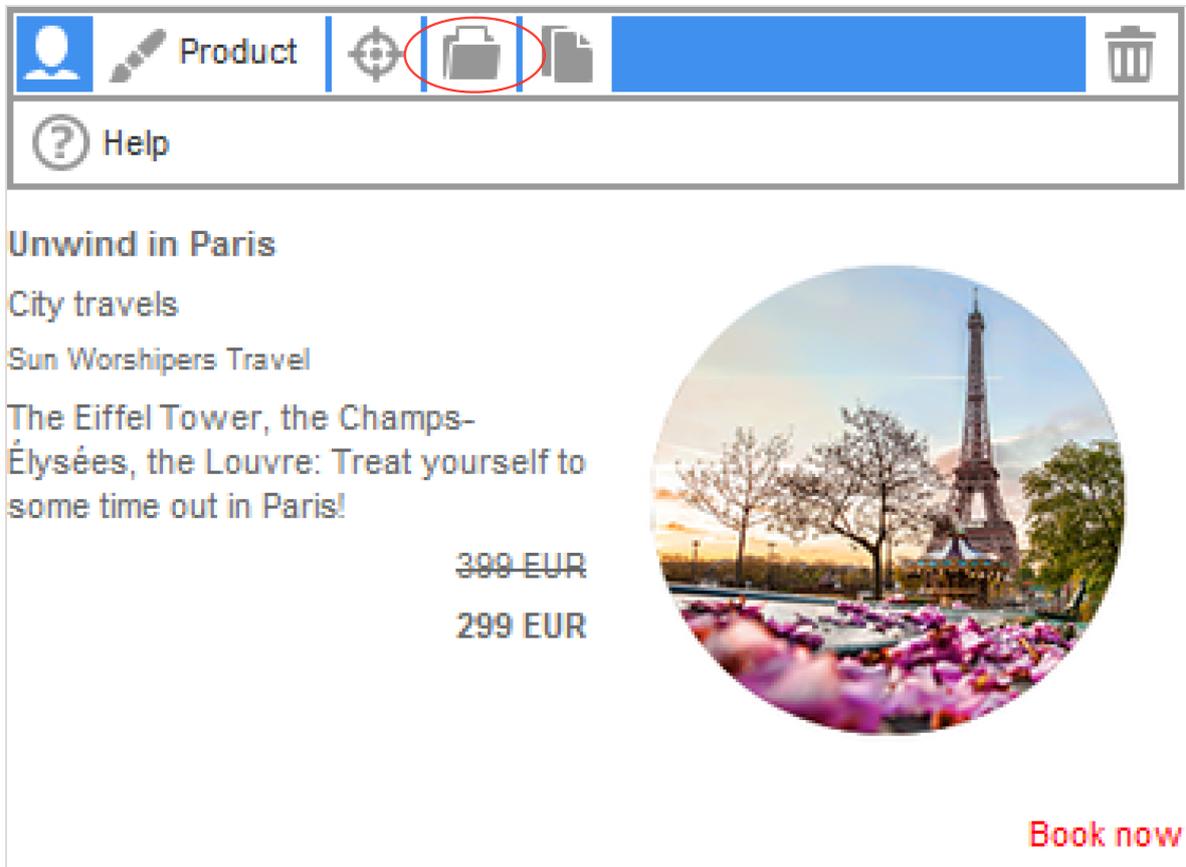
Product paragraph with content interface default values

The product paragraph can load the following product data through the content interface:

1. unique ID
2. name
3. category
4. authors/performers/manufacturers/providers
5. description
6. old price
7. current price
8. URL link to the product, such as in your web shop
9. text label for the URL link, for example, "Book now"
10. an image URL, for displaying a product image

The following image shows the individual components of a sample product offer.
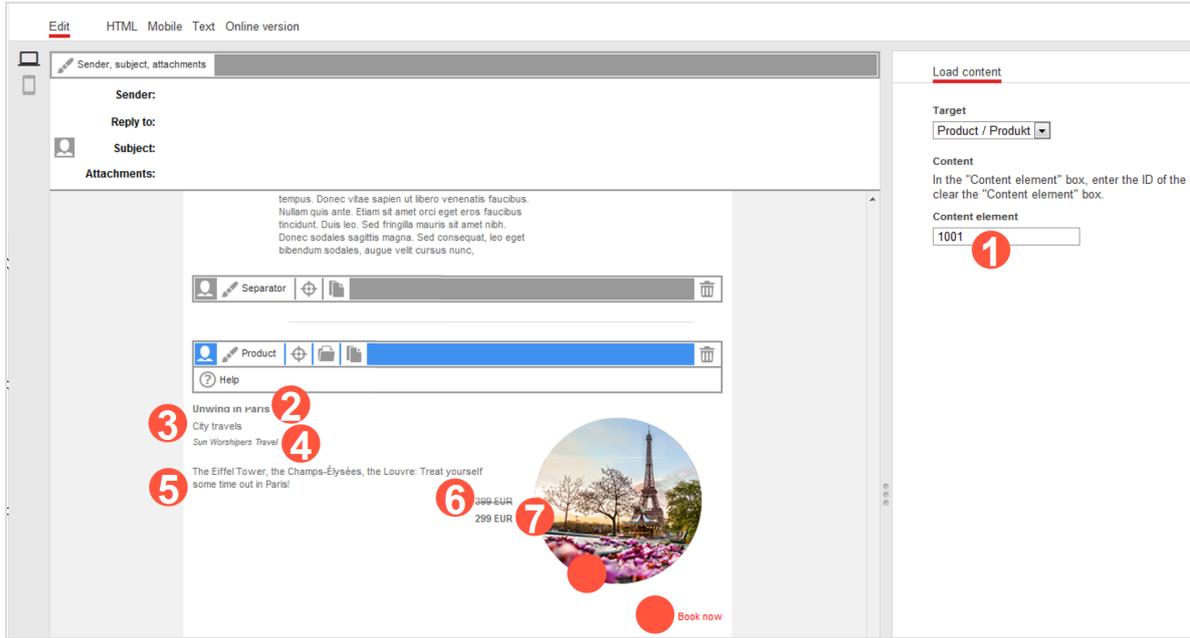
Making product data available as XML

An HTTP request is used to load product data from your webspace or server to the Template Kit and start the import into Episerver Campaign.

When the request is made, your product data must:

- exist on your webspace or server as an XML file (static product data)

  or

- be generated dynamically in an XML format (dynamic product data)

> **Tip:** Your company's environment determines whether you import static or dynamic product data. Contact your system administrator to learn which implementation is in use.

Saving static product data as XML on the server

To save product data statically as XML files on your webspace or server, each product must be saved in an XML file. You cannot group multiple products into a single XML file. To save a product as an XML file, perform the

following steps.

1. Open a text editor, such as Notepad (Windows) or Textedit (macOS/OS X).
2. Create a new document.

> **Warning:** Set your text document to use UTF-8 character encoding. If you use another encoding, the text may not be represented properly.

3. Copy the following code into the document.
   Code sample

```
<element>
<property name="id"><![CDATA[123456]]></property>
<property name="name"><![CDATA[Name]]></property>
<property name="category"><![CDATA[Category]]></property>
<property name="manufacturer"><![CDATA[Author/Artist/Manufacturer]]></property>
<property name="text"><![CDATA[Product description]]></property>
<property name="oldPrice"><![CDATA[<s>EUR 29.99</s>]]></property>
<property name="currentPrice"><![CDATA[<b>EUR 19.99 EUR</b>]]></property>
<property name="linkText"><![CDATA[Add to shopping cart]]></property>
<property name="linkUrl"><![CDATA[http://www.example.com/product/123456]]></property>
<property name="imageUrl"><![CDATA[http://img.ex-
ample.com/product/123456.jpg]]></property>
</element>
```

> **Tip:** The following steps guide you through customizing this code for your setup. Only product ID (in code, the property **id**) and product name (in code, the property **name**) are mandatory. Other values are optional. Delete any unused values.
>
> Example: You do not want to specify product manufacturer, so delete the following line:

```
<property name="manufacturer"><![CDATA[Author/Artist/Man-
ufacturer]]></property>
```

> Alternatively, leave unneeded lines of code empty. For example, you want to enter the information later. If you do not want to specify the product manufacturer and want to leave the code in the document, the line looks like this:

```
<property name="manufacturer"><![CDATA[]]></property>
```

> **Tip:** You can use HTML source code in these properties: **name**, **category**, **manufacturer**, **text**, **oldPrice**, **currentPrice**. For example, you want to insert links into the product description.

4. In the first property row, enter the product ID between the square brackets after **CDATA**.

   Example: The product ID is `ParisTrip01`.

   ```
   <property name="id"><![CDATA[ParisTrip01]]></property>
   ```

   > **Note:** Use only alphanumeric characters (letters and numbers) in the product ID. If you use special characters, you may encounter problems importing product data.

5. In the second property line, enter the product name between square brackets after **CDATA**.

   ```
   <property name="name"><![CDATA[Unwind in Paris]]></property>
   ```

6. In the third property line, enter the product category between square brackets after **CDATA**.

   ```
   <property name="category"><![CDATA[City travels]]></property>
   ```

7. In the fourth property line, enter the product manufacturer (or, depending on product, author, artist, operator, manufacturer, and so on) between square brackets after **CDATA**.

   ```
   <property name="manufacturer"><![CDATA[Sun Worshipers Travel]]></property>
   ```

8. In the fifth property line, enter the product description, for example text and a website link, between the square brackets after **CDATA**.

   ```
   <property name="text"><![CDATA[Eiffel Tower, Champs-Élysées, Louvre: Treat yourself to
   some time out in Paris!"]]></property>
   ```

9. In the sixth property line, enter the product 's old price between `<s>` and `</s>`.

   ```
   <property name="oldPrice"><![CDATA[<s>EUR 399</s>]]></property>
   ```

   > **Note:** The old price is crossed out by default. To omit the strikethrough in your communications, delete `<s>` and `</s>`.

10. In the seventh property line, enter your product's current price between `<b>` and `</b>`.

    ```
    <property name="currentPrice"><![CDATA[<b>EUR 299</b>]]></property>
    ```

    > **Note:** By default, the current price is displayed in bold. To omit the bold, delete `<b>` and `</b>`.

11. In the eighth property line, enter a text label for a product link between the square brackets after **CDATA**.

    ```
    <property name="linkText"><![CDATA[Book now]]></property>
    ```

12. In the ninth property line, enter the URL link to your product between the square brackets after **CDATA**.

```
<property name="linkUrl"><![CDATA[http://www.sonnenhungrig.com/paris]]></property>
```

13. In the tenth property line, enter the URL to your product image between the square brackets after **CDATA**.

```
<property name="imageUrl"><![CDATA[http://www.sonnen-
hungrig.com/eiffeltower.jpg]]></property>
```

14. Save the text document. For the file name, use the product ID (the value you inserted for the **id** property). For file type. use .xml.

15. Delete the document's file extension. For example, if the document is named `ParisTrip01.xml`, rename the file as `ParisTrip01`.

> **Warning:** If you do not remove the file extension, your product data cannot be loaded.

16. Save the document in your webspace or on your server in the directory that you communicated for the setup of the product paragraph with content interface.

> **Warning:** Do not change the location of the product description documents without consulting customer support. If you change directories without consulting customer support, you cannot load product data using the content interface.

After saving these documents, you can access your product offer in the Template Kit. Follow the steps in Load and edit product data to upload your product offer into the Template Kit using the content interface.

Generating dynamic product data on the server

XML files are not prepared manually, but are loaded from a database when requested (by HTTP request) via the content interface and automatically generated as XML. If you want to generate dynamic product data, see your system administrator.

Loading and editing product data

After product data is made available as XML files in your webspace or on your server, and customer support has stored your data source in your client, you can load product data into the Template Kit. After the import is complete, you can edit the data in the Template Kit using the content interface.

Loading product data
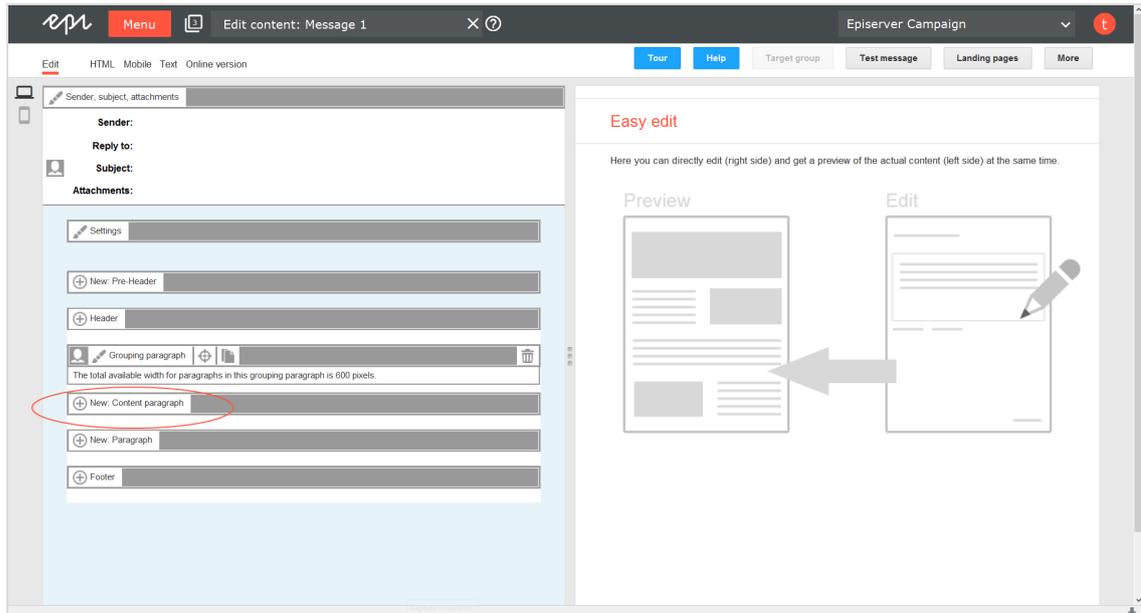
1. In the Template Kit, click **New: Content paragraph**.

2. Click **Product**. The configuration window for the selected paragraph type opens.
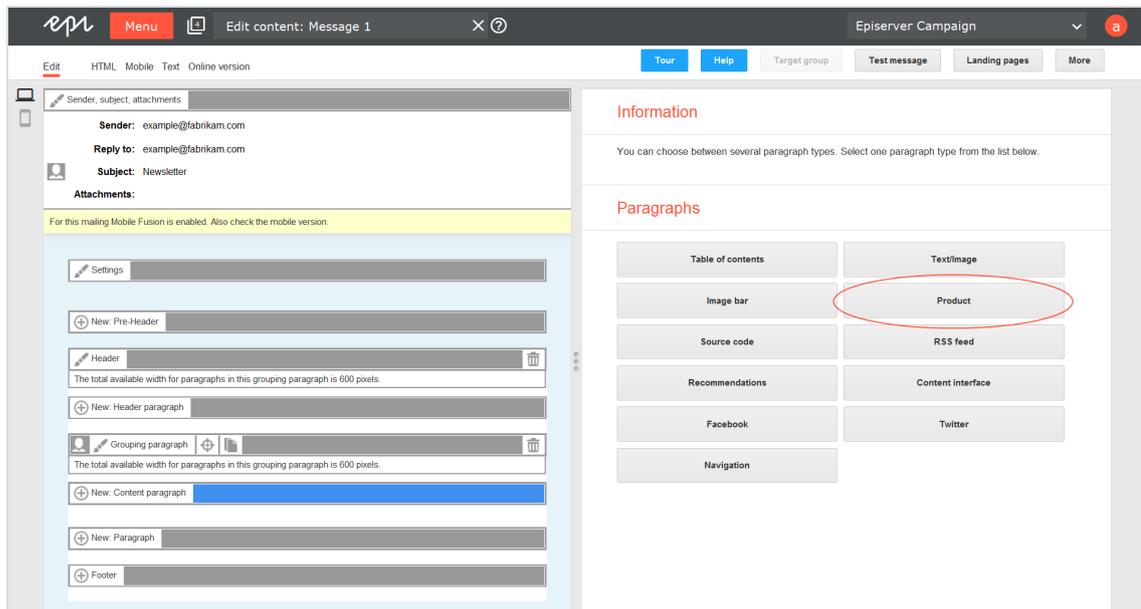
3. Do not change settings in the configuration window. Click **Apply**. The new product paragraph appears on the left, in the preview window.
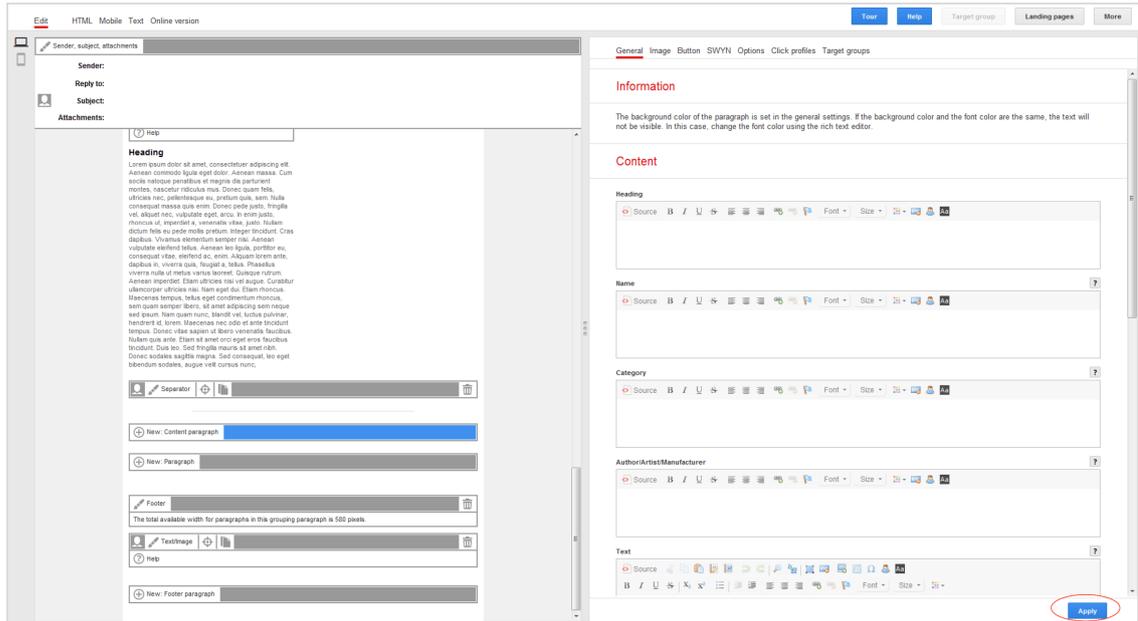
4. In the menu bar of the new product paragraph, click **Content interface** .
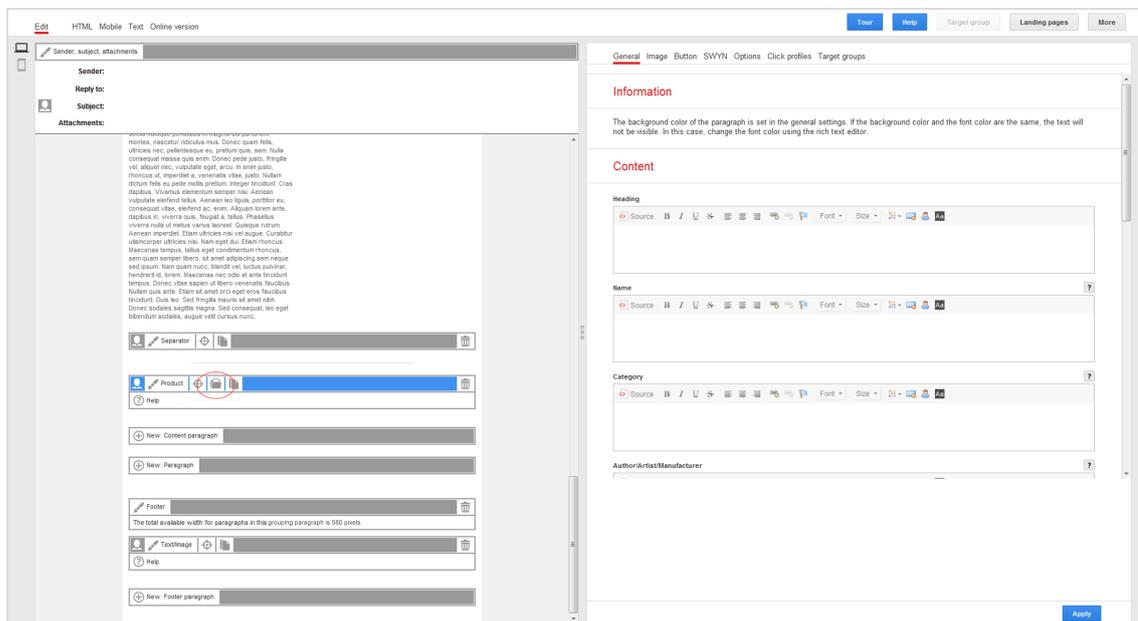
5. In the **Content element** box, enter the ID of the product offer that you want to load into the Template Kit.
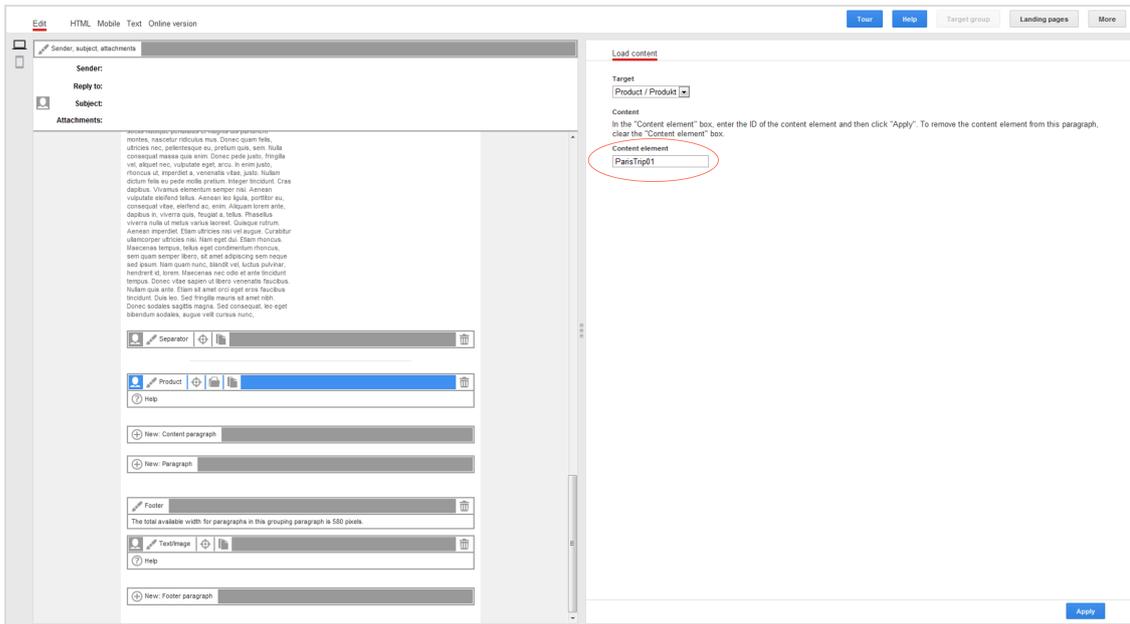
6. On the bottom right of the window, click **Apply**. When the import is completed, the product offer appears on the left of the preview window.

Editing product data

If product offers were loaded from your webspace or server via the content interface into the Template Kit, you can edit them there. The steps for doing this are the same as those processing product paragraphs needing an extension through the content interface. See **Product paragraph**.

> **Tip:** If you use product paragraphs with an extension through the content interface, you should make changes to product offers in your system and update the product paragraphs in the Template Kit by loading the changes. This ensures that your product offers are up to date and that no outdated, modified content is loaded into the Template Kit later. To update a product paragraph, click **Content interface** in the menu bar of the product paragraph, then **Apply**.

> **Warning:** The product paragraph with the content interface can be configured by customer support so that your product offers are automatically updated on the ship date. This option is useful if your products' prices often change between the time of message creation and shipping. If this option is configured for you, any changes to your product offers must be made on your system. If you only perform changes in

> the Template Kit, they are overwritten on the shipping date with the old content from your webspace or server.

Editing HTML layouts

The product paragraph with the content interface provides a standard layout for formatting offer text and images.

> **Note:** To receive an alternate layout customized to your products and services, contact customer support.

Standard layout

You can change the order of components in your product offer in the standard layout. For example, you can determine whether the current price should be shown first followed by the old one, or whether the product manufacturer should appear before the product category.

To change the order of product offer components in a standard layout, perform the following steps:

1. In the Template Kit, click **Settings**. The settings window opens on the right.
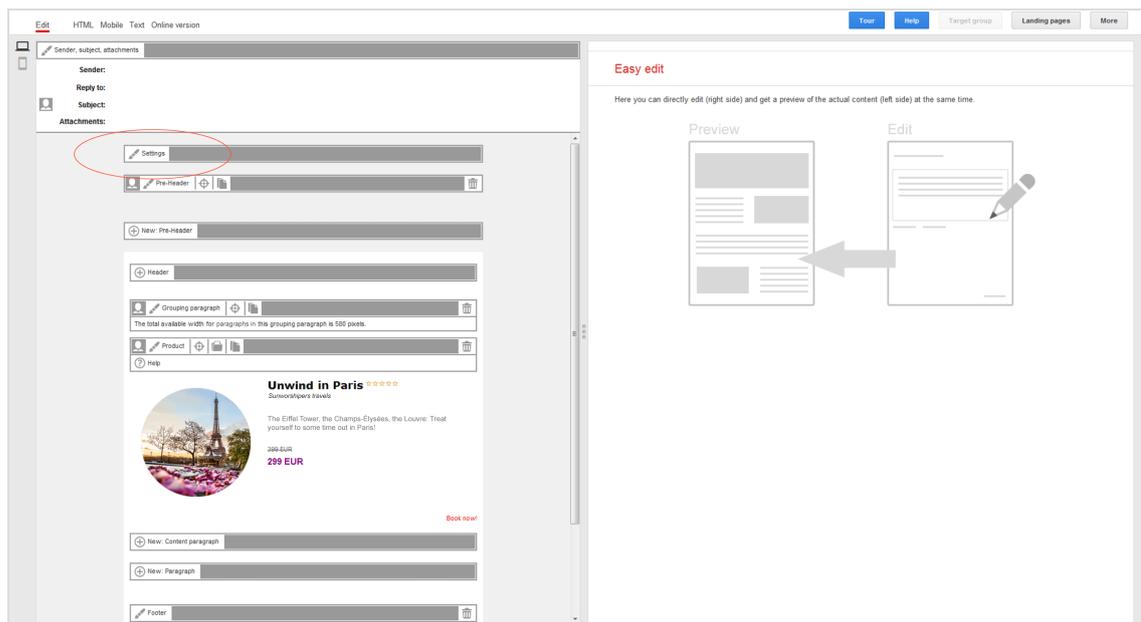
2. Click the **Products** tab.

3. In the **Order** area, determine the order of product offer components by selecting from drop-down lists.
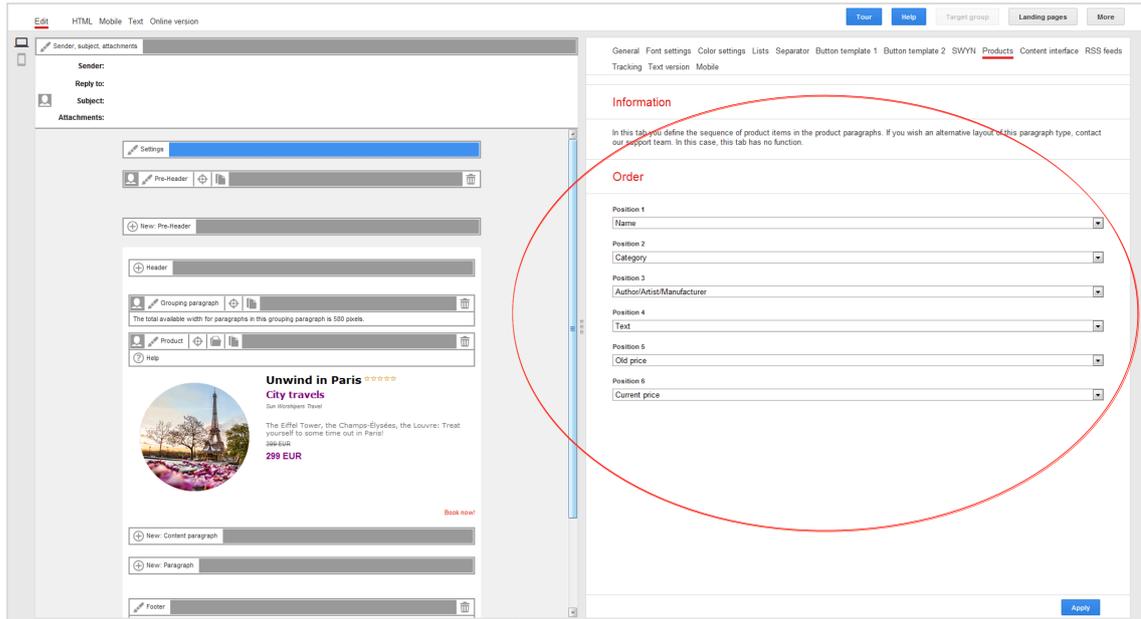
Standard layout example
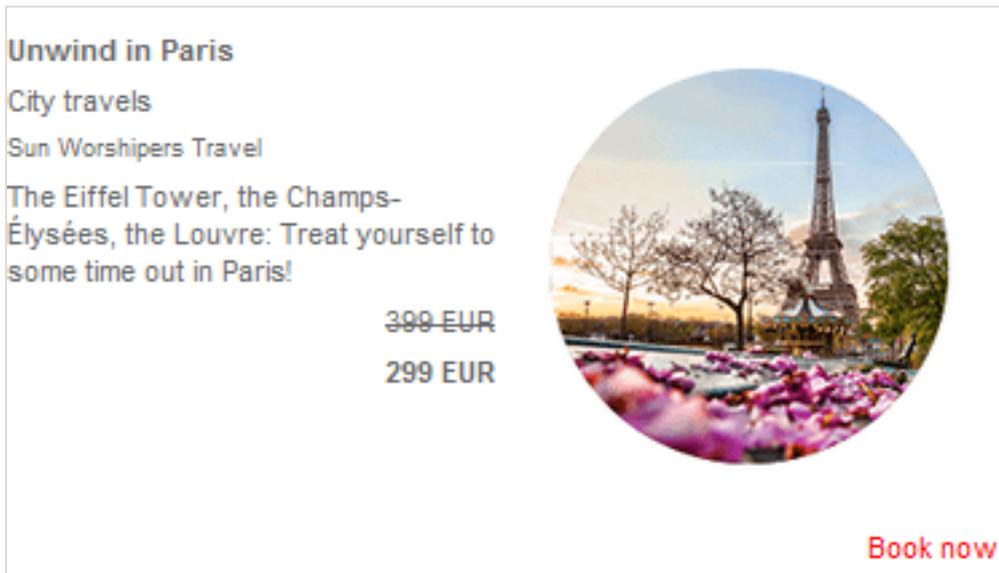
Alternate Layout

If customer support sets up an alternate layout, product offers are formatted according to its specifications. You cannot change the order of components in an alternate layout. To change an alternate layout, contact customer support.

> **Tip:** If an alternate layout is set up, you cannot access the standard layout.

Alternate layout example

Troubleshooting product paragraph with content interface

Issue	Possible cause	Solution
Product data not loading	Product ID is entered incorrectly.	Enter the correct product ID.
Product data not loading	XML file has a file extension.	Remove the file extension.
Product data not loading	Corresponding product offer no longer exists on your web-	Save the product offer again on your webspace or server.

Issue	Possible cause	Solution
	space or server.	
Product data not loading	Product data saved in wrong directory on server or webspace.	Transfer the product data you are trying to load to the directory indicated when setting up the content interface.
Product data not loading	Directory in which the product data is stored is not available.	- Check whether the directory is reachable only after prior authentication and disable authentication. - Check whether there is a problem with your server or webspace. Try loading product data again later.
Some content not loading. For example, the product image is missing.	Error in XML code you generated.	Correct the XML code.
Special characters not displayed correctly, such as German umlauts.	Incorrect character encoding in XML.	Set encoding of XML file to UTF-8.

> **Tip:** If the problem continues after you try all suggested solutions, contact **customer support**.

Content interface paragraph

The content interface paragraph imports product data, such as offer texts and product images, from your e-commerce system into the **Template Kit**. Whether Episerver Commerce, Magento, in-house software development by your company, or another system, the content interface paragraph is flexible and supports a variety of data sources.

> **Note:** To learn about importing Episerver Commerce data, see Importing and exporting a catalog in the Episerver User Guide.

The technical implementation supports the open XML standard and CSV file format – many data sources support both formats.

Export product data from your data source and let Episerver Campaign process it. In the Template Kit, create a new content interface paragraph with individual items, then import your current product offering with just a few mouse clicks.

Your data source can handle product data either by:

- saving it as static XML files on your webspace or server
- your server generating dynamic XML files when queried
- saving product data as a CSV file on the server (both manually or automatically)

> **Tip:** The content interface paragraph is related to the Product paragraph with a content interface. However, the content interface paragraph is more flexible as it supports both CSV and XML formats. You can use both file formats together. Contact customer support to learn which solution is better for you.

Static and dynamic content

The content interface paragraph supports static and dynamic content.

- **Static content**. Product data is loaded when you create the mailing. The data can then be edited. If you integrate static content, all recipients receive the same content.
- **Dynamic content**. The content is loaded when the message is being sent. You cannot edit content in advance. However, you can send different product recommendations to each recipient. For more information, see Dynamic CSV and XML articles.

> **Tip:** You can use static content with dynamic content in the same mailing. Customer support can advise you about combining content types.

Four paragraph types

There are four paragraph types. Only types enabled in your client appear in the Template Kit.

- Static CSV article
- Static XML article
- Dynamic CSV article
- Dynamic XML article

Setting up the content interface paragraph

To set up the content interface paragraph, contact customer support and provide the following information:

- XML or CSV, or XML and CSV together: Which format do you want for product data?

  - **XML**. In which directory on your webspace or server will you store product data? That directory must allow HTTP requests. If the directory is only accessible with authentication, disable it. You can restrict access to product data to specific IP addresses.
  - **CSV**. What will you call the CSV file to which your product catalog is saved? If you update the product catalog later, you must save that version of the CSV under the name given when setting up the content interface.

- Static content, dynamic content or a combination of both content types: Do you want to send the same content or customized product recommendations to your recipients?

After setup, the **content interface** paragraph type is available in the Template Kit.
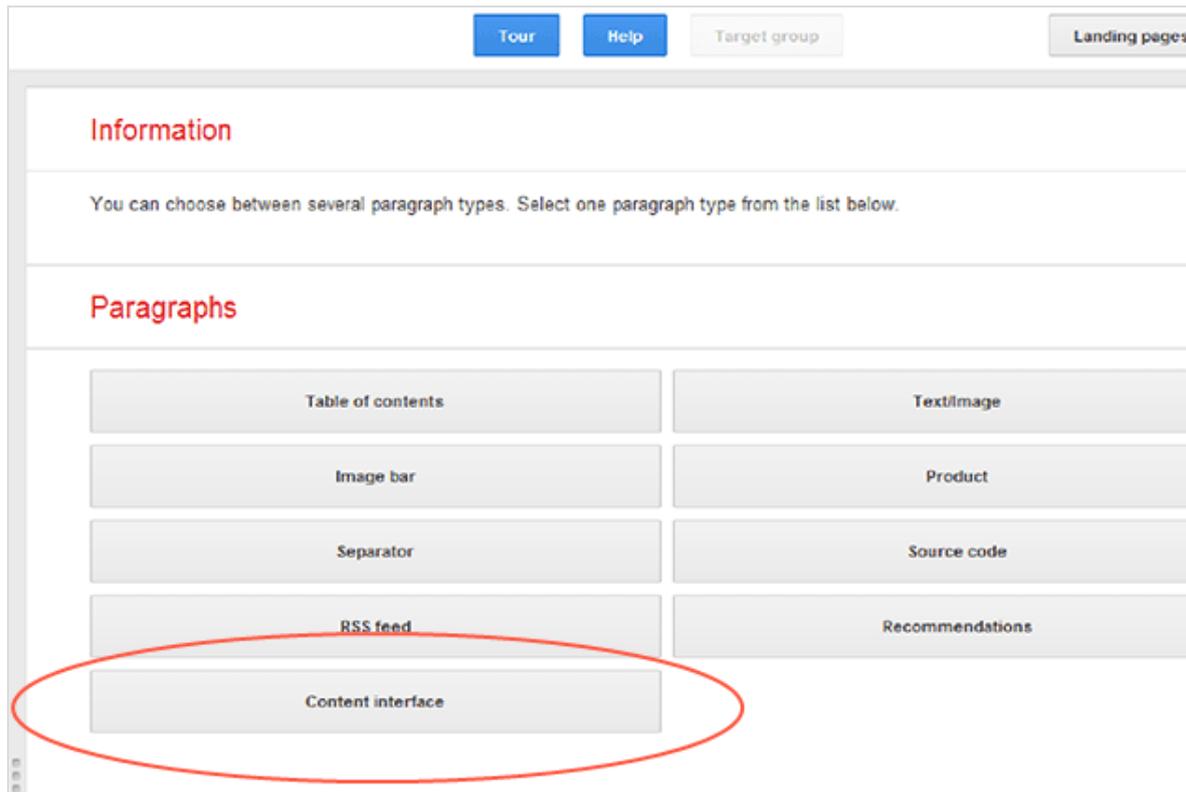
![icon] **Standard values of a product offer**

The content interface paragraph can load the following product data:

1. the product's unique ID (not displayed in the message)
2. up to 10 text elements per product offer, in which you can enter the heading for a product offer, the product description, or the product price
3. up to 3 text links per product offer, such as calls to action (*Buy now*, *Learn more*, and so on)
4. up to 6 product images per product offer (by entering a URL)
   - up to 6 links to product images (one link per image) that direct the recipient to additional information by clicking on the image
   - up to 6 alternative texts for product images in case a recipient cannot load product images and to support accessible messages

   Note: You can also transfer up to 20 additional datasets as metadata for HTML layout program logic.

The following image shows the components of your product offer.
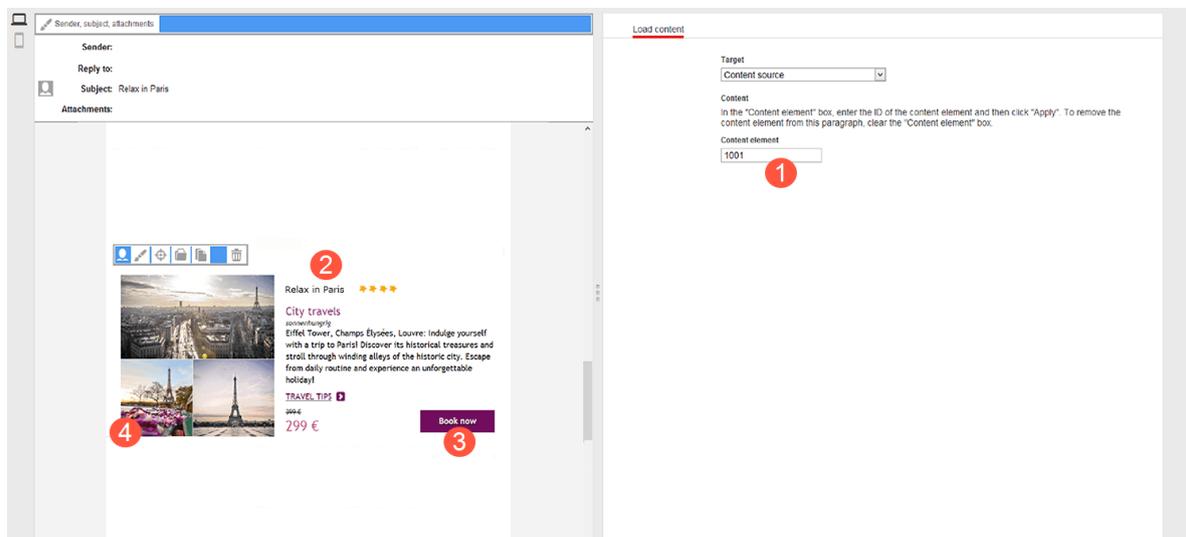
![icon] **Exporting product data with a CSV file**

If you select CSV format, your product data is prepared in two steps:

1. Export product data from your e-commerce system or another data source into a CSV file.
2. Move the CSV file to your personal directory on the server. Episerver Campaign retrieves the CSV file then makes its product data available in the Template Kit.

> **Tip:** If you have a personal directory on the server but no login information, contact customer support to set up a user account.

Export product data from your system as a CSV file. CSV files exported from different systems can differ widely. For example, names and column heading order can be different. Such differences can create problems when importing product data. If no information is provided about what the dataset columns contain (for example, the column that contains the product name), Episerver Campaign cannot read the CSV file properly nor correctly classify the individual datasets.

But, if you use an Episerver integration for one of these e-commerce systems, the content interface can recognize CSV files with different structures and process them correctly:

- Magento

If you use Episerver integration with one of these systems, you can export product data using the Episerver plug-in with no adjustment.

> **Note:** If you do not use an Episerver integration, you must use Episerver Campaign's generic CSV structure.

Generic CSV structure

Episerver Campaign's generic CSV structure standardizes the structure and naming of column headings in CSV files, ensuring the correct import of product data.

If your system/your data source has a feature that supports the export of datasets to a CSV file (such as a plug-in), configure the CSV file with the following structure and column headings:

```
"id";"name";"category";
"text1";"text2";"text3";"text4";"text5";
"text6";"text7";"text8";"text9";"text10";
"link1Text";"link1Url";
"link2Text";"link2Url";
"link3Text";"link3Url";
"image1ImageUrl";"image1AltText";"image1Link";
"image2ImageUrl";"image2AltText";"image2Link";
"image3ImageUrl";"image3AltText";"image3Link";
"image4ImageUrl";"image4AltText";"image4Link";
"image5ImageUrl";"image5AltText";"image5Link";
"image6ImageUrl";"image6AltText";"image6Link";
"additionalData1";"additionalData2";"additionalData3";"additionalData4";"additionalData5";
"additionalData6";"additionalData7";"additionalData8";"additionalData9";"additionalData10";
"additionalData11";"additionalData12";"additionalData13";"additionalData14";"additionalData15";
"additionalData16";"additionalData17";"additionalData18";"additionalData19";"additionalData20";
```

> **Tip:** Configuring an export feature generally requires programming.

> **Warning:** When configuring the export feature, observe the following:
>
> - The CSV file must be RFC-compliant. Technical notes are contained in [RFC 4180](#).
> - Set character encoding for the CSV file to UTF-8 without BOM.
> - Use the semicolon (;) as a separator.
> - If some product data includes quotation marks (inverted commas), mask them with escape characters. Use the quotation mark **"** as the escape character. If you do not mask quotation marks, they are misinterpreted as code, and the product data import fails.
>
>   Example: You surround a word or a word group with quotation marks, such as "Savoir Vivre." In your CSV file, wrap the quoted text with double quotation marks: ""Savoir Vivre"". The outer quotation marks are recognized as escape characters so are not displayed in the message text.

Creating a CSV file manually

If your system/your data source does not have a feature for exporting product datasets to a CSV file, and you want to manually create a CSV file with product data, perform the following steps:

1. Download the template for the generic CSV structure here: **template generic structure.csv**
2. Open the template using a spreadsheet program, such as Microsoft Excel or LibreOffice Calc.
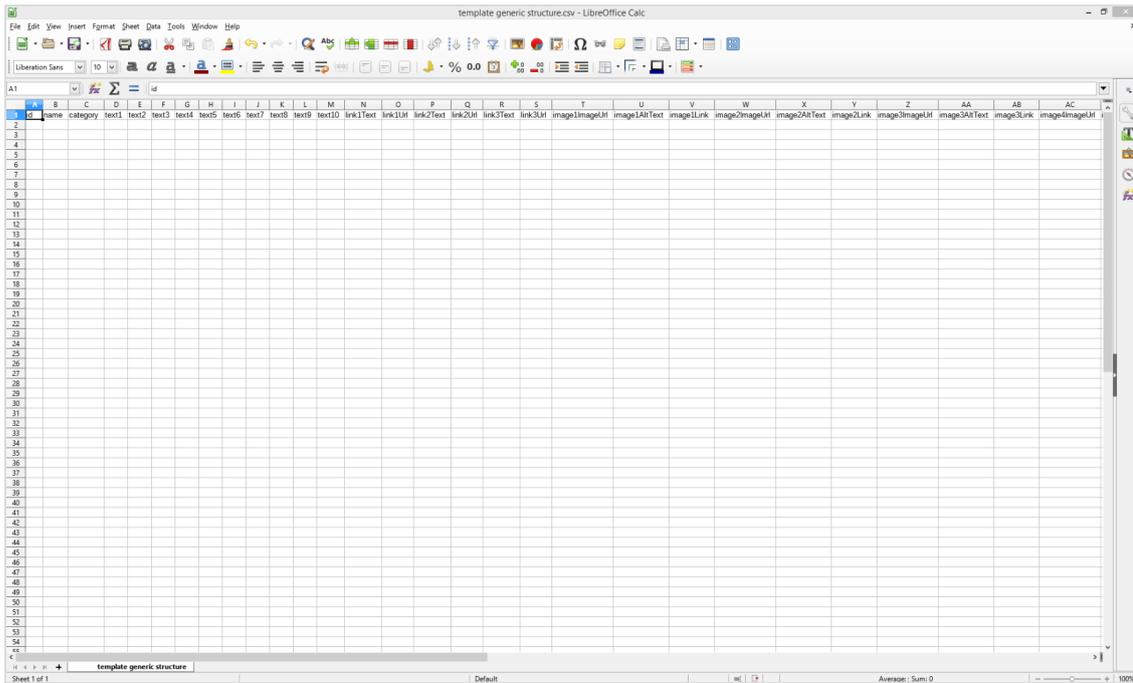
> **Note:** When opening the template, if you need to enter a separator, select **semi-colon**. If you need to specify character encoding, use **UTF 8 without BOM**. Some programs, such as Microsoft Excel, do not provide **UTF-8 without BOM**. In that case, select **UTF-8**.

> **Warning:** When filling out the template in the generic CSV structure, you must observe the following:
>
> If some product data includes quotation marks (inverted commas), mask them with escape characters. Use the quotation mark **"** as the escape character. If you do not mask quotation marks, they are misinterpreted as code, and the product data import fails. Example: You surround a word or a word group with quotation marks, such as "Savoir Vivre." In your CSV file, wrap the quoted text with double quotation marks: ""Savoir Vivre"". The outer quotation marks are recognized as escape characters so are not displayed in the message text.

3. Begin entering product data in row 2. Enter the data for each product side by side (see image).

> **Warning:** Do not change the column headings or their order in row 1. If you do, your product data cannot be loaded into the Template Kit.
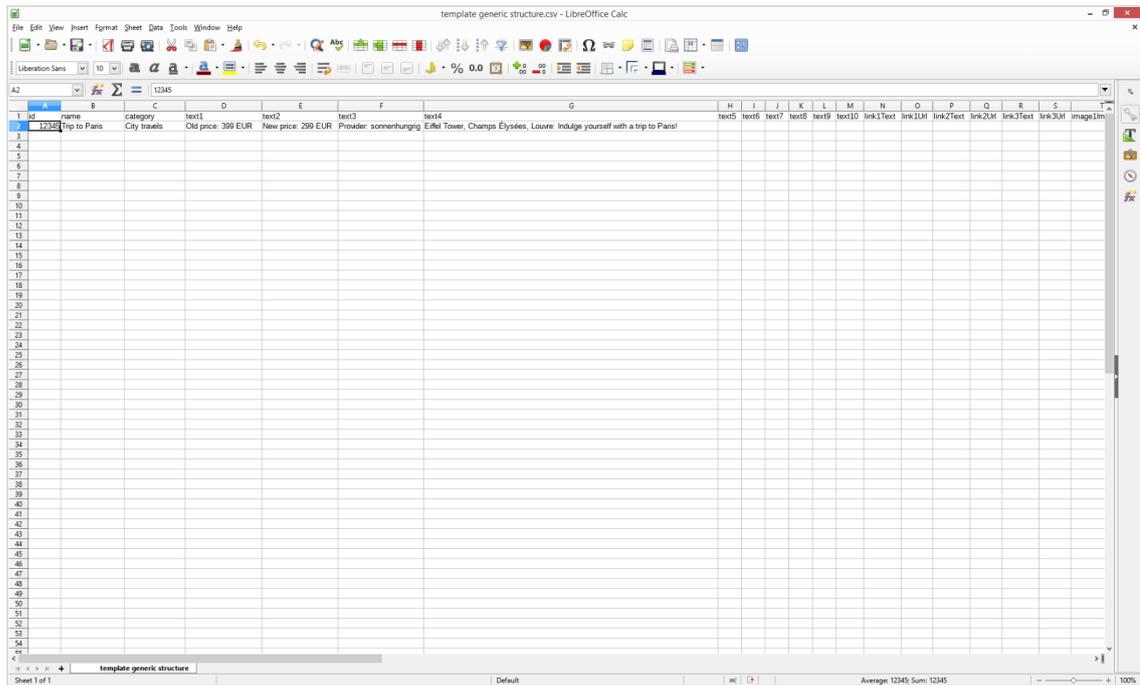
To add another product offer, insert the data again side-by-side in the next row (see image).

Template column heading	Product data to enter
id	Enter the unique product ID. It is not shown in your messages. You may only enter a product ID in the document once.
name	Enter a name for your product offer. Later, in the Template Kit, you can select the product offer by its name to include it in your messages (static CSV article only). It is not shown in your messages.
category	Enter the product category. It is not shown in your messages. With the product category, you can create overview category trees in the Template Kit and compile related products together to find specific products (static CSV article only). Enter the subcategories in this field, separated by hash symbols. Example: Mediterraneantravel#Italy#Sicily Note: A category may have up to 10 sub-categories.

Template column heading	Product data to enter
text1 - text10	Up to 10 text fields are available. Enter one piece of information in each field. For example: • the heading for your product offer, such as **text1** in the text field • the name of the product to be shown in your message, such as **text2** in the text field • the description of your product, such as **text3** in the text field • the old price of your product, such as **text4** in the text field • the current price of your product, such as **text5** in the text field • the supplier/manufacturer of your product, such as **text6** in the text field You can choose what you want to enter in the text fields. Adapt the content according to your wants and the requirements of your product/your service. It may be best to organize product offer components sequentially from **text1** through **text10**, which is how they are shown from top to bottom in the finished product offer. If you are not sure of the best order, contact customer support. The formatting (text size and text color) of the text field content is set later using an HTML layout.
link1Text - link3Text	Enter the heading for the link or links to your product offer. For example: *Offer*, *More Information* or *Buy Now*.
link1Url - link3Url	Enter links to pages to which recipients are directed if they click a link (such as the corresponding product page in your webshop).
image1ImageUrl - image6ImageUrl	Enter the URLs for the corresponding product images. The images are loaded by Episerver Campaign and displayed in your messages.
image1AltText - image6AltText	Enter alternative text for images. This text appears if an image cannot be loaded.
image1Link -	Enter a link to the product image. If the image is clicked, the recipient is for-

Template column heading	Product data to enter
image6Link	warded to the link target. This can be your webshop or another address that you want to connect to the image. Avoid mixing up **ImageLink** with **ImageURL**, which indicates the saved location of the image.
additionalData1 - additionalData20	Enter additional data records that you can use, such as metadata for the program logic of the HTML layouts.

4. Save and rename the file.

> **Warning:** Give the file the name you entered for your CSV file when setting up content interface paragraphs. If you use a different name, the product data import will fail. If you forgot the name, contact customer support.

> **Note:** When saving the file, make sure the spreadsheet program does not assign a new file type. The file must have the file type CSV or file extension .csv.

Transferring the CSV file to the Episerver server

After you save the completed and renamed CSV template, transfer it to your personal directory on the Episerver server.

> **Tip:** If you use an Episerver integration for Magento, or OXID, the transfer is automatic. If you do not use an Episerver integration, but want to automate the transfer, use a script. Consult your system administrator or software service provider for a programming solution.

To transfer the completed and renamed Episerver template in your directory to the Episerver server, perform the following steps:

1. Log in to the Episerver server with your user data.

> **Tip:** If you do not have a user account for the Episerver server, contact customer support. See FTP API (Windows) for information about logging in to the

Episerver server; see **FTP API (macOS/OS X)** for macOS.

2. Upload the Episerver template to your personal directory on the Episerver server.

> **Warning:** If you have multiple directories on the Episerver server, save the template in the directory set up for your CSV files during the configuration of the content interface. If you save the template to another directory, your product data import fails.

After you load the completed and renamed template into the correct directory, your current product offers are available in the Template Kit for integration into your messages.

> **Note:** It can take some time for your product offers, transferred as a CSV file, to be available in the Template Kit. You should automatically perform the data transfer at night.

Loading and editing static **CSV** product data

If you saved product data as a CSV file in your personal directory on the Episerver server, you can load product offers into your messages and **edit** them as necessary in the **Template Kit** (within a content interface article). See **general settings** to change content interface paragraph settings. To integrate dynamic product data into the Template Kit, see **Dynamic CSV and XML articles**.

Loading product data

1. While editing a message in the Template Kit, click **New: Content paragraph**. A window for selecting paragraph type opens on the right.
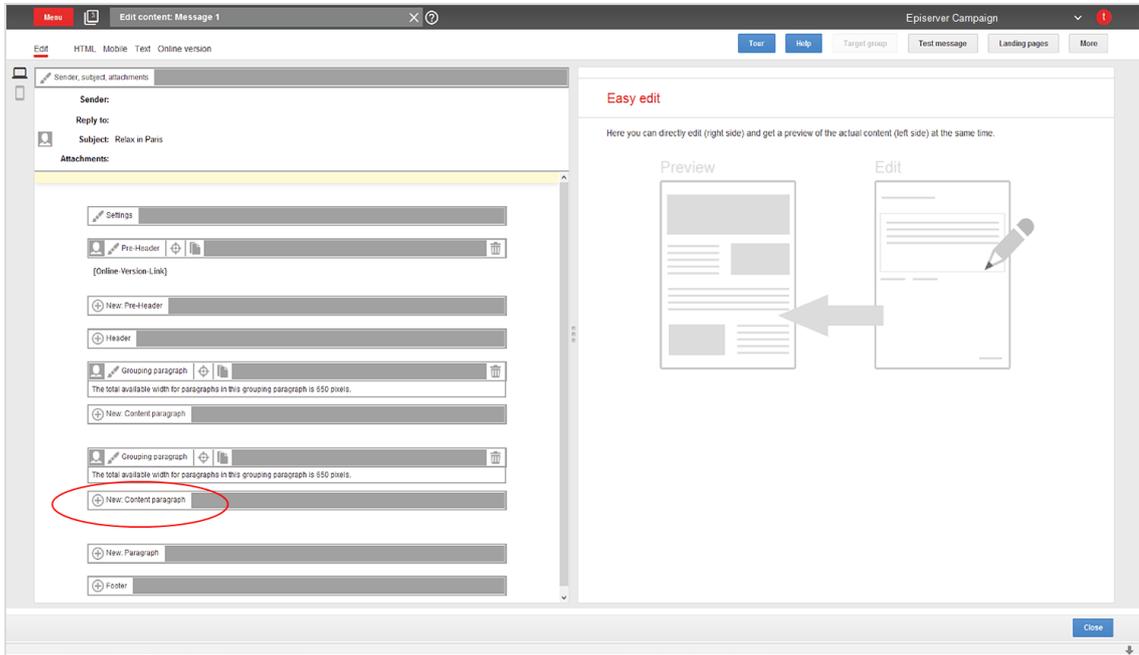
2. Click **Content interface**. Its configuration window opens.
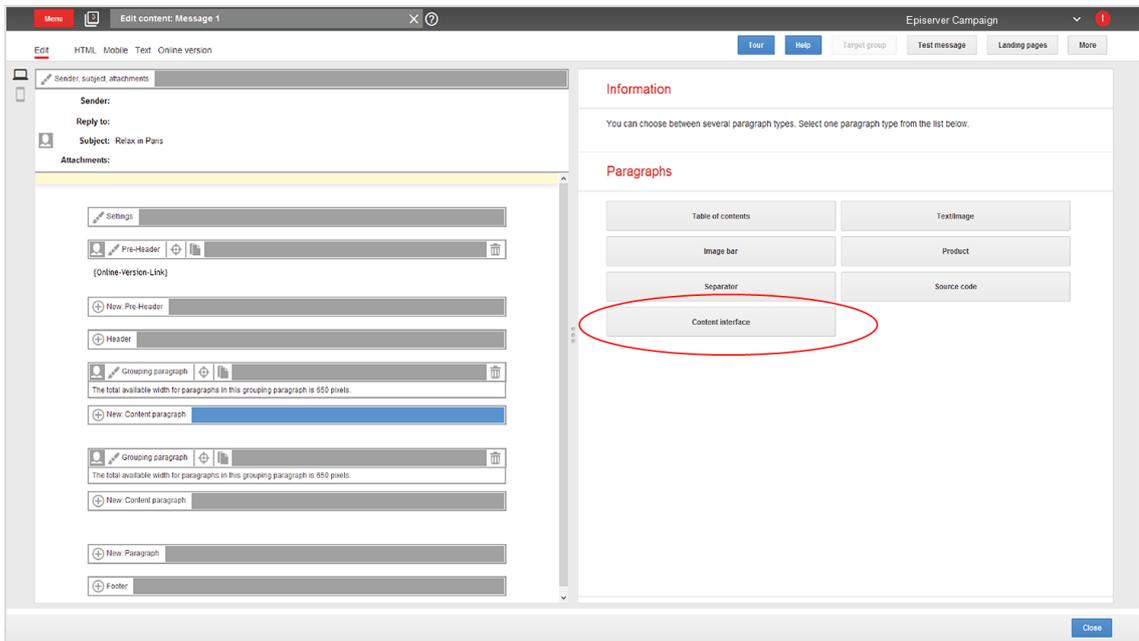
3. Change no settings in the configuration window. Click **Apply**. The new paragraph appears on the left in the preview window, and the **Content interface article** button appears below the new paragraph.

Tip: Your product offers are created as content interface articles, which are sub-paragraphs of the content interface paragraphs.
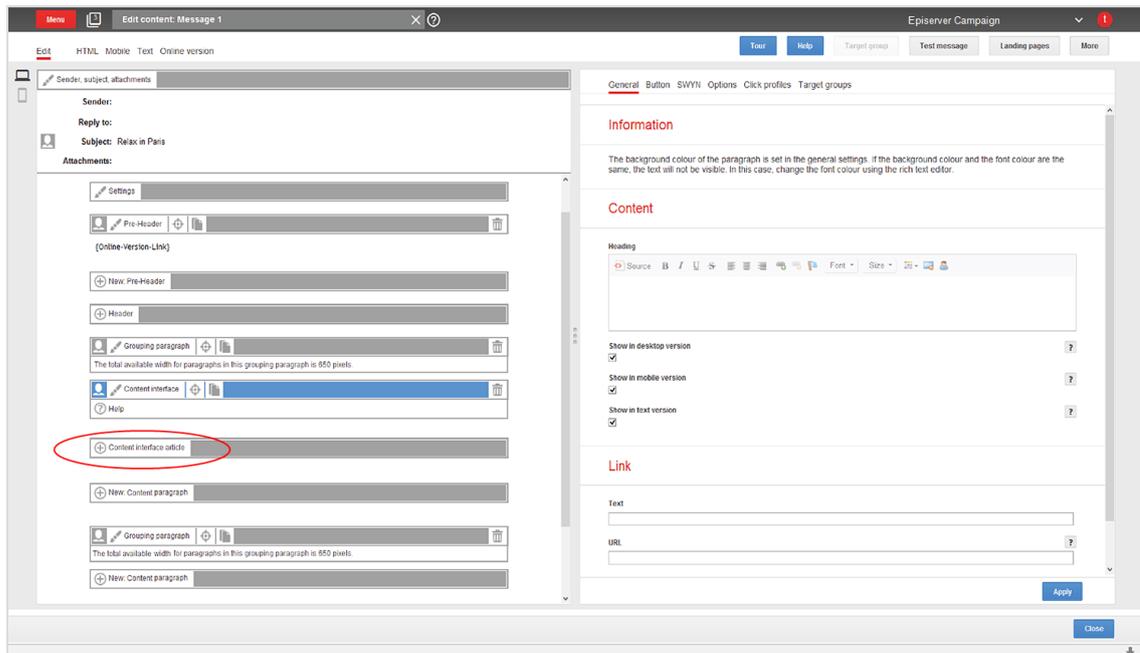
4. Create a new content interface article by clicking **Content interface article** on the left. The configuration window for that article opens.

5. Change no settings in the configuration window. Click **Apply**. To the left of the preview window, the menu for the content interface article expands to include the button **Content interface** .

6. Click **Content interface** 🗀. The **Load content** window opens on the right.
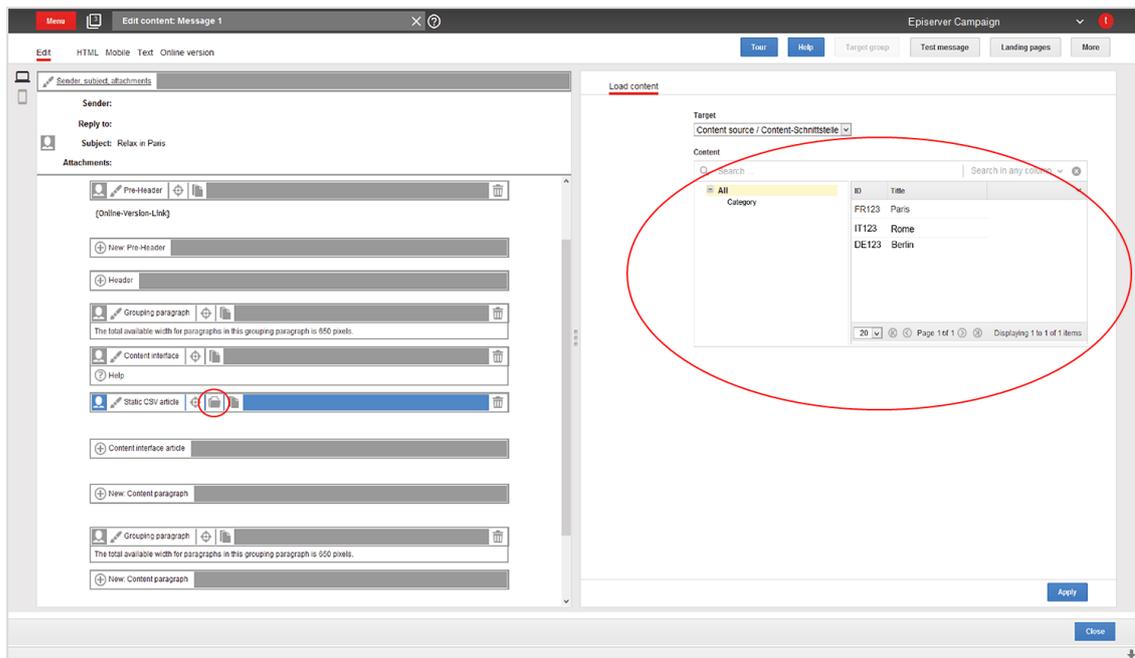
7. In the list, select the product offer to load into your message and click **Apply**. When the loading is complete, the product offer appears on the left of the preview window.

> **Tip:** To load additional product offers, create a new content interface article for each additional offer.

Editing product data in content interface article

Once your product offer is loaded into your message, you can edit the offer in the Template Kit. To do this, perform the following steps:

1. On the left of the preview window, in the menu for the corresponding content interface article, click **Static CSV article**. The configuration window for that article opens.
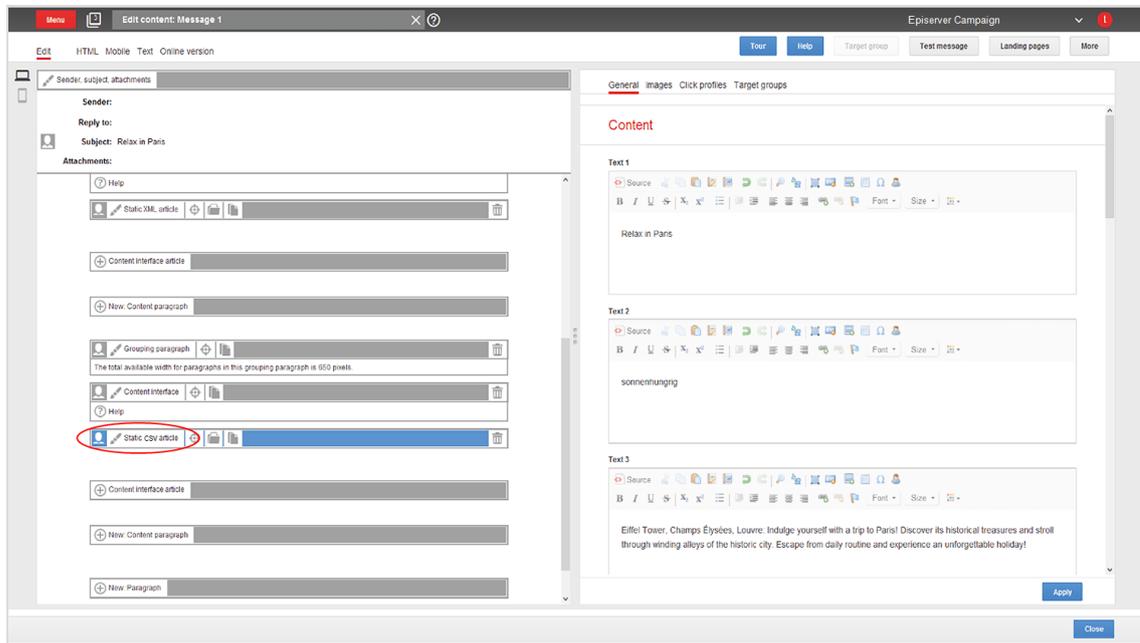
2. Make your changes and click **Apply**.

> **Warning:** Do not change the layout template if you lack advanced HTML and
> CSS skills. Doing so can lead to errors, which means that your product offers will
> not display properly. If you want to modify the layout template but lack HTML
> and CSS skills, contact customer support.

Edit the content of your product offers in the CSV file. Then, re-upload the modified CSV file to the server.
This ensures that your product offers are up-to-date and that no old, subsequently modified content in
the CSV file is loaded into the Template Kit.

To update an existing content interface article, go to the article's menu bar, click **Content interface** 📁,
select the appropriate product offer again, and click **Apply**.

> **Warning:** Customer support can configure the content interface paragraph so
> that product offers are updated at dispatch by comparing it with your CSV file. If
> this option is configured, changes to product offers must be made in the CSV file.
> If you only make changes in the Template Kit, they are overwritten at dispatch
> with old content from the CSV file.

Using XML

You can use the XML format for the content interface paragraphs. If you choose XML (Extensible Markup Language), do not save your product data with the CSV solution on the Episerver server. Instead, Episerver Campaign retrieve product data from your webspace or server using a HTTP request.

When the request is made, your product data must:

- exist on your webspace or server as an XML file (static product data)

  or

- be generated dynamically in an XML format (dynamic product data)

> **Tip:** Your company's environment determines whether you import static or dynamic product data. Contact your system administrator to learn which implementation is in use.

Saving static product data on the server

To save product data statically as XML files on your webspace or server, each product must be saved in an XML file. You cannot group multiple products into a single XML file. To save a product as an XML file, perform the following steps.

1. Open a text editor, such as Notepad (Windows) or Textedit (macOS/OS X).
2. Create a new document.

> **Warning:** Set your text document to use UTF-8 character encoding. If you use another encoding, the text may not be represented properly.

3. Copy the following code into your document.
   Code to copy

```xml
<?xml version="1.0" encoding="UTF-8"?>
<element>
<property name="id">123456</property>
<property name="text1"><![CDATA[<b>Text field 1</b>]]></property>
<property name="text2"><![CDATA[Text field 2]]></property>
<property name="text3"><![CDATA[Text field 3]]></property>
<property name="text4"><![CDATA[Text field 4]]></property>
<property name="text5"><![CDATA[Text field 5]]></property>
<property name="text6"><![CDATA[Text field 6]]></property>
<property name="text7"><![CDATA[Text field 7]]></property>
```

```
<property name="text8"><![CDATA[Text field 8]]></property>
<property name="text9"><![CDATA[Text field 9]]></property>
<property name="text10"><![CDATA[Text field 10]]></property>
<property name="link1Text"><![CDATA[Text for link 1]]></property>
<property name="link1Url"><![CDATA[URL for link 1]]></property>
<property name="link2Text"><![CDATA[Text for link 2]]></property>
<property name="link2Url"><![CDATA[URL for link 2]]></property>
<property name="link3Text"><![CDATA[Text for link 3]]></property>
<property name="link3Url"><![CDATA[URL for link 3]]></property>
<property name="image1ImageUrl"><![CDATA[Image URL for image 1]]></property>
<property name="image1AltText"><![CDATA[Alternative text for image 1]]></property>
<property name="image1Link"><![CDATA[Link for image 1]]></property>
<property name="image2ImageUrl"><![CDATA[Image URL for image 2]]></property>
<property name="image2AltText"><![CDATA[Alternative text for image 2]]></property>
<property name="image2Link"><![CDATA[Link for image 2]]></property>
<property name="image3ImageUrl"><![CDATA[Image URL for image 3]]></property>
<property name="image3AltText"><![CDATA[Alternative text for Image 3]]></property>
<property name="image3Link"><![CDATA[Link for image 3]]></property>
<property name="image4ImageUrl"><![CDATA[Image URL for image 4]]></property>
<property name="image4AltText"><![CDATA[Alternative text for image 4]]></property>
<property name="image4Link"><![CDATA[Link for image 4]]></property>
<property name="image5ImageUrl"><![CDATA[Image URL for image 5]]></property>
<property name="image5AltText"><![CDATA[Alternative text for image 5]]></property>
<property name="image5Link"><![CDATA[Link for image 5]]></property>
<property name="image6ImageUrl"><![CDATA[Image URL for image 6]]></property>
<property name="image6AltText"><![CDATA[Alternative text for image 6]]></property>
<property name="image6Link"><![CDATA[Link for image 6]]></property>
<property name="additionalData1"><![CDATA[Additional information 1]]></property>
<property name="additionalData2"><![CDATA[Additional information 2]]></property>
<property name="additionalData3"><![CDATA[Additional information 3]]></property>
<property name="additionalData4"><![CDATA[Additional information 4]]></property>
<property name="additionalData5"><![CDATA[Additional information  5]]></property>
<property name="additionalData6"><![CDATA[Additional information 6]]></property>
<property name="additionalData7"><![CDATA[Additional information 7]]></property>
<property name="additionalData8"><![CDATA[Additional information 8]]></property>
<property name="additionalData9"><![CDATA[Additional information 9]]></property>
<property name="additionalData10"><![CDATA[Additional information 10]]></property>
<property name="additionalData11"><![CDATA[Additional information 11]]></property>
<property name="additionalData12"><![CDATA[Additional information 12]]></property>
<property name="additionalData13"><![CDATA[Additional information 13]]></property>
<property name="additionalData14"><![CDATA[Additional information 14]]></property>
<property name="additionalData15"><![CDATA[Additional information 15]]></property>
<property name="additionalData16"><![CDATA[Additional information 16]]></property>
<property name="additionalData17"><![CDATA[Additional information 17]]></property>
<property name="additionalData18"><![CDATA[Additional information 18]]></property>
<property name="additionalData19"><![CDATA[Additional information 19]]></property>
<property name="additionalData20"><![CDATA[Additional information 20]]></property>
</element>
```

> **Note:** The following steps guide you through customizing this code for your setup. Only product ID (in code, the property **id**) is mandatory. Other values are optional. Delete any unused values.

4. In the first property row, enter the product ID . Insert your product ID between the brackets.

   Example: Your product has the product ID "FR123". `<property name="id">FR123</property>`

> **Note:** Use only alphanumeric characters (letters and numbers) in the product ID. If you use special characters, you may encounter problems importing product data.

> **Tip:** In all steps below, you insert the value between brackets, after **CDATA**.

5. In the 2nd through 11th property rows (**text1** through **text10**), enter up to ten text elements for your product offer. "Text field 1", "Text field 2", "Text field 3" and so on are entered as placeholders for your text elements.

   The text elements can include things such as the heading for the product offer, the product name, the product category, the product description, the old price, the current price, the manufacturer/supplier, and so on. Adapt the content to your needs and your product or service's requirements.

   Example: The header of the product offer is: *Relax in Paris*. `<property name="text1"><![CDATA[Relax in Paris]]></property>`

   > **Tip:** It is best to organize product offer components sequentially, from **text1** through **text10**, which is how they are shown in the finished product offer. If you are not sure what order is best for you, contact [customer support](). The formatting (text size and text color) of the text field content is set separately using an HTML layout.

6. In the 12th property row, enter the heading for the link to your product offer. For example: *Offer*, *More Information* or *Buy Now*.

   Example: The link text is: *Book now*. `<property name="link1Text"><![CDATA[Book now]]></property>`

7. In the 13th property row, enter the URL that leads to the product page in your webshop.

   Example: The URL of the product page is http://www.sonnenhungrig.com/paris: `<property name="link1Url"><![CDATA[http://www.sonnenhungrig.com/paris]]></property>`

8. In the property rows 14 through 17, if your product offer needs more than one link, enter two additional links and link texts. Enter the information as specified in steps 6 and 7.

   > **Tip:** Example: Next to the link to the booking page for the Paris trip, another link leads to the current weather in Paris.

9. In the 18th property row enter the URL to the product image. Episerver Campaign loads the product image using that URL and shows it in your message.

   Example: The URL of the product image is "http://www.sonnenhungrig.com/eiffeltower.jpg". `<property name="image1ImageUrl"><![CDATA[http://www.sonnenhungrig.com/eiffeltower.jpg]]></property>`

10. In the 19th property row, enter the alternative text for your product image. An alternative text is the text that is shown when an image cannot be loaded. Enter alternative texts, because visually impaired people can read these using special programs, promoting an accessible Internet.

    Example: The alternative text for your product is "The Eiffel Tower in Paris in springtime". `<property name-e="image1AltText"><![CDATA[The Eiffel Tower in Paris in springtime]]></property>`

11. In the 20th property row, enter a URL for the product image. If a recipient clicks on the image, he or she is led to the associated URL. This can be your webshop or also any other address that you want to connect to the image.

    > **Warning:** To display the image in messages, be certain that you are using the **ImageURL**, which indicates the image's saved location. The **ImageLink**, on the other hand, directs the recipient to the link target, which has additional information.

    Example: The URL associated with your product image is: "http://www.sonnenhungrig.com/sightsinfrance". `<property name="image1ImageUrl"><![CDATA[http://www.sonnen-hungrig.com/sightsinfrance]]></property>`

12. In the property lines 21 through 35, up to five additional URLs for the locations where the product images are stored can be entered, and five additional alternative texts and five additional links that direct the recipient to the link target when clicked. This means: Up to six product images, each with an alternative text and a link can be associated with each product offer. Enter the information as specified in steps 9 and 11 of this manual.

13. In the property lines 36 to 55, enter additional data records that you can use, such as metadata for the program logic of the HTML layouts.

14. Save the text document. For the file name, use the product ID (the value you inserted for the **id** property). For file type, use .xml.

15. Delete the document's file extension. For example, if the document is named *ParisTrip01.xml*, rename the file as *ParisTrip01*.

    > **Warning:** If you do not remove the file extension, your product data cannot be loaded.

16. Save the document in your webspace or on your server in the directory that you communicated for the setup of the product paragraph with content interface.

    > **Warning:** Do not change the location of the product description documents without consulting [customer support](). If you change directories without consulting customer support, you cannot load product data using the content interface.

When you have saved your text document in your webspace or on your server, you can access your product offer in the Template Kit. Follow the individual steps in the Static XML article section to upload your product offer into the Template Kit using the content interface.

Generating dynamic product data on the server

The preparation of dynamic product data generally follows the same scheme as static product data, but the XML files are not prepared manually. Instead, they are loaded from a database when called (by HTTP request) via the content interface and automatically generated as XML. Your company needs to program this process. To generate dynamic product data, consult your system administrator.

> **Note:** When performing the configuration:
>
> 1. The XML feed must be UTF-8 encoded.
> 2. The product ID must be positioned at the end of the URL.
>
>   Correct: `http://request.example.com/product?id=123456789`
>
>   Incorrect: `http://request.example.com/product/123456789/data`

Loading and editing static XML product data

When your product data is available as XML files in your webspace or on your server, you can load the data into the Template Kit, then edit it. See general settings to change content interface paragraph settings. If you want to integrate dynamic product data into the Template Kit, see Dynamic CSV and XML articles.

Loading product data

1. In the Template Kit, click **New: Content paragraph**.
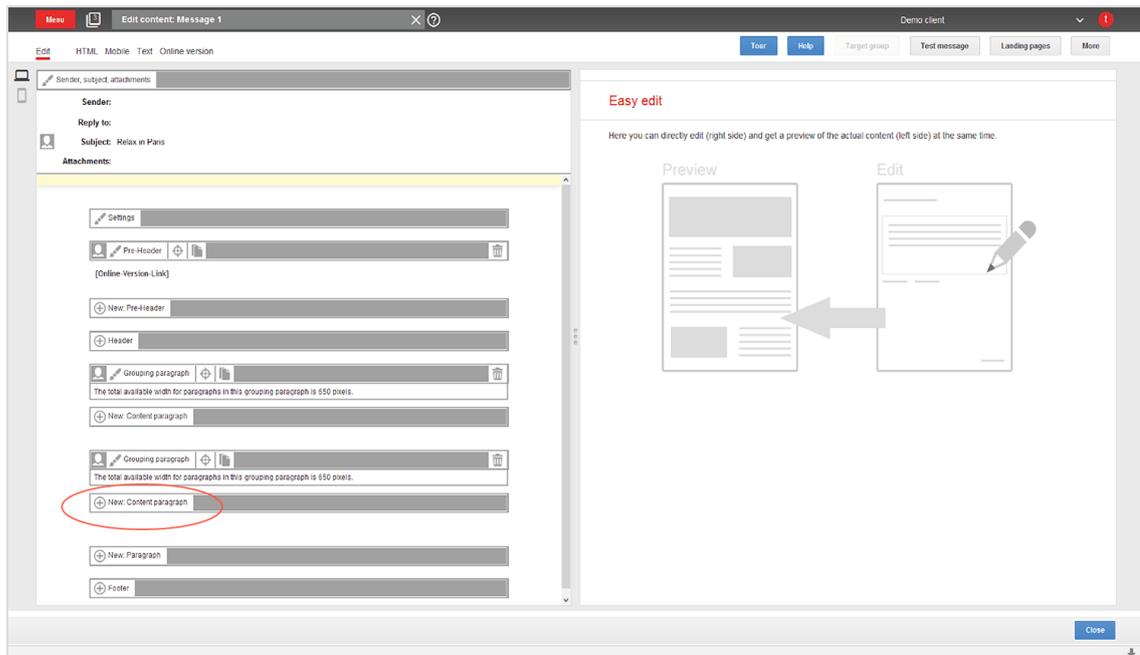
2. Click **Content interface**. The configuration window for the selected paragraph type opens.
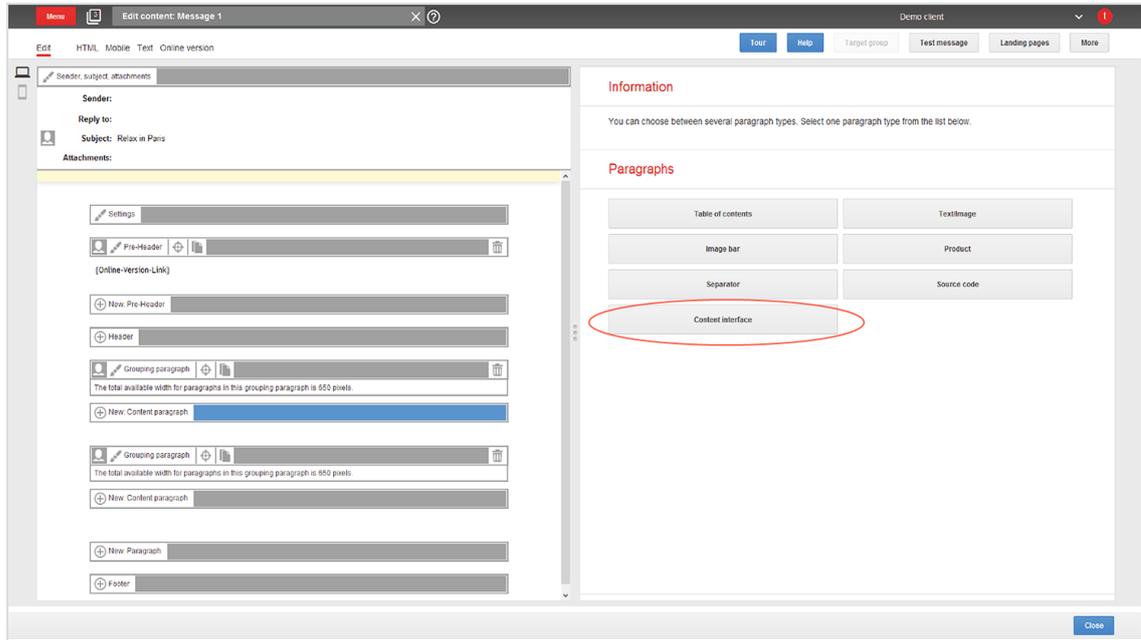
3. Do not change settings in the configuration window. Click **Apply**. The new paragraph appears on the left, in the preview window.

> **Tip:** Product offers are created as content interface articles, which are sub-paragraphs of content interface paragraphs.
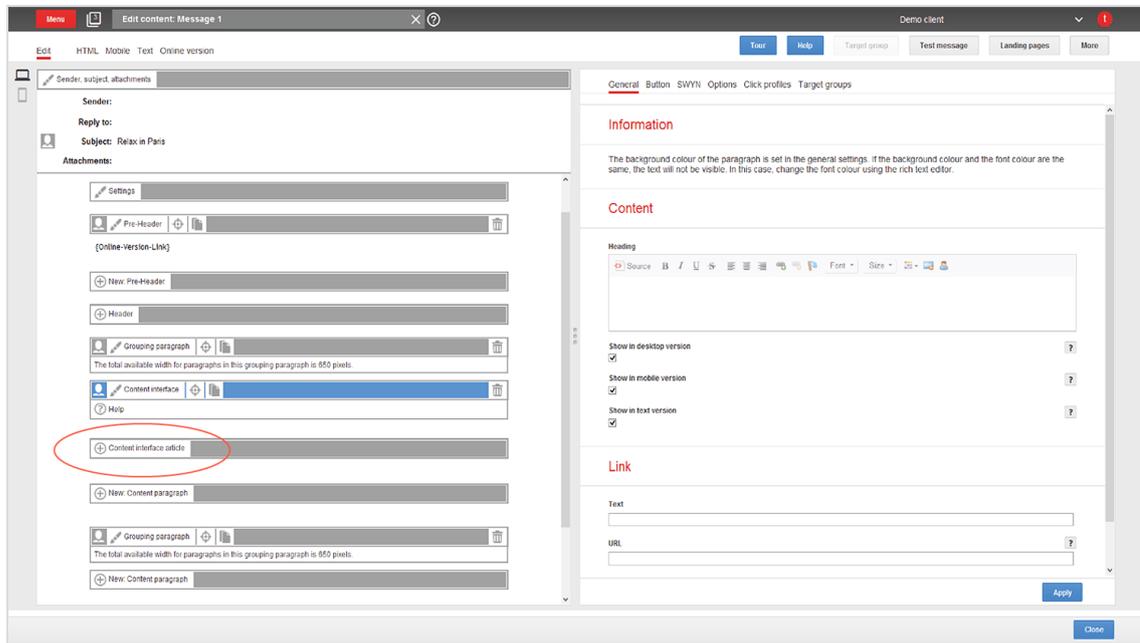
4. Create a new content interface article by clicking **Content interface article** on the left of the preview window. The configuration window opens.

5. Change no settings in the configuration window. Click **Apply**. On the left side of the preview window, the menu bar for the content interface article expands to include the button **Content interface** .

6. Click **Content interface** ▢. The **Load content** window opens on the right.
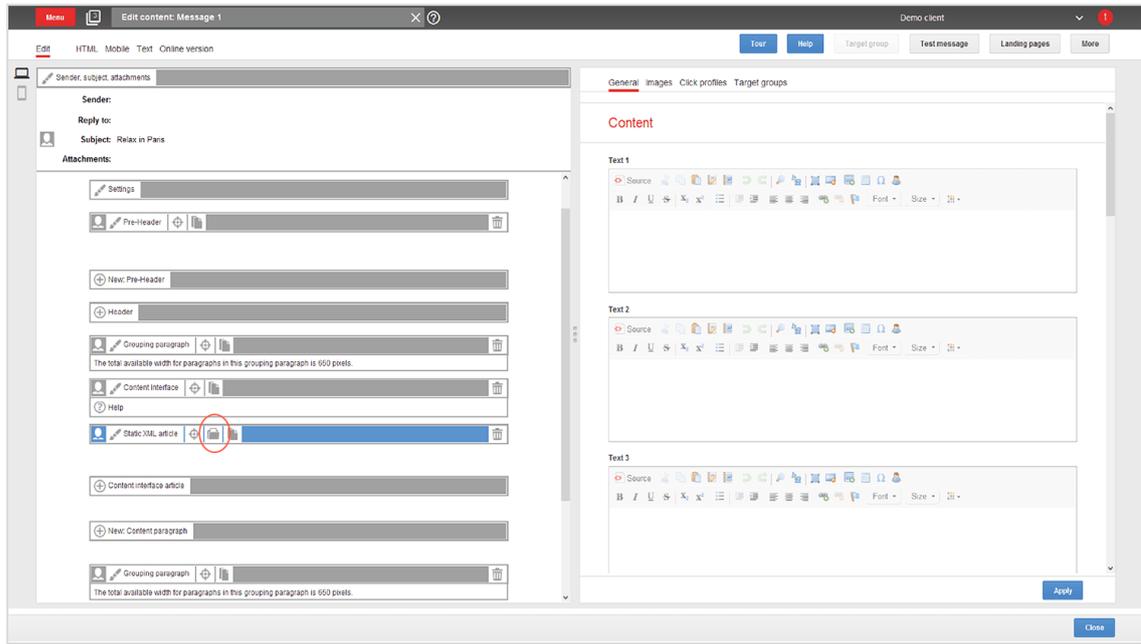
7. In the **Content element** box, enter the ID of the product offer that you want to load into the Template Kit.
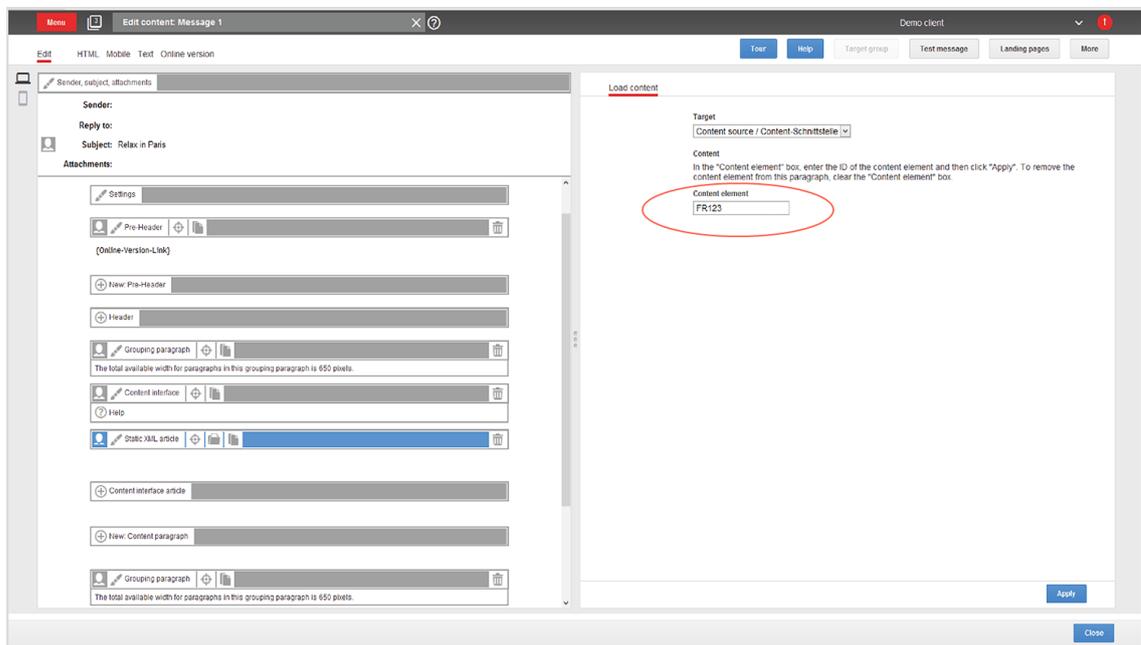
8. On the bottom right of the window, click **Apply**. Your product data is loaded via the content interface from your webspace or your server into the Template Kit. When the import is complete, the product offer appears on the left of the preview window.

Editing XML product data in content interface article

If your product offer is loaded into your message, you can later edit it directly in the Template Kit. To do this, perform the following steps:

1. On the left side of the preview window, in the menu bar for the corresponding content interface article, click **Static XML article**. On the right, a window for selecting the paragraph type opens.
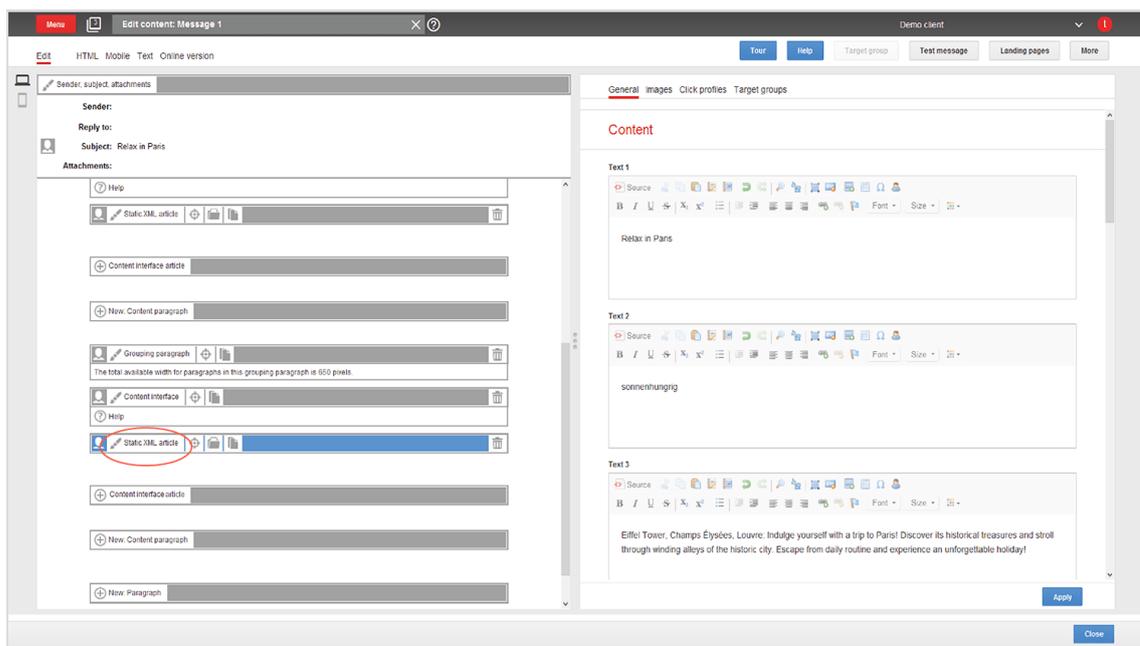
2. Make changes and confirm them by clicking **Apply**.

> **Warning:** Do not change the layout template if you lack advanced HTML and CSS skills. Doing so can lead to errors, which means that your product offers will not display properly. If you want to modify the layout template but lack HTML and CSS skills, contact customer support.

If you update the content of product offers in the XML file, you can re-upload the modified file to the server. This ensures that your product offers are up-to-date and that no old, subsequently-modified content in the XML file is loaded into the Template Kit.

To update an content interface article, open the article's menu bar, click **Content Interface** , enter the corresponding product ID, and click **Apply**.

> **Warning:** [Customer support](#) can configure the content interface paragraph so that product offers are updated at dispatch by comparing it with your CSV file. If this option is configured, changes to product offers must be made in the CSV file. If you only make changes in the Template Kit, they are overwritten at dispatch with old content from the CSV file.

Dynamic CSV and XML articles

You can send personalized product recommendations with dynamic CSV and XML articles. Product data is loaded from the CSV or XML source for each individual recipient while sending.

> **Note:** URLs that reference image files are dynamically inserted into the mailing during dispatch. Ensure that your server can handle a large number of requests when the mailing is sent.

Prerequisites

- Dynamic CSV articles and/or XML items are enabled in your client.
- For CSV product data source, see [Exporting product data with a CSV file](#). For XML source, see [Using XML](#).

Creating a mapping reference

When sending the message, Episerver Campaign uses the product ID from the mapping reference to load product data from the data source. This loads different products into the message for each recipient.

To send a different product to each recipient, create a *mapping reference* that lists product recommendations for each recipient using the product ID. There are two ways to create a mapping reference:

- **Recipient list**. Import the product IDs to be mapped into a recipient list field in your recipient list.
- **Mapping file**. Create a CSV file that contains the recipient ID of each mailing recipient on a separate line. Add to each recipient ID an additional column that specifies the product ID to be mapped.

Structure of the mapping file

A	B
recipient1@example.com	ProductID001

A	B
recipient2@example.com	ProductID002
recipient3@example.com	ProductID003
and so on	and so on

Warning: If you enter several product IDs, leave no space after the separator.

Wrong: `001, 002, 003`

Correct: `001,002,003`

Using a recipient list as a mapping reference

1. Contact customer support, who sets up the recipient list field for mapping product IDs. Up to 256 characters may be transferred to the recipient list field. If you want more, tell customer support.

   Several methods (including CSV file import and SOAP API) are available for importing recipient-specific product IDs to recipient lists.

2. Transfer product IDs to the recipient list.

Using a mapping file as a mapping reference

1. Create a CSV file whose first column contains recipient IDs. Each ID must be on a new line.
2. In the second column, enter the product IDs for each recipient.
3. Transfer the mapping file to the server, in the mapping file location specified when you set up dynamic articles.

   Tip: Alternatively, use the **Upload file** feature, located in the start menu under **Special**. (Contact customer support to enable this feature.)

Creating dynamic CSV and XML articles

1. To create a dynamic CSV or XML article, in the Template Kit, create a new content paragraph by clicking **New: Content paragraph**.
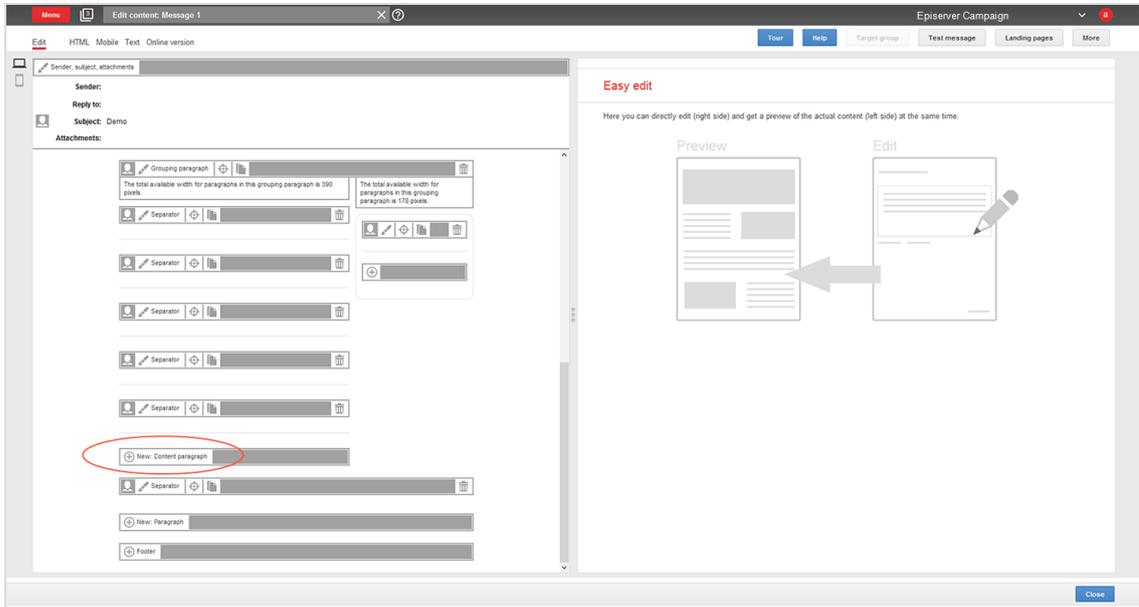
2. Select the content interface paragraph type by clicking **Content interface**.
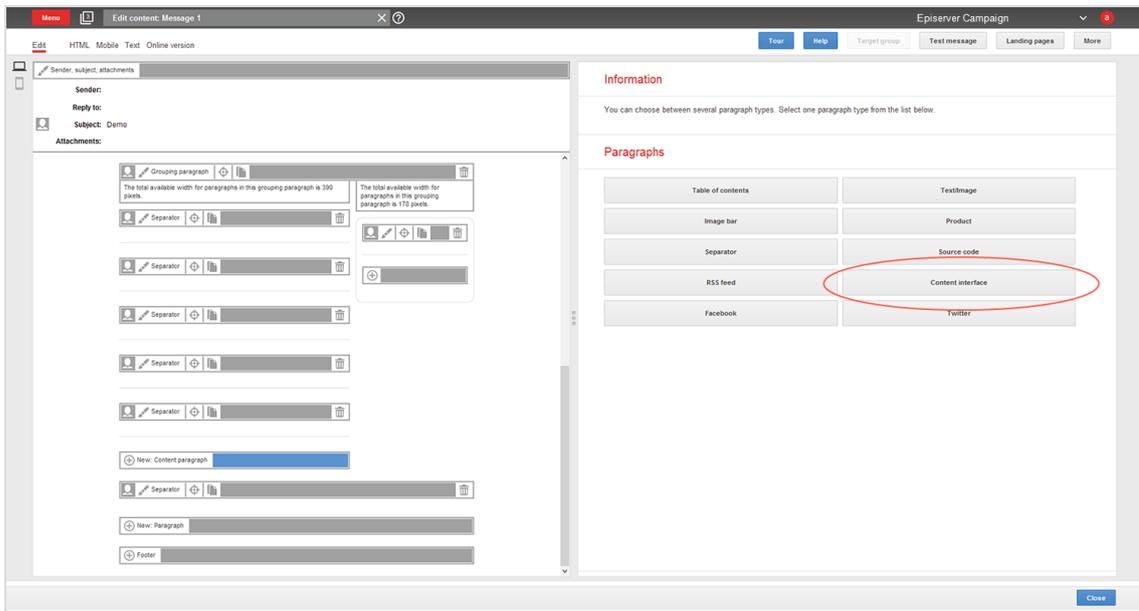
3. Click **Apply**. A new content paragraph of type content interface is created. On the left of the preview is the **Content interface article** button.
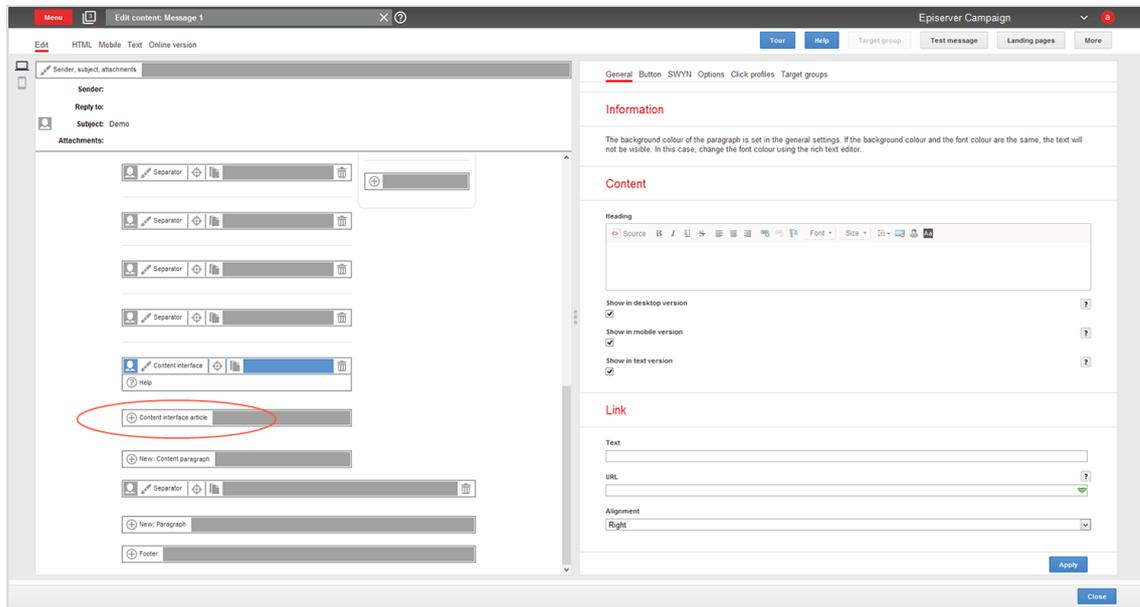
4. Click **Content interface article**. A new content interface article is created. The configuration window for the article opens.

Configuring dynamic CSV and XML articles

After you create a dynamic CSV or XML article, configure it by following these steps:

Recipient list as the mapping reference

1. On the right of the content interface article configuration window, open the **Recipient list** tab.
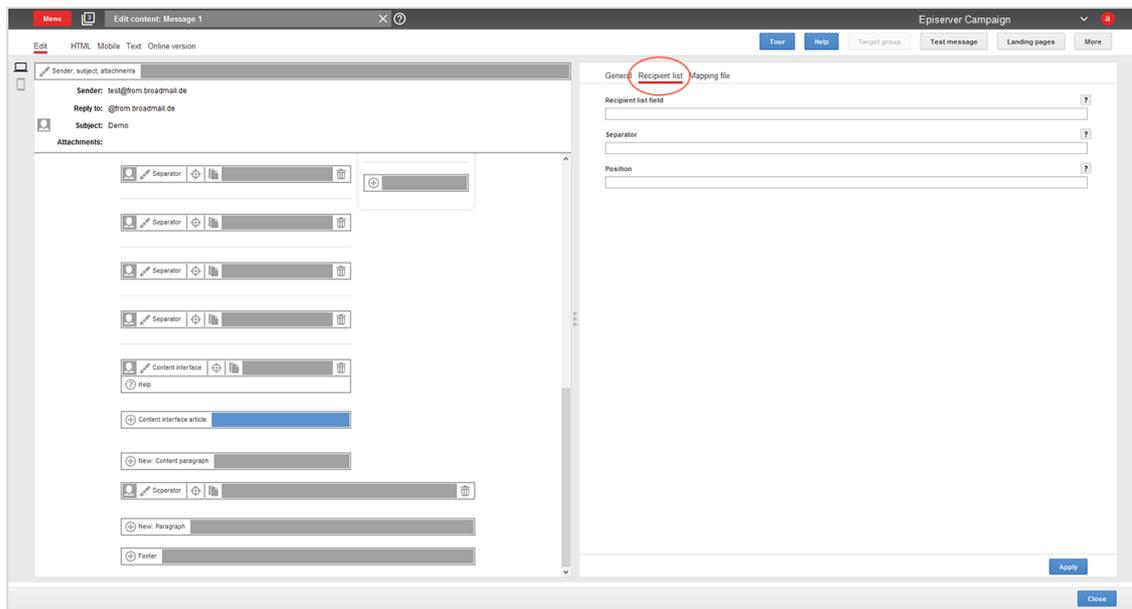
2. In the **Recipient list field** box, enter the name of the recipient list field that contains the product ID. Enclose the name with curly brackets: {Name}.

3. If multiple product IDs are contained in the recipient list field, enter the separator used between product IDs.

> **Note:** If you enter nothing, a comma is assumed.

4. If the recipient list field contains multiple product IDs, enter the position number of the product to be loaded.

   For example, your recipient list field contains three comma-separated product IDs: "001,002,003." To select the product with the ID "003", enter position number "3," because the product ID "003" is in the third position. If you do not enter a position number, the product in the first position is selected automatically.

5. Click **Apply**. To the left of the preview, you see configuration data on the content interface article. When the message is sent, product data is loaded from the data source using this configuration.
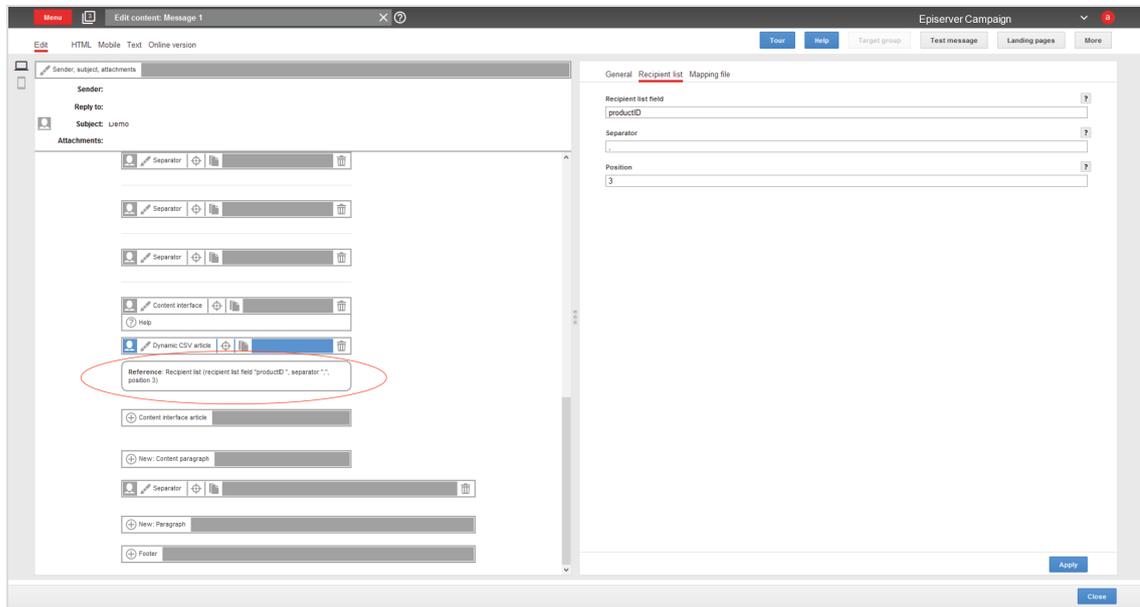
Mapping file as a mapping reference

1. On the right of the content interface article configuration window, open the **Mapping file** tab.
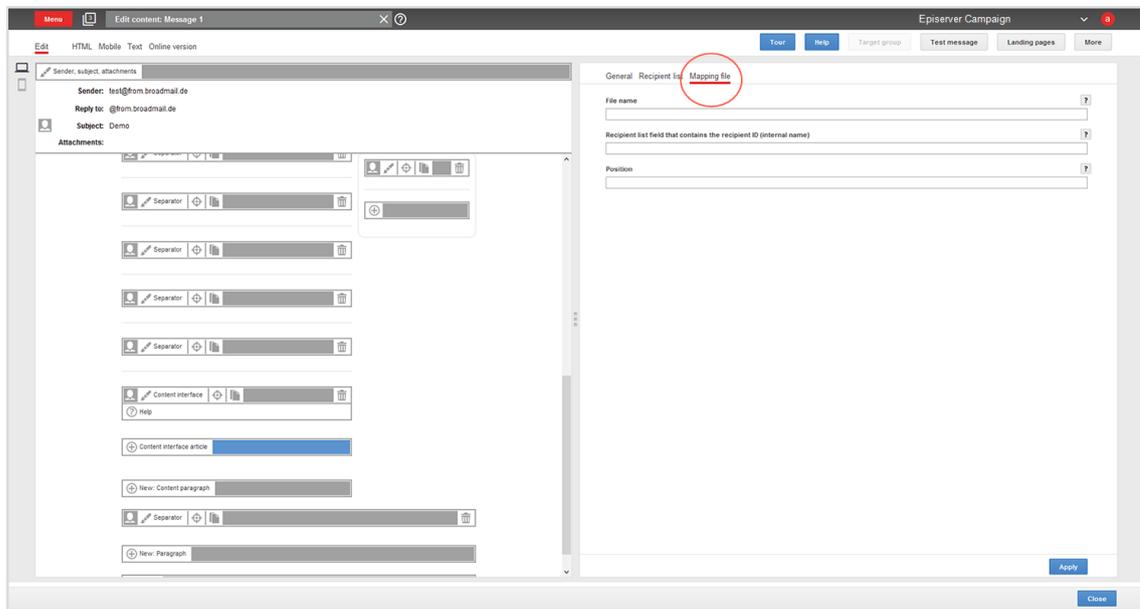
2. In the **File name** box, enter the name of the mapping file.

3. In the **Recipient list field that contains the recipient ID (internal name)** box, enter the internal name of the recipient list field. If you do not know the internal name, contact <u>customer support</u>.

4. If the mapping file in the product ID column contains multiple product IDs, enter the position number of the product to be loaded.

   For example, Your recipient list field contains three comma-separated product IDs: "001,002,003." To select the product with the ID "003", enter position number "3," because the product ID "003" is in the third position. If you do not enter a position number, the product in the first position is selected automatically.

5. Click **Apply**. To the left of the preview is the configuration data on the content interface article. When the message is sent, product data is loaded from the product data source using this configuration.
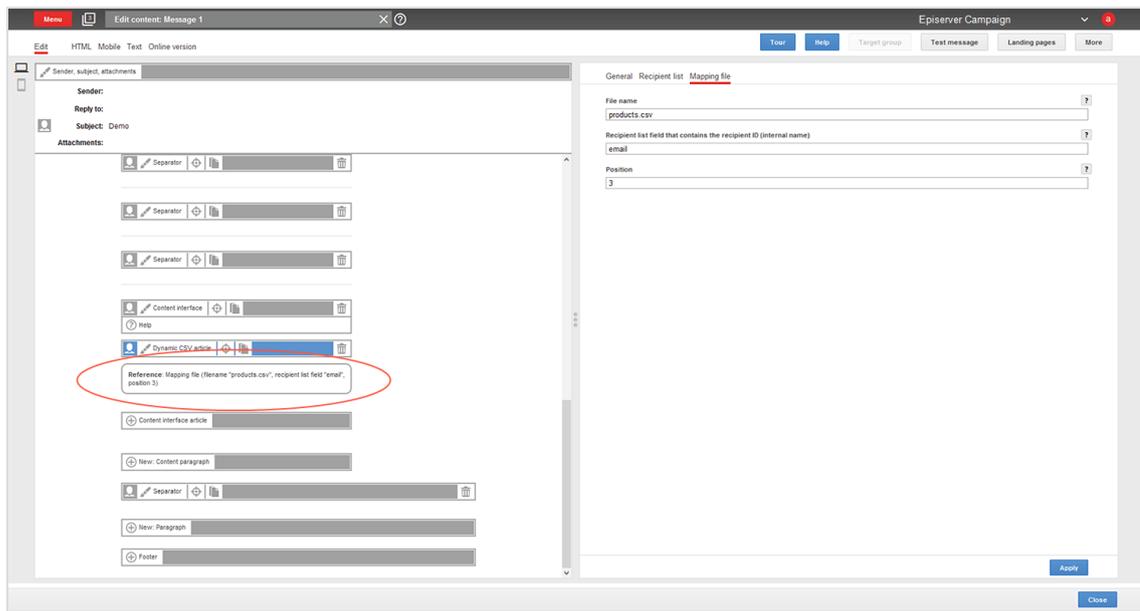
General settings

You create individual product offers as content interface articles, which are subparagraphs of the content interface paragraphs. Within a single message, you can create multiple content interface paragraphs, using multiple lower-level content interface articles. To apply changes to a higher-level content interface paragraph, perform the following steps:

1. In the left side of the preview, click **Content Interface** in the menu bar of the content interface paragraph. On the right side, the configuration window for general settings for the content interface paragraphs open.
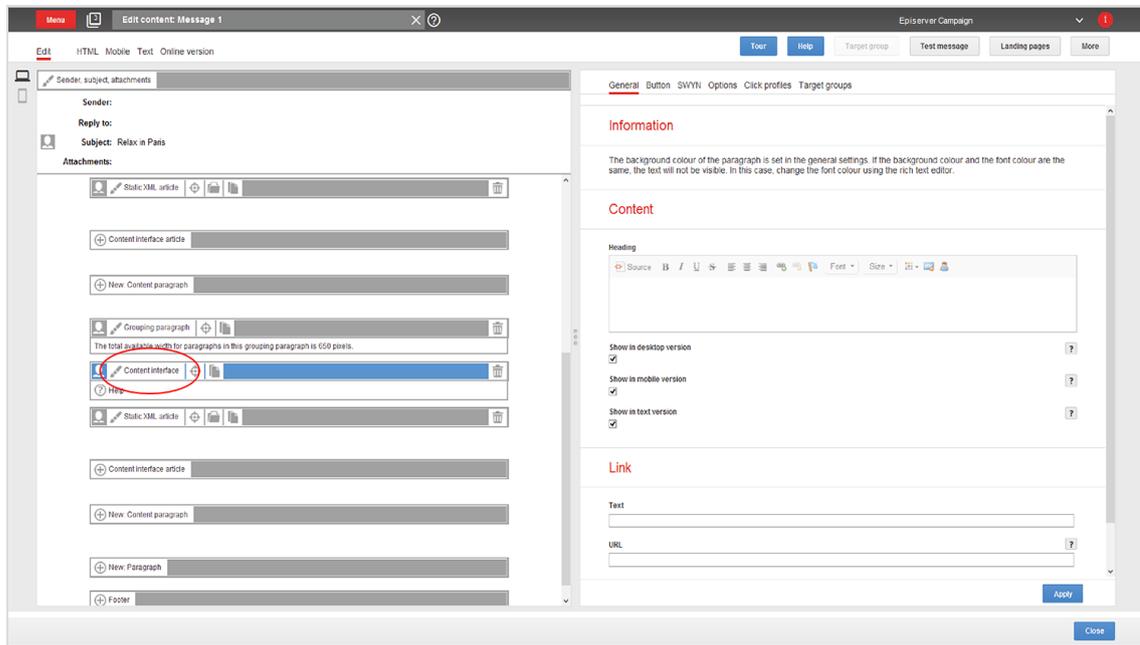
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.

General

Parameter	Description
Content	
Heading	Enter a heading for the paragraph.
Show in desktop version	Select to include this paragraph in the desktop mailing.
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in text version	Select to show the paragraph in the text version of the mailing.

Parameter	Description
Link	
Text	Enter text to describe the link.
URL	Enter a link (such as a landing page for the product group).
Alignment	You can position the link on the right, the left or center.

Button

See Click2Go.

SWYN

You can activate sharing via social networks (SWYN) for each content paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the para-

Parameter	Description
	graph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
MySpace	
Parameters for MySpace are identical to Facebook's.	

Parameter	Description
Xing	
Parameters for Xing are identical to Twitter's.	

Options

You can give each content paragraph a different appearance from the general layout. To do so, use the layout configuration in this tab.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	The paragraph is displayed over the entire height as standard, taking into account the content. Alternatively, you can specify a fixed height value here. If the content exceeds this height, the value is ignored and the content displayed at the corresponding height.
Background color	The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: 10 = sides are uniform with 10 pixels of white space for the content 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.

Parameter	Description
Spacing between the articles	A space with this height is placed between articles. By default, the first number in the Padding option is used. This option is enabled only when using the standard layout.
Layout	Set the general settings for the article layouts in the general settings. If there is no content available for the selected layout, the default layout is used.
Border	
Show	Select if you want to apply a border around the paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the width (in percent; 100% default) of the paragraph in the mobile view. If you want two paragraphs to be displayed next to one another in the mobile view, set their widths so they combine to 100%. Otherwise, the two paragraphs are displayed on top of one another with the allocated widths.
Table of contents	
Show in table of contents	Select to display the paragraph in the table of contents for the section.

Parameter	Description
Alternative table of contents entry	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See **Click profiles**.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic) .See **Target groups**.

HTML layouts

The content interface paragraph has a standard layout for formatting offer texts and images. To receive up to 5 custom layouts, contact **customer support**.

If you have advanced HTML and CSS skills, you can set up alternate HTML layouts yourself. If no alternate layouts are saved for the mobile and text versions, the standard layout is used.

> Note: In some cases, some text elements will not be in the desired order.

Sample standard layout

Sample alternate layout

Selecting a layout

1. To select a standard or alternate layout, while editing a message in the Template Kit, look at the left side of the preview. On the content interface paragraph to which your product offer belongs, click **Content inter-face**. The configuration window opens on the right.
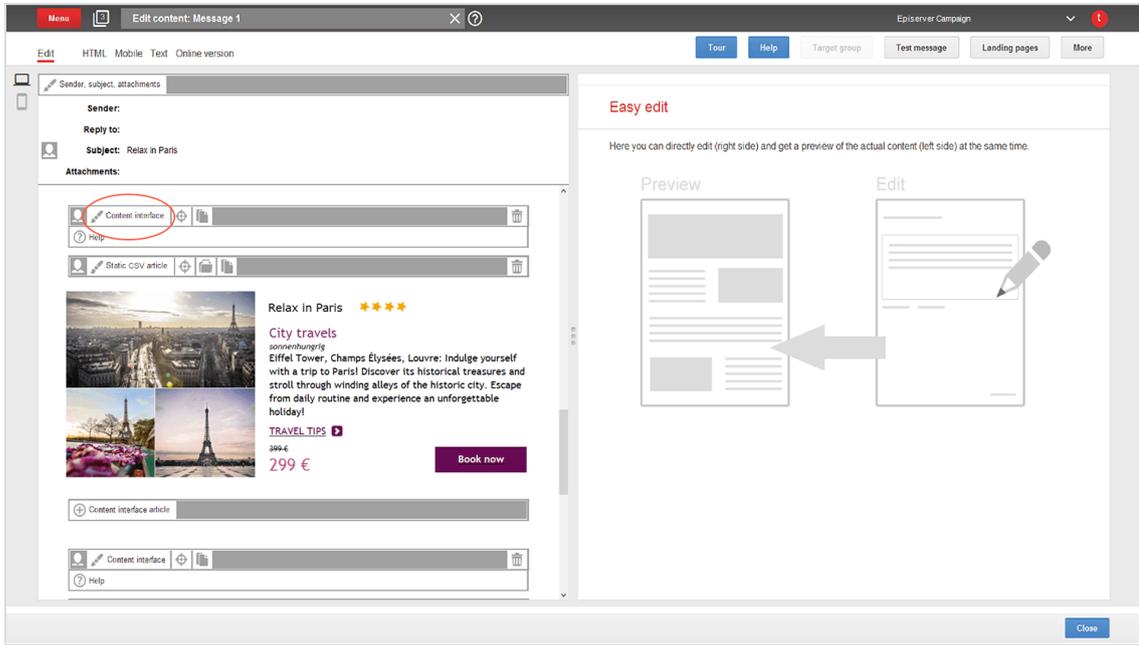
2. Open the **Options** tab.
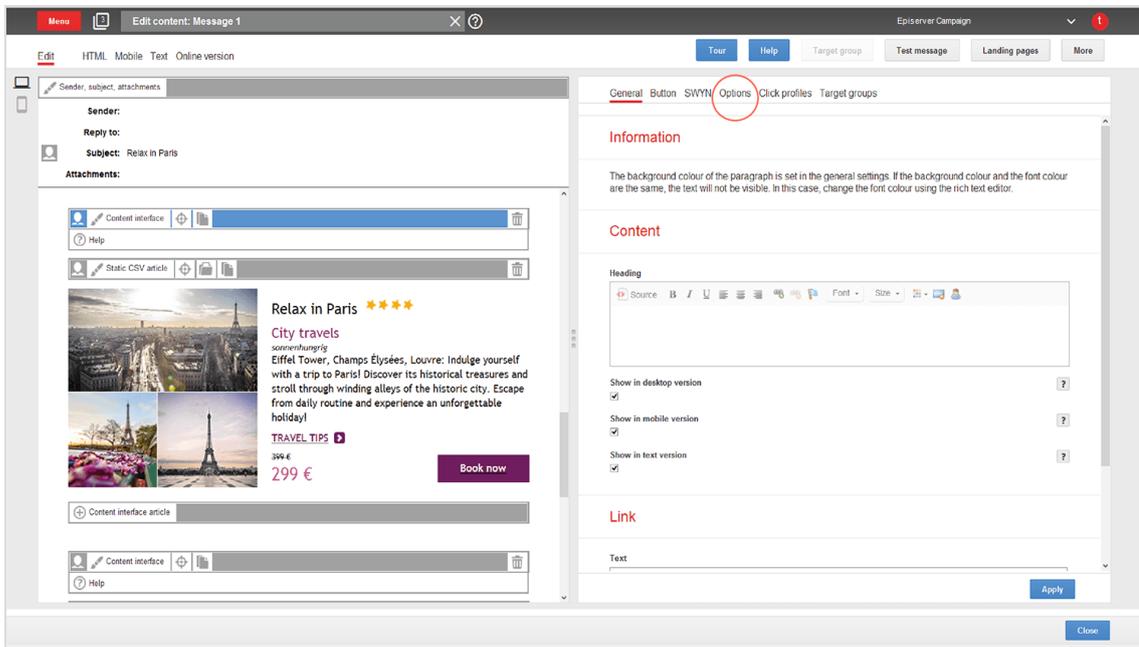
3. In the **Layout** area, in the **Layout** drop-down list, select the layout you want to use.
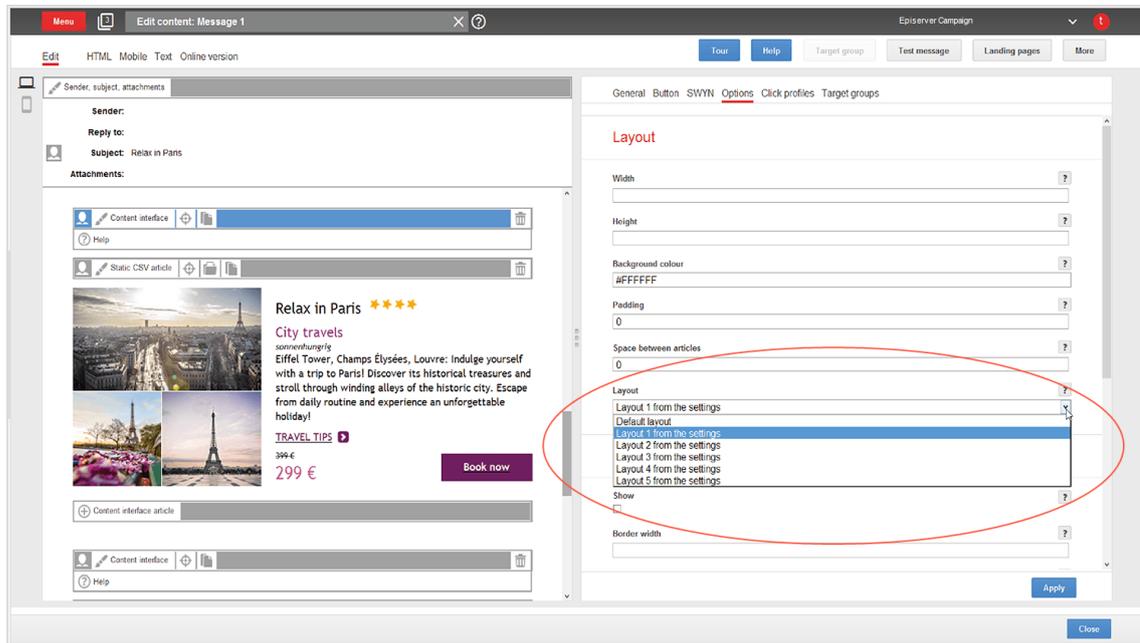
4. Click **Apply**. On the left side of the preview, the formatting of your product offer changes accordingly.

Editing a layout

You can edit alternate layouts at any time. You cannot change the standard layout.

> **Warning:** Editing alternate layouts without advanced HTML and CSS skills can lead to severe errors in your messages.

1. On the left side of the preview, click **Settings**. The configuration window opens.
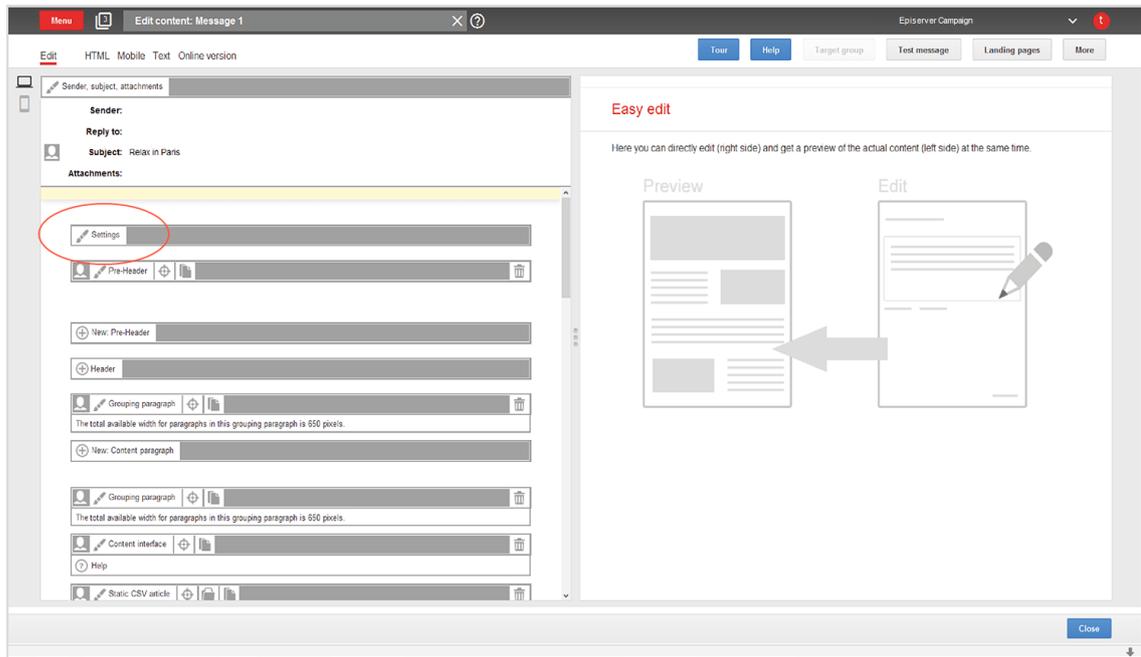
2. Open the **Content interface** tab. Each layout has source text fields for the desktop, mobile, and text version.
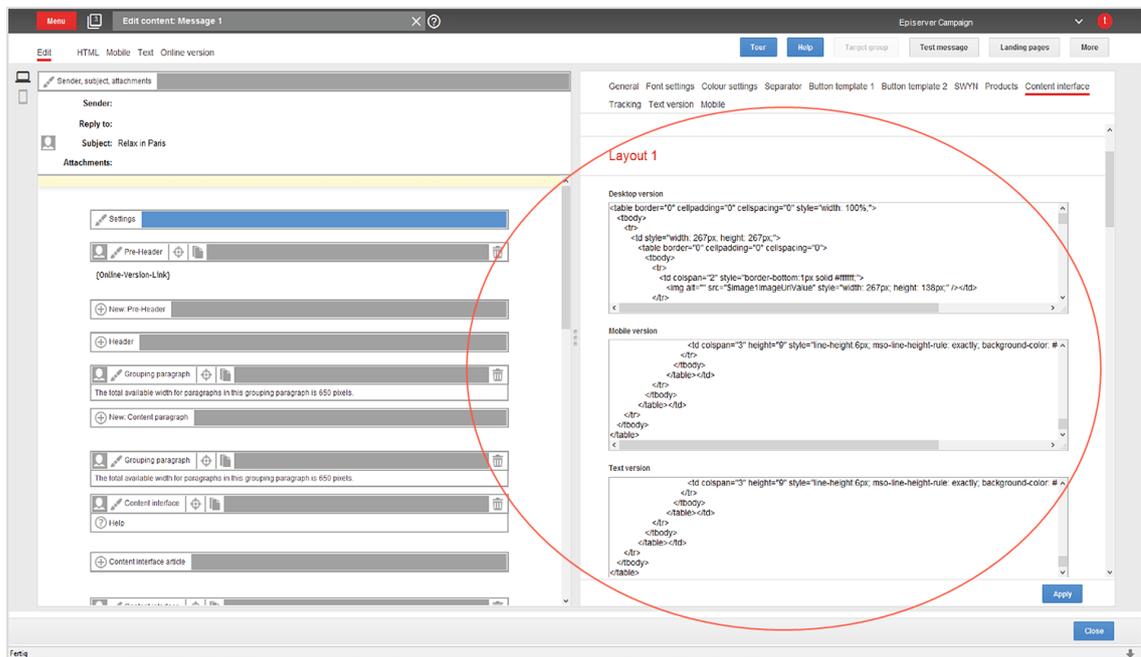
3. Edit the layout source code as desired.

4. Click **Apply**.

Troubleshooting CSV and XML

CSV troubleshooting

Issue	Possible cause	Solution
Product data does not load or loads incorrectly	Semicolons were not used as separators.	Change the separating characters in your CSV file to semicolons.
Product data does not load or loads incorrectly	Quotation marks in texts were not masked with an escape character and were erroneously interpreted as code.	Mask quotation marks in texts with the escape character **"** (with an additional quotation mark for each quotation mark).
Product data was loaded incorrectly	The CSV file is not encoded as UTF-8 without BOM.	Encode the CSV file as UTF-8 without BOM or UTF-8.
Product data was loaded incorrectly	One or more HTML layouts contain incorrect source text.	Correct the source text of the corresponding HTML layout. If you do not have advanced HTML and CSS skills, contact [customer support](#) regarding corrections.
Product data is not loading	The CSV import is not (yet) performed.	Contact [customer support](#) so that they can review the CSV import.
Product data is not loading	The CSV file is saved in the wrong directory on the server.	Transfer the CSV file to the directory you indicated when setting up the content interface.
Product data is not loading and a server error message appears.	The CSV file path is incorrect.	Contact [customer support](#).

Issue	Possible cause	Solution
The content interface paragraph type is not available.	The feature was not activated.	Contact **customer support**.
Components of a product offer are not being shown. For example, a product image is not displayed.	The source text of the HTML layout contains invalid code. For example, a tag is not closed.	Contact **customer support**. If you have advanced HTML and CSS skills, correct the source text.
Links are not being tracked	You entered the link into a standard text field.	Enter the link in a link field. Links placed into a standard text field cannot be tracked.

XML troubleshooting

Issue	Possible cause	Solution
Product data is not loading	The product ID is entered incorrectly.	Enter the correct product ID.
Product data is not loading	The saved XML file has a file extension.	Remove the file extension.
Product data is not loading	The corresponding product offer no longer exists on your webspace or server.	Save the product offer again on your webspace or server.

Issue	Possible cause	Solution
Product data is not loading	The product data is saved in the wrong directory on the server or webspace.	Transfer the product data you are trying to load into the directory that you indicated when setting up the content interface.
Product data is not loading	The product ID is not positioned at the end of the URL.	Change your system configuration so that the product ID is positioned at the end of the URL. **Correct**: https://www.example.com/products/?id=123456789 **Incorrect**: https://www.example.com/products/?id=123456789?param1=XY?param2=abc
Some content is not loading. For example, the product image is missing.	Error in the XML code you generated.	Correct the XML code.
The content interface paragraph type is not available.	The feature has not been activated for you.	Contact customer support.
Components of a product offer are not being	The source text of the HTML layout contains invalid code.	Correct the source text of the corresponding HTML layout. If you do not have advanced HTML and CSS skills, contact customer support regarding the correction.

Issue	Possible cause	Solution
shown. For example, a product image is not displayed.	For example, a tag is not closed.	
Links are not being tracked	You entered the link into a standard text field.	Enter the link in a link field. Links placed into a standard text field cannot be tracked.

Source code paragraph

You can enter HTML code in the source code paragraph. Email programs do not show HTML to the full extent, so code entered here may lead to a faulty layout in your mailing.

The source code paragraph can be used by the Content interface paragraph, which you can use to automatically fill in the content fields.

Creating a source code paragraph

1. While editing the content of a mailing in the Template Kit, click **New: Content paragraph**. A window for selecting the paragraph type opens on the right side.

> **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.
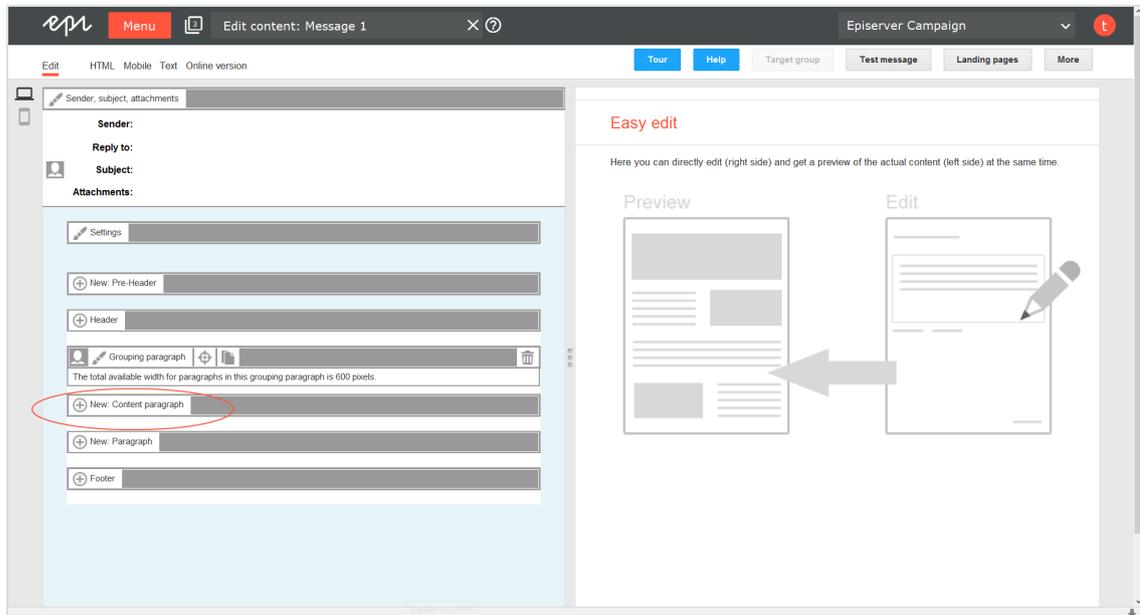
2. Click **Source code**. The configuration window for that paragraph type opens.
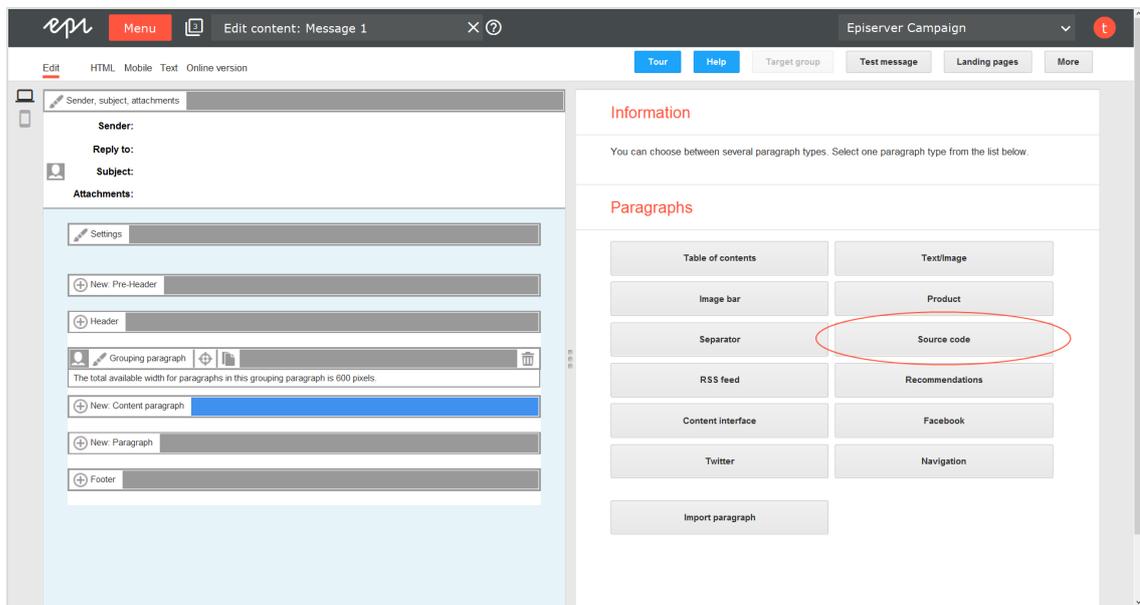
3. Click **Apply**. The newly created source code paragraph will appear on the left side in the preview window.
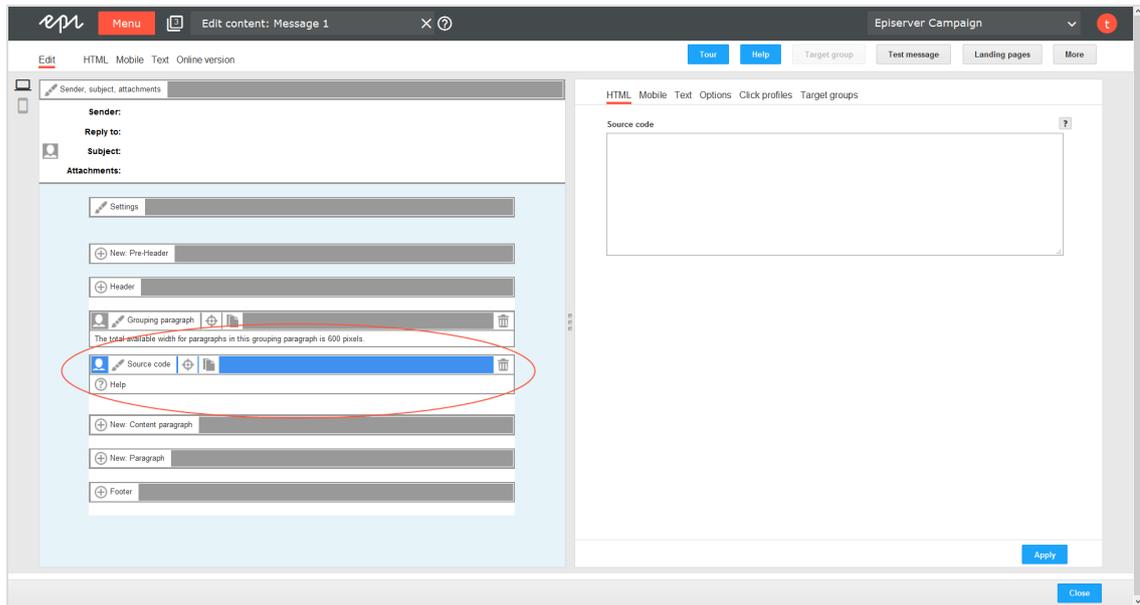
Configuring a source code paragraph

1. On the left side of the preview, in the menu bar of the source code paragraph, click **Source code**. The configuration window opens on the right-hand side.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.
   - HTML
   - Mobile
   - Text
   - Options
   - Click profiles
   - Target groups
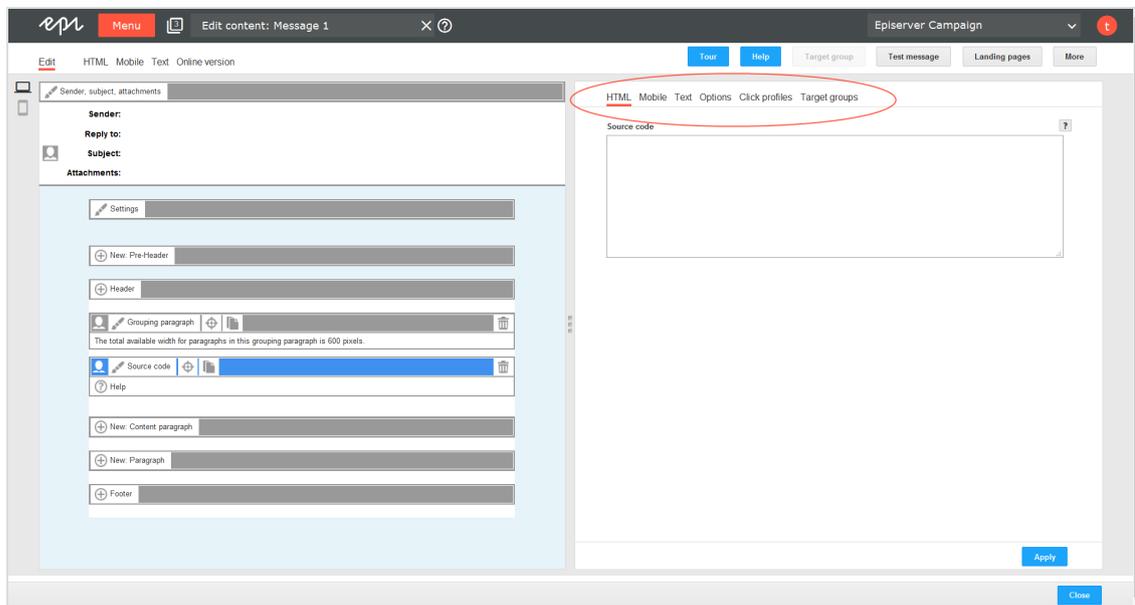
HTML

Parameter	Description
Source code	Enter HTML source code. Do not enter the HTML declaration, meta, or body tags.

Mobile

Parameter	Description
Source code	Enter an alternative source code for the mobile version of the mailing. For this option to take effect, you must activate the setting **Activate mobile version** in the general settings.If the mobile version is activated and you enter nothing here, the **HTML** tab's source code is used for the mobile version.

Text

Parameter	Description
Text	Enter the text for the text version of this paragraph. Do not use HTML or other formatting.

Parameter	Description
	However, you can insert line breaks and special characters for separator elements (for example ***** or ++++++).

Options

You can define an individual layout, different from the general newsletter layout, for each content paragraph.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Background color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: 10 = sides are uniform with 10 pixels of white space for the content 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Border	

Parameter	Description
Show	Check to apply a border around the paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Table of contents	
Show in Table of Contents	Select to display the paragraph in the table of contents for the section.
Heading	Enter a heading to be displayed in the table of contents. If you leave the field blank, the heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click profile	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target group	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic)see Target groups.

Loading content via the content interface

If the content interface is activated for the source code paragraph in your client, you can provide the content of the HTML, mobile, and text version in a CSV file and import them into the source code paragraph. The CSV format cannot be changed.

Format the CSV file as follows:

```
id;name;html;mobile;text 1;Source code 1;
   <div class="html-version" style="background-color: #ff0000;">HTML version</div>;
"   <div class="mobile-version" style="background-color: #ff0000;">Mobile version</div>";
   Text version
```

To integrate the content in the source code paragraph, click the menu bar of the paragraph **Open** and select the desired content in the right column.

Hints

- The **id** and **name** columns are only used internally. Enter a name to help you identify the paragraph in the editor.
- The **html**, **mobile** and **text** columns can contain HTML source code that is added unchanged to the source code paragraph.
- Values must be CSV-compliant.
- To format the content, you must have strong HTML knowledge, particularly of email. The use of invalid or non-supported HTML code may lead to major display errors in the mailing.

![icon] *Text or image paragraph*

Use the text/image paragraph to add a text block or image to your mailing. You can also position the elements relative to one another.

Creating a text/image paragraph

1. While editing the content of a mailing in the [Template Kit](#), click **New: Content paragraph**. A window for selecting the paragraph type opens on the right side.

> **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.
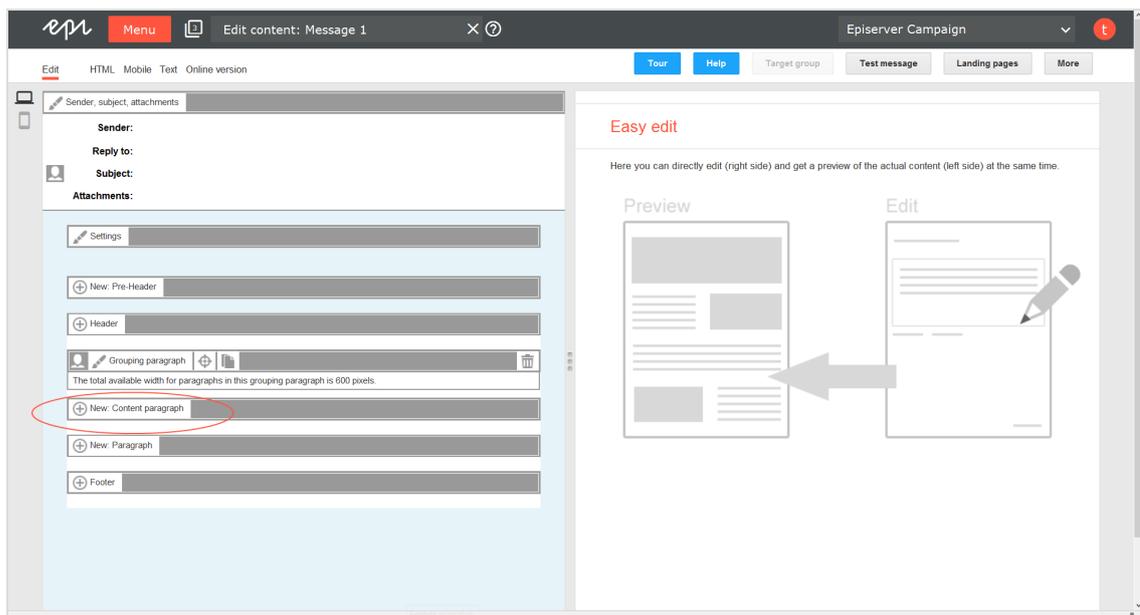
2. Click **Text/image**. The configuration window for the selected paragraph type opens.
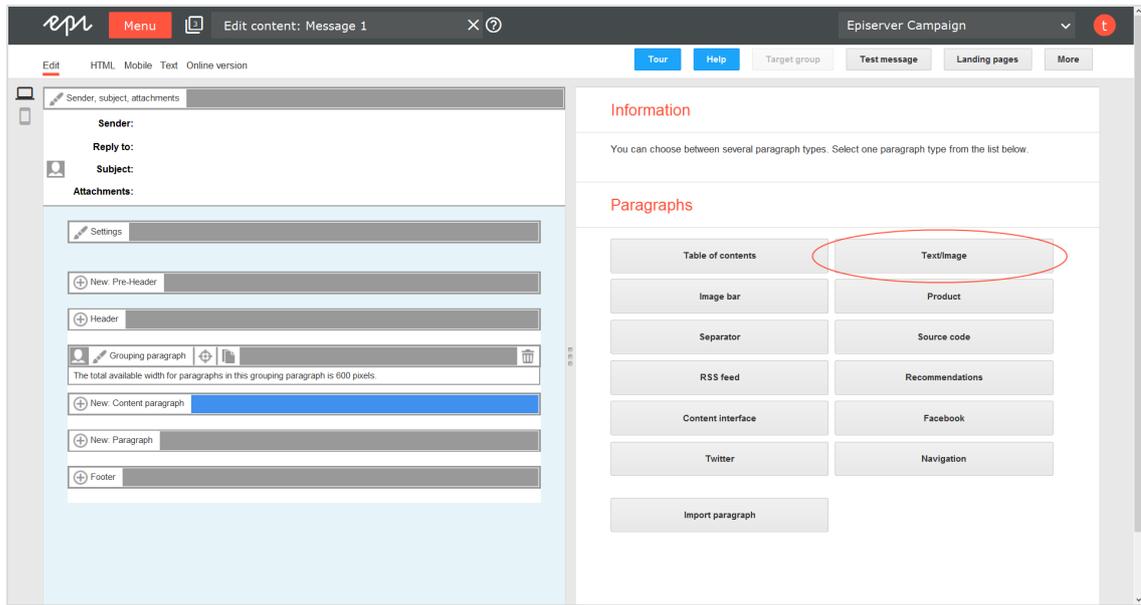
3. Click **Apply**. The newly created text/image paragraph appears on the left of the preview window.
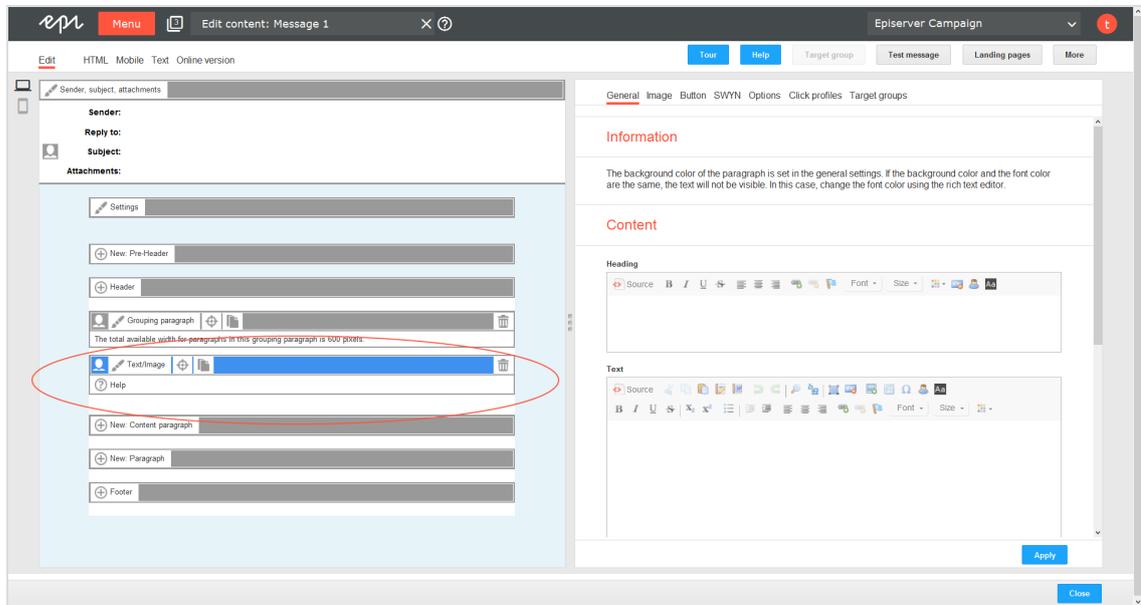
Configuring a text/image paragraph

1. On the left side of the preview, in the menu bar of the text/image paragraph, click **Text/image**. The configuration window opens on the right side.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.

   - General
   - Image
   - Button
   - SWYN
   - Options
   - Click profiles
   - Target groups

General

Parameter	Description
Content	
Heading	Enter a heading for the paragraph.

Parameter	Description
Text	Enter text using the Rich Text Editor. You can use additional formatting, for example insert breaks, create lists and tables and use other text decorations and colors. For formatting purposes, use the Rich Text Editor toolbar.
Show in desktop version	Select to include this paragraph in the desktop mailing.
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in Text Version	Select to show the paragraph in the text version of the mailing. You might do this, for example, with an image bar paragraph, because images are not displayed in the text version. Alternative text is displayed there instead.
Link	
Text	This text is linked to the URL entered below.
URL	Enter a target URL here, for example a landing page.
Alignment	Alignment can be right, left or centered.

Image

Parameter	Description
Image	Upload an image from your computer or enter an image URL in the **Alternative external URL** field that points to the image file.
Alternative text	This text is displayed if a recipient blocks or disables the display of images in his/her email client, or if the image cannot be displayed for another reason. Enter a short image description or title.

Parameter	Description
Link	You can link the image to a landing page or a page from your website. If you entered a text link in this paragraph, you should use the same link for the image.
Subtitle	Enter an optional image subtitle here.
Position	You can place the image in a separate column next to heading and text block, or in a separate column next to the text block and below the heading. These positions are recommended in most cases.
	If you use large images that cover the entire width of a paragraph or area, place them centered below the heading, text, or the link. If you select the **Below the heading right aligned** or **Below the heading left aligned** options, the text floats around the image.

Button

See [Click2Go](#).

SWYN

You can enable the SWYN function for social networks individually for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.

Parameter	Description
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.

Parameter	Description
MySpace	
Parameters for MySpace are identical to Facebook's.	
Xing	
Parameters for Xing are identical to Twitter's.	

Options

You can define an individual layout, different from the general newsletter layout, for each content paragraph.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Background color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right

Parameter	Description
	• 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Border	
Show	Select if you want to apply a border around the entire paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Table of contents	
Show in table of contents	Select to display the paragraph in the table of contents for the section.
Alternative	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the

Parameter	Description
table of contents entry	heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups.

Table of contents paragraph

Use the table of contents paragraph to create a table of contents for your mailing. You can control the display of items in the table of contents by including only certain areas.

- List paragraphs instead of the header and footer
- List paragraphs including the header, except for the footer
- List paragraphs including the footer, except for the header
- List paragraphs including the header and footer
- Only list the paragraphs of a grouping paragraph

> **Tip:** To exclude content paragraphs from the table of contents, edit the corresponding content paragraph. In the content paragraph's configuration window, edit the **Options** tab > **Table of contents** setting and enter the desired value.

Creating a table of contents paragraph

1. While editing the content of a mailing in the [Template Kit](#), click **New: Content paragraph**. A window for selecting the paragraph type opens on the right side.

> **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.
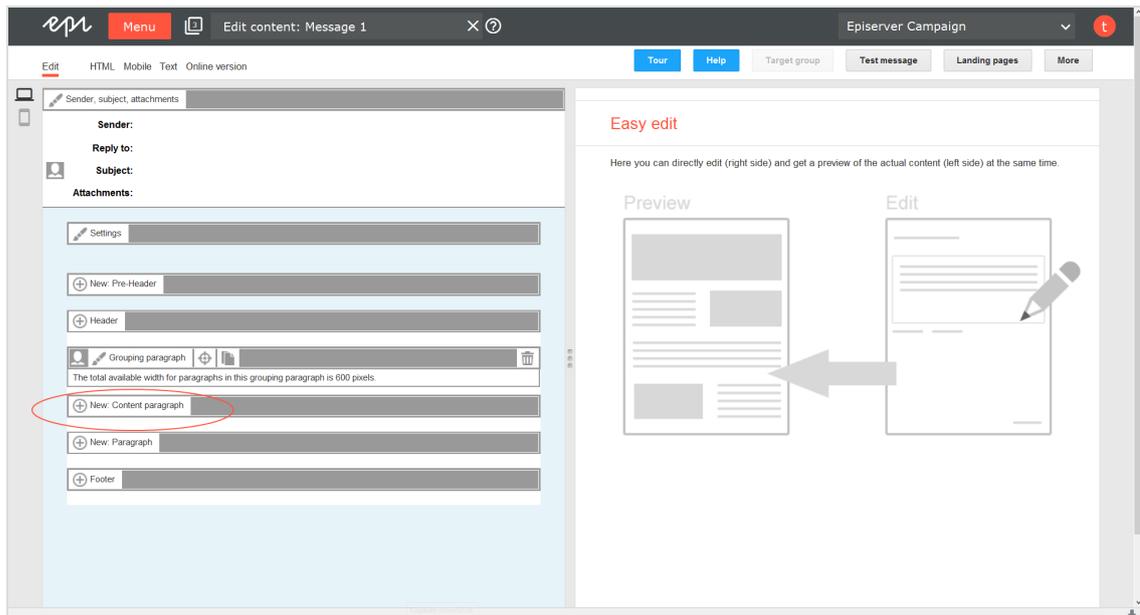
2. Click **Table of contents**. The configuration window for the selected paragraph type opens.
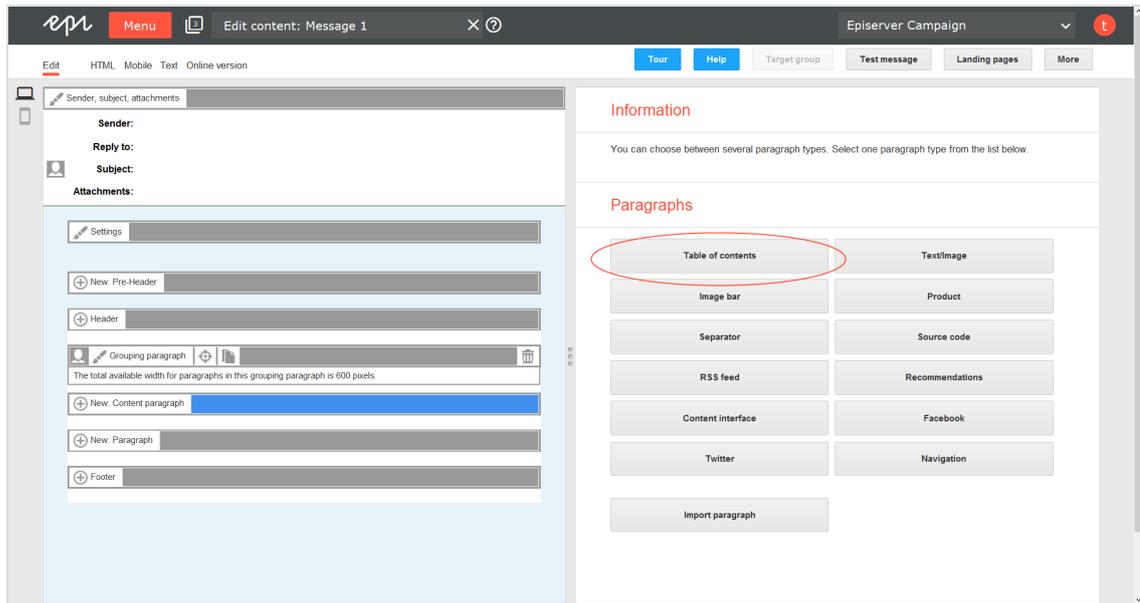
3. Click **Apply**. The new table of contents paragraph appears on the left.
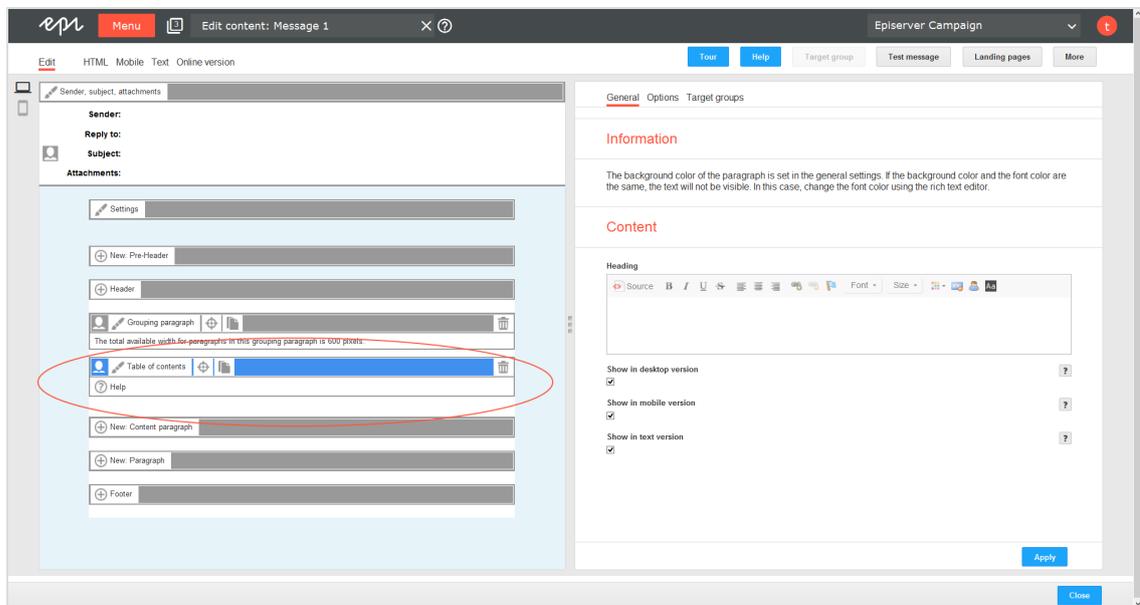
Configuring a table of contents paragraph

1. On the left side of the preview, in the menu bar of the table of contents paragraph, click **Table of contents**. The configuration window opens on the right.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.
   - [General](#)
   - [Options](#)
   - [Target groups](#)
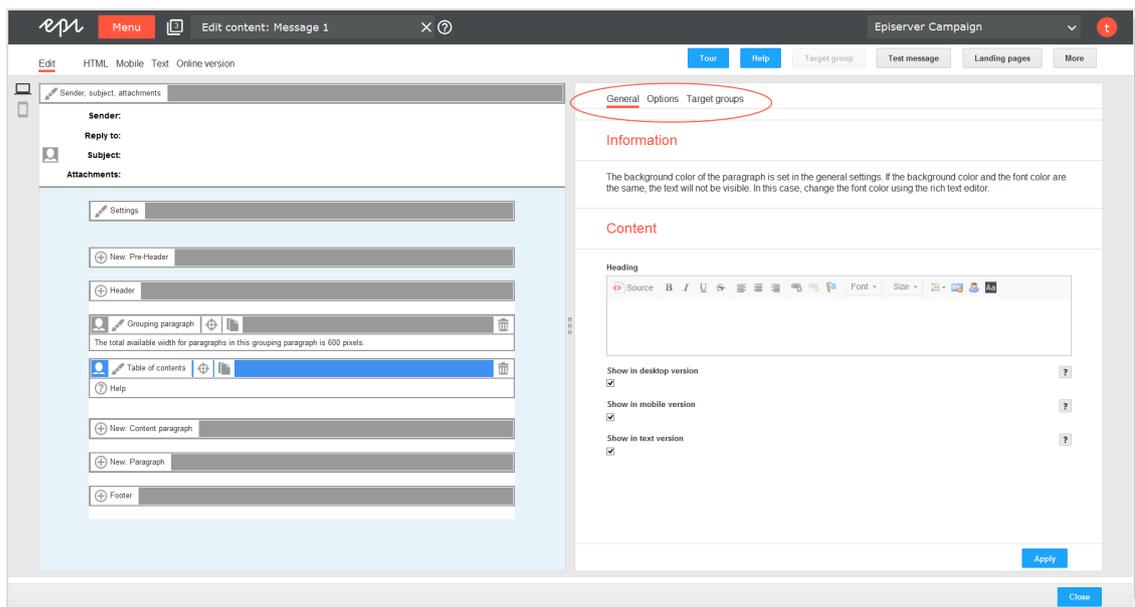
General

Parameter	Description
Content	
Heading	Enter a title for the table of contents.
Show in desktop version	Select to include this paragraph in the desktop mailing.

Parameter	Description
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the [general settings](#) must be activated for this option to take effect.
Show in text version	Select to show the paragraph in the text version of the mailing.

Options

You can define an individual layout, different from the general newsletter layout, for each content paragraph.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Area	Select the paragraph areas to be included in the table of contents.
Background color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content

Parameter	Description
	• 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Border	
Show	Select if you want to apply a border around the entire paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Lists	
List type	You can layout the table of contents in a default CSS style. Use a custom label or no label.
Custom list item label	If you want to use a custom list item label, upload a graphic. The maximum width is 30 pixels. Larger images are scaled down to this size.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See **Target groups**.

Image bar paragraph

Create a horizontal or vertical image bar that contains up to ten images. Uploaded images are automatically scaled and adapted to the available width.

Creating an image bar paragraph

1. While editing the content of a mailing in the **Template Kit**, click **New: Content paragraph**. A window for selecting the paragraph type opens on the right side.

   Tip: You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.
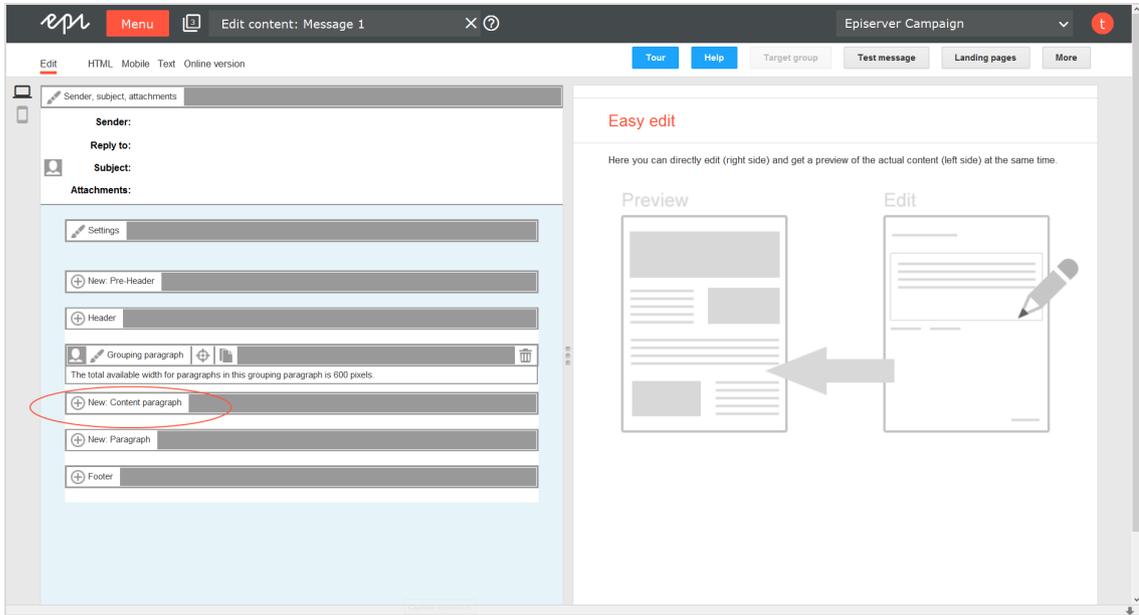
2. Click **Image bar**. The configuration window for the selected paragraph type opens.
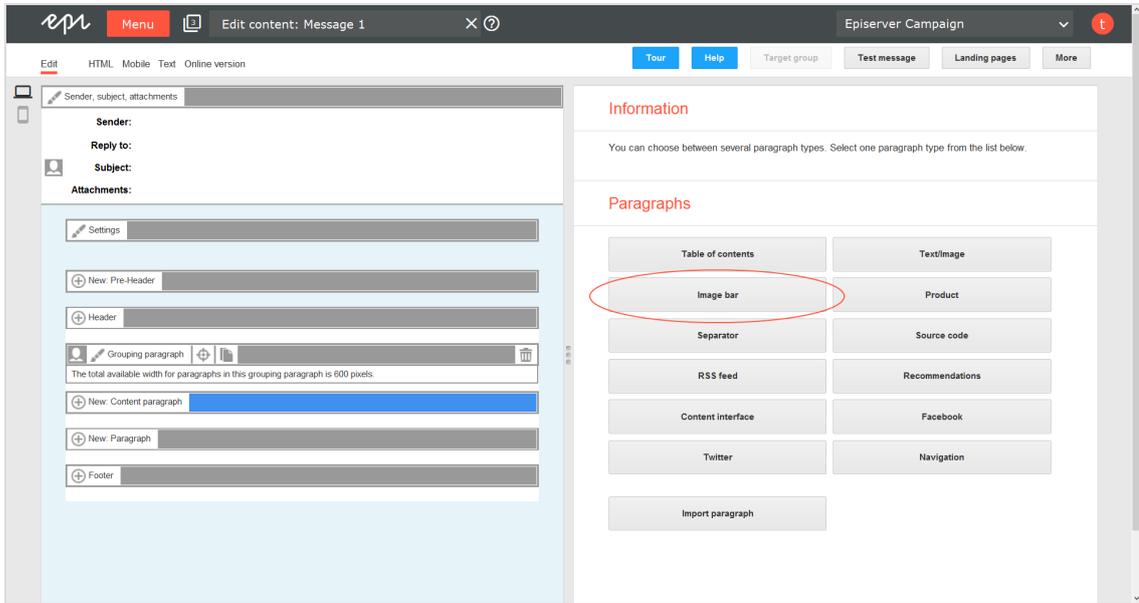
3. Click **Apply**. The new image bar paragraph appears on the left side in the preview window.
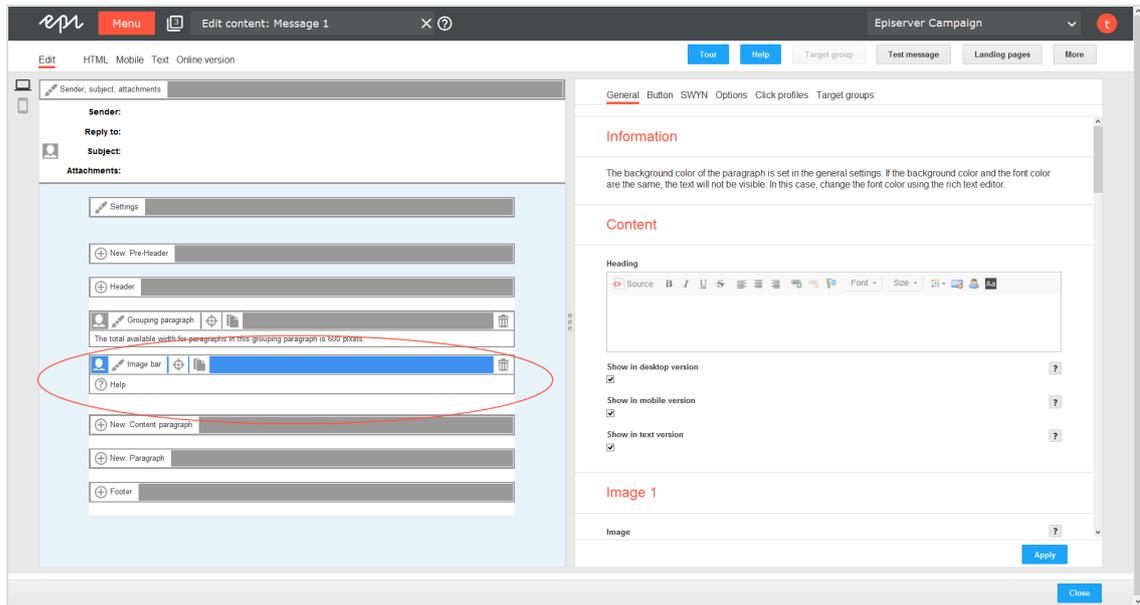
Configuring an image bar paragraph

1. On the left side of the preview, in the menu bar of the image bar paragraph, click **Image bar**. The configuration window opens on the right-hand side.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.
   - General
   - Button
   - SWYN
   - Options
   - Click profiles
   - Target groups

General

Parameter	Description
Content	
Heading	Enter a heading for the paragraph.
Show in desktop version	Select to include this paragraph in the desktop mailing.
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the [general settings](#) must be activated for this option to take effect.
Show in text version	Select to show the paragraph in the text version of the mailing.

Parameter	Description
Image 1-10	
Image	Upload an image from your computer or enter an image URL in the field **Alternatively external URL** that points to the image file.
Alternative Text	This text is displayed, if a recipient has blocked or disabled the display of images in the email client, or if the image cannot be displayed for any other reason. Enter an alternative text that may contain a short image description or title.
Link	You can link the image to a landing page or a page from your website. If you have entered a text link in this paragraph, we recommend that you use the same link for the image.

Button

See [Click2Go](#).

SWYN

You can enable the SWYN function for social networks for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.

Parameter	Description
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
MySpace	
Parameters for MySpace are identical to Facebook's.	
Xing	

Parameter	Description
Parameters for Xing are identical to Twitter's.	

Options

On the **Options** tab, define an individual layout, different from the general newsletter layout, for each content paragraph.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Separation space	Enter an integer value (pixels) to create a space between the images.
Arrangement	By default, a horizontal image bar is created. Alternatively, you can laid out the image bar vertically.
Alignment	Select how the image bar is to be positioned. If you have a horizontal image bar that uses the entire available width, changing this value does not affect the display.
Background color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to

Parameter	Description
	separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Border	
Show	Select if you want to apply a border around the entire paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Separation space	Enter an integer value (pixels) to create a space between the images.

Parameter	Description
Table of contents	
Show in table of contents	Select to display the paragraph for the section in the table of contents .
Alternative table of contents entry	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See **Target groups**.

Separator paragraph

You can use the separator paragraph either at the main level for visually separating multiple grouping paragraphs or the second level for separating content paragraphs.

Creating a separator paragraph

1. While editing the content of a mailing in the Template Kit, click **New: Content paragraph**. A window for selecting the paragraph type opens on the right side.

> **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.
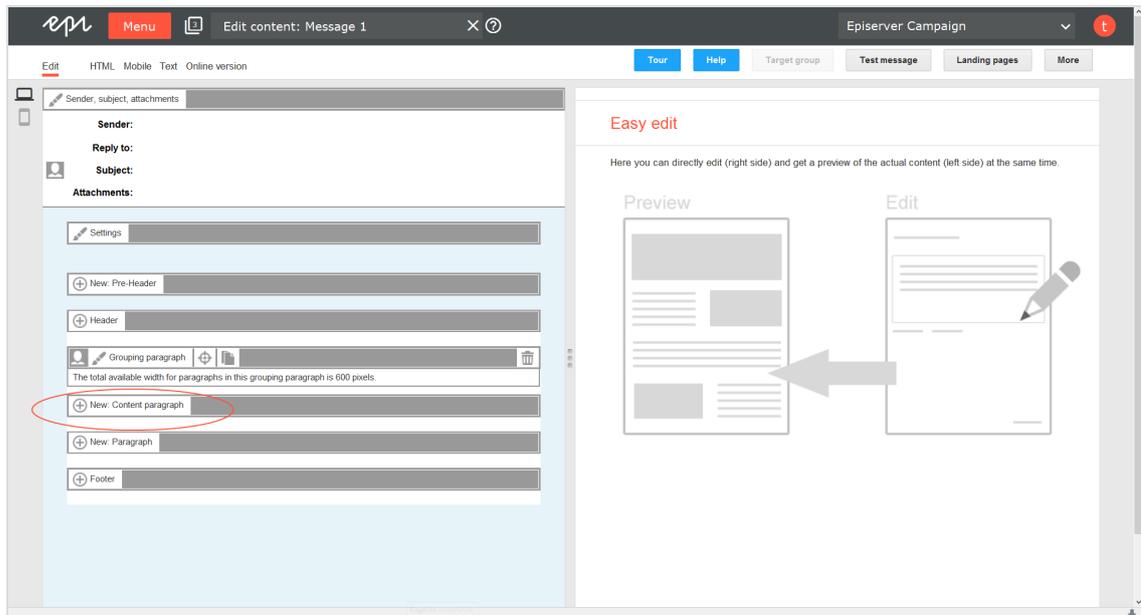
2. Click **Separator**. The configuration window for the selected paragraph type opens.
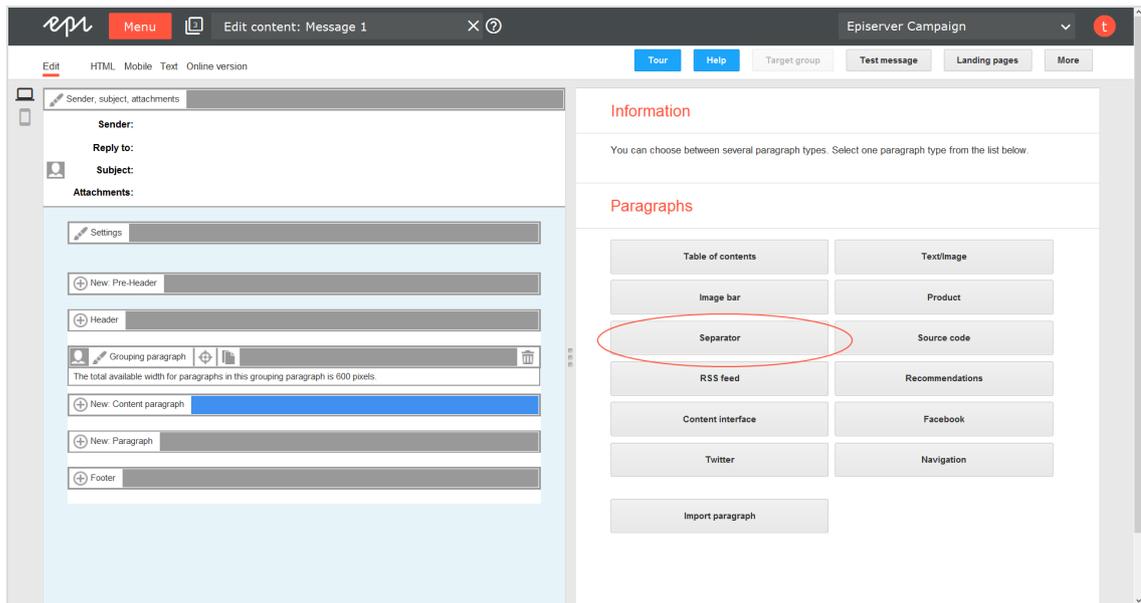
3. Click **Apply**. The new separator paragraph appears on the left.
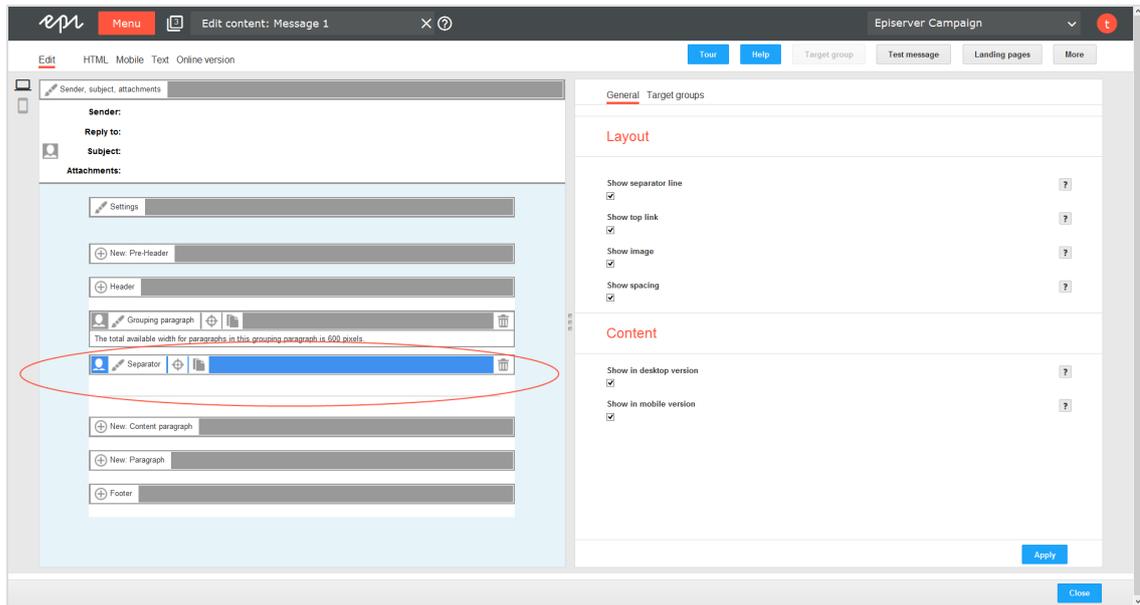
Configuring a separator paragraph

1. On the left side of the preview, in the menu bar of the separator paragraph, click **Separator**. The configuration window opens on the right.

2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.

   - General
   - Target groups
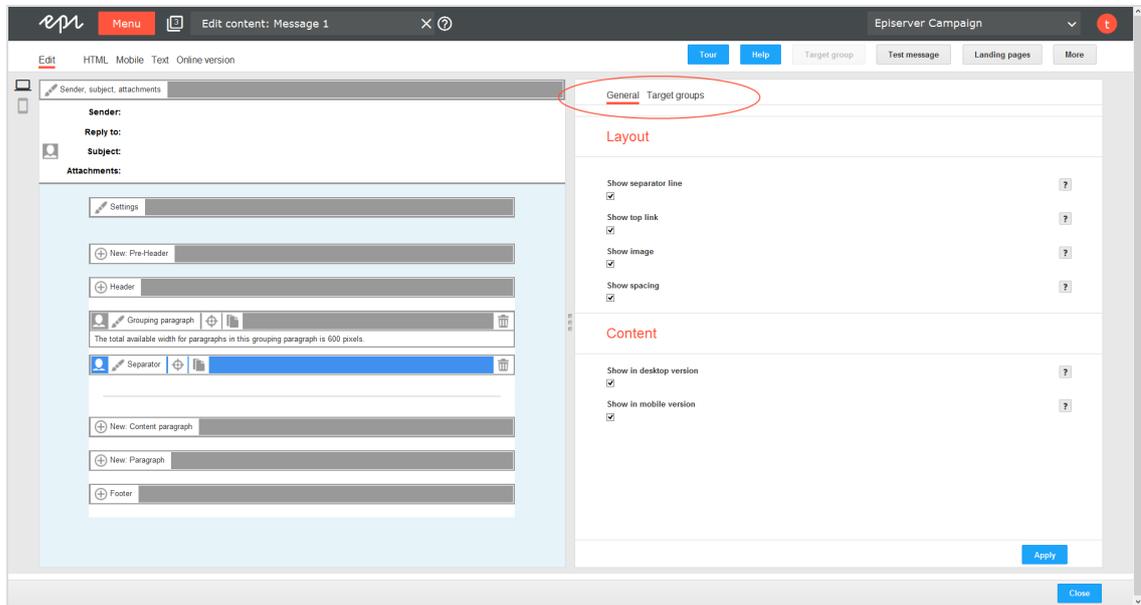
General

Parameter	Description
Layout	
Show separator line	Define the layout of the horizontal line in the general settings.
Show top link	Define the layout of the top link in the general settings.
Show image	Upload a custom top link icon in the general settings.
Show spacing	Define the spacing above and below the horizontal line, and above and below the top link in the general settings.
Content	
Show in	Select to include this paragraph in the desktop mailing.

Parameter	Description
desktop version	
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.

Target groups

You can assign separator paragraphs to a target group. Test the newsletter layout for target groups using the action button **Target group** at the upper right of the window.

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups.

⬚ *RSS feed paragraph*

> **Note:** Contact customer support to activate this feature.

You can use an RSS feed to publish information in a standardized format, effectively providing a type of interface for third-party providers. The Template Kit can access this interface and incorporate its content into a newsletter. You can edit texts or reposition content after it is retrieved.

The Template Kit may contain several RSS feed paragraphs, each of which accesses a different feed.

You can insert RSS feed paragraphs into header and footer spaces and in structural paragraphs. Also, a supplementary tab is activated in the Template Kit's general settings, where you can set content order in standard layout. You can define alternative layouts by entering HTML/text via the **Options** tab.

Formatting the RSS feed

For the RSS feed to be processed correctly, it must meet the RSS 2.0 specification. The required information for the channel node is not processed by the Template Kit, but it must still be available. Only the subnodes of the

item node are used.

Sample Rss feed

```xml
<?xml version="1.0"?>
<rss version="2.0">
  <channel>
    <title>RSS Feed</title>
    <link>http://www.example.com/</link>
    <description>Text</description>
      <item>
        <title>Title 1</title>
        <description>Text</description>
        <enclosure url="http://www.example.com/image2.png" length="12345" type="image/png" />
        <link>http://www.example.com/title1</link>
        <comments>http://www.example.com/title1/comments</comments>
        <category>News</category>
        <author>author@example.com</author>
        <pubDate>Sun, 19 May 2002 15:21:36 GMT</pubDate>
      </item>
      <item>
        <title>Title 2</title>
        <description>Text</description>
        <enclosure url="http://www.example.com/image2.png" length="23456" type="image/png" />
        <link>http://www.example.com/title2</link>
        <comments>http://www.example.com/title2/comments</comments>
        <category>News</category>
        <author>author@example.com</author>
        <pubDate>Sun, 19 May 2002 15:21:36 GMT</pubDate>
      </item>
    </channel>
</rss>
```

Creating an RSS feed paragraph

1. While editing the content of a mailing in the Template Kit, click **New: Content paragraph**. A window for selecting the paragraph type opens on the right side.

   > **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.
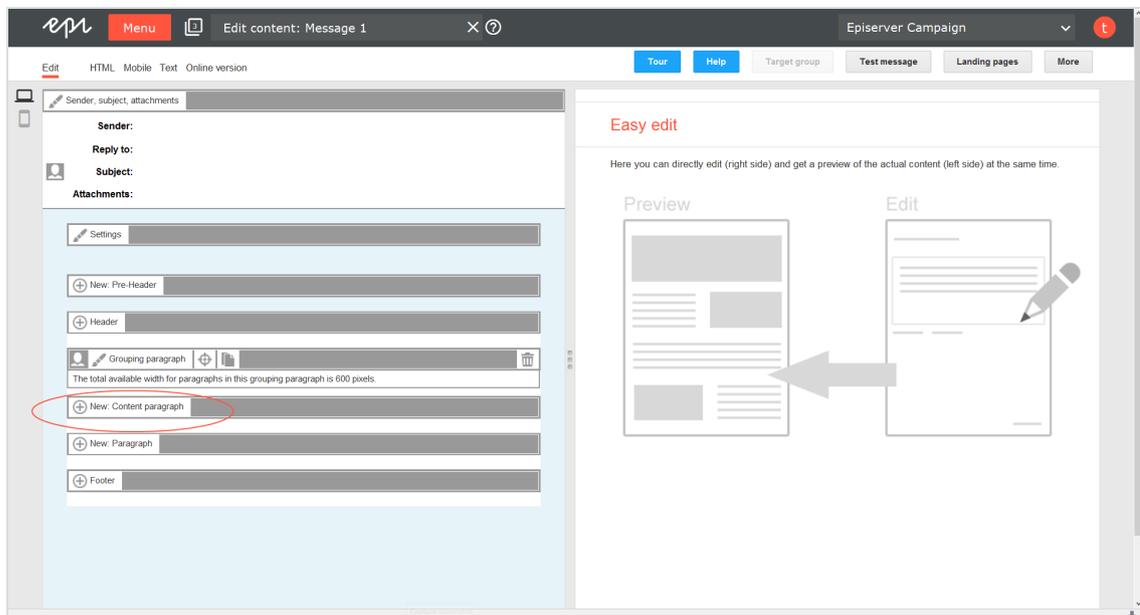
2. Click **RSS feed**. The configuration window for the selected paragraph type opens.
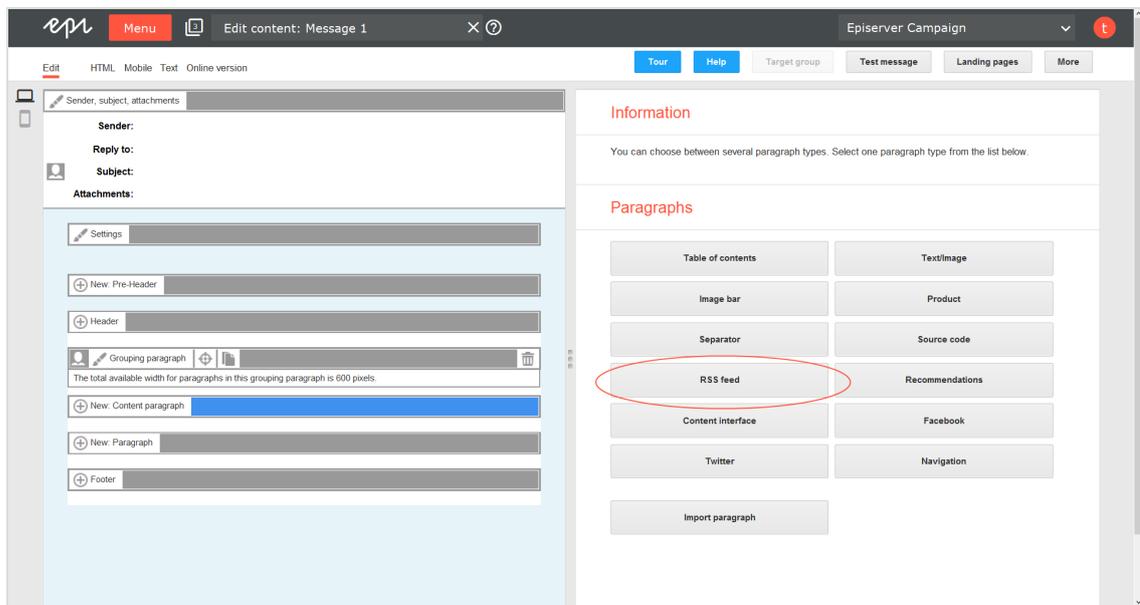
3. Change no settings in the configuration window. Click **Apply**. The new RSS feed paragraph appears on the left in the preview window.
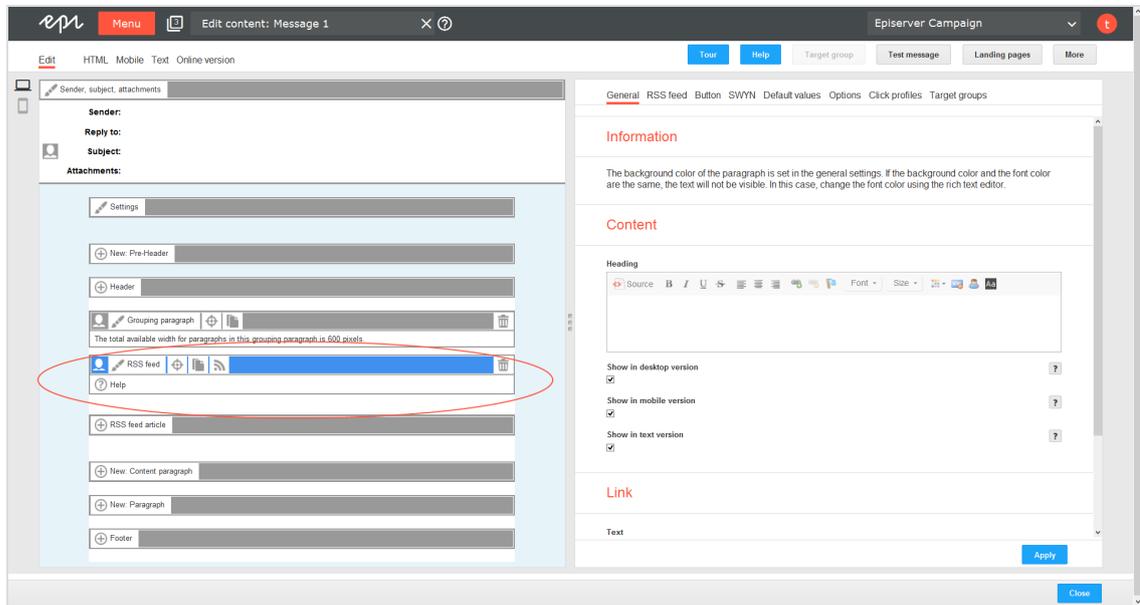
Configuring the RSS feed paragraph

1. On the left side of the preview, in the menu bar of the RSS feed paragraph, click **RSS feed**.
2. See the following tables to set options. Click **Apply** to confirm your settings.

   - General
   - RSS feed
   - Button
   - SWYN
   - Default values
   - Options
   - Click profile
   - Target groups

General

Parameter	Description
Content	
Heading	Enter a heading for the paragraph.
Show in desktop version	Select to include this paragraph in the desktop mailing.
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in text version	Select to show the paragraph in the text version of the mailing.
Link	

Parameter	Description
Text	This text is subsequently linked in the mailing.
URL	Enter the RSS feed landing page (for example) or another URL.
Alignment	Position the link to the right, left, or center.

RSS feed

Parameter	Description
URL	Enter the URL of the RSS feed from which the content is loaded.
Maximum number of entries	The maximum value is 20 entries. If you do not specify a value, 10 entries (if available) are retrieved from the RSS feed and inserted into the newsletter. If more entries are available in the RSS feed, they are ignored. If you enter 0, the default value of 10 entries is retrieved. This option is only applicable for the retrieval of RSS feeds. Changing this number does not affect the posts that have been loaded. Note that the **Category filter** option is only applied *after* the entries are retrieved, so that fewer entries may be displayed.
Date format	This option is only applicable for the retrieval of RSS feeds. Changing the date format does not affect the posts that have already been loaded.
Category filter	Entries in the RSS feed are displayed by default. If your RSS feed is divided into different categories, you can filter them by a specific term, which is supplied in the **Categories** field of the RSS feed.

Button

See Click2Go.

SWYN

You can enable the SWYN function for social networks individually for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 × 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.

Parameter	Description
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
MySpace	
Parameters for MySpace are identical to Facebook's.	
Xing	
Parameters for Xing are identical to Twitter's.	

Default values

These values are inherited from the RSS feed items integrated with this paragraph. When the RSS feed is retrieved, existing paragraphs are removed, and available entries are created as new paragraphs. These values can be overwritten if items are manually edited later.

Parameter	Description
Link	

Parameter	Description
Text	This text is subsequently linked in the mailing.
Alignment	You can position the link to the right, left, or center.
Link to comments	
Text	This text is subsequently linked in the mailing.
Alignment	You can position the link to the right, left, or center.
Image	
Position	The image can be positioned in a separate column next to the heading where it follows the text, or in a separate column under the heading but next to the text. These positions are recommended in most cases. If you are using large images that take up the entire available width, you can position them centered under the heading, under the text, or below the link.

Options

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.

Parameter	Description
Background color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Space between the items	To create height between the items, enter an integer value (pixels). By default, the first number in the **Padding** option is used. This option is only enabled when using the standard layout.
Layout	In the **RSS feeds** Tab in the [general settings](#), specify the layouts for the RSS feed items. If there is no content available for the selected layout, the default layout is used.
Border	
Show	Check to apply a border around the paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel

Parameter	Description
	- 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right - 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Table of contents	
Show in Table of Contents	Select to display the paragraph in the table of contents for the section.
Area	Select whether the table of contents should display the heading of the RSS feed paragraph or the titles of individual articles in the RSS feed.
Alternative table of contents entry	Optional: If you select the option **Show the heading of the RSS feed paragraph in the table of contents** under **Area**, you can change the heading of the RSS feed paragraph displayed in the table of contents.

Click profiles

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them more than one target group is selected, just one must match (OR logic). See Target groups.

Retrieving an RSS feed

1. In the menu bar of the RSS feed paragraph, click the **RSS symbol** .
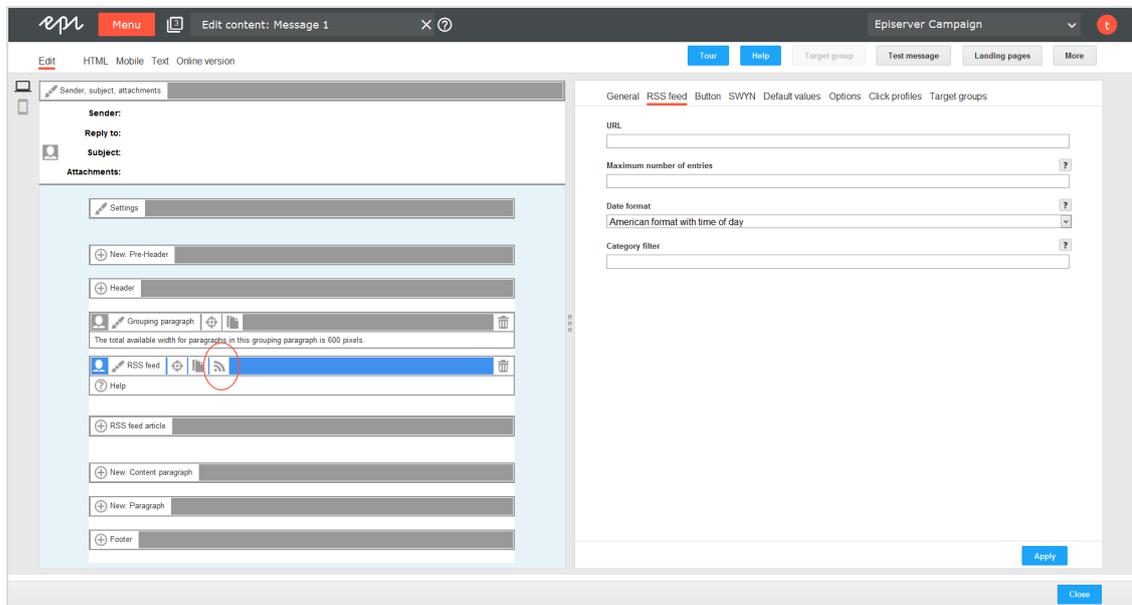
An information window opens. You are asked to confirm the retrieval of the RSS feed.

> **Note:** If you previously retrieved the RSS feed, the previously loaded and possibly edited content is overwritten with the current RSS feed content.

2. Click **Next**. The loaded RSS feed items are displayed to the left in the preview.

Editing an RSS feed

1. In the menu bar of the corresponding RSS feed item, click **RSS feed**. On the right side, a window for editing the content of the RSS feed item opens.
2. Edit to the RSS items as desired.
3. Click **Apply**. The updated content is displayed to the left .

> **Note:** If you click **RSS** in the menu bar of the RSS feed paragraph, the RSS feed is retrieved again, and any edited feed articles are overwritten with the current feed content. So, if you modify RSS feed articles, only click **RSS** if you want to reset the changes.

Recommendations paragraph

Recommendation generators let you send individualized recommendations in real time mailings, any time a recipient accesses a mailing. Recommendations are based on recipient history and algorithms and retrieved via a URL. Depending on the provider, one or more URLs are made available to each recipient, which they can use to access a variety of elements:

- Product pictures
- Name of a product and other text (shown as graphics)
- Link to a product landing page

The recommendation paragraph contains input fields for these URLs for multiple recommendations, providing you with additional layout options. You can place a recommendation paragraph within the header and footer area and inside grouping paragraphs. The **Template Kit** can contain multiple recommendation paragraphs. However, the recommendation provider can only provide a limited number of recommendations for a recipient.

> **Note: Fallback for new recipients and incomplete URLs**
>
> Store a fallback for your provider so new recipients with no history are shown a recommendation and so URLs with missing or incorrect parameters can be

compensated for. Otherwise, an empty image placeholder might appear in the mailing, because no graphic could be retrieved from the recommendation server.

Formatting recommendation URLs

URLs for recommendations include multiple parameters that identify a customer, recipient, layout, type (text, image, or link), and number of recommendations (for more than one). A recommendation is only generated if parameters are generated correctly.

The following URL structure is an example. See the provider you have selected for details.

```
http://host:port/rde_server/res/[NL-RDE-ID]/newsletter/recomm/[Name-of-newsletter-template]/usr/
[User-ID] ?requestType=textImage&recoIndex=[Index]&channel=NL
```

- **NL-RDE-ID**. Your customer ID; you receive this from the recommendation provider.
- **Name-of-newsletter template**. The template determines the recommendation stored for the recommendation provider.

  > **Note:** You cannot modify the first two parameters.

- **User ID**. The recipient ID, used to generate individual recommendations.
- **Index**. Process multiple recommendations for each recipient. Use this parameter to select the corresponding, consecutive paragraph number.

Creating a recommendations paragraph

1. While editing the content of a mailing in the Template Kit, click **New: Content paragraph**. A window for selecting the paragraph type opens on the right side.

   > **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.
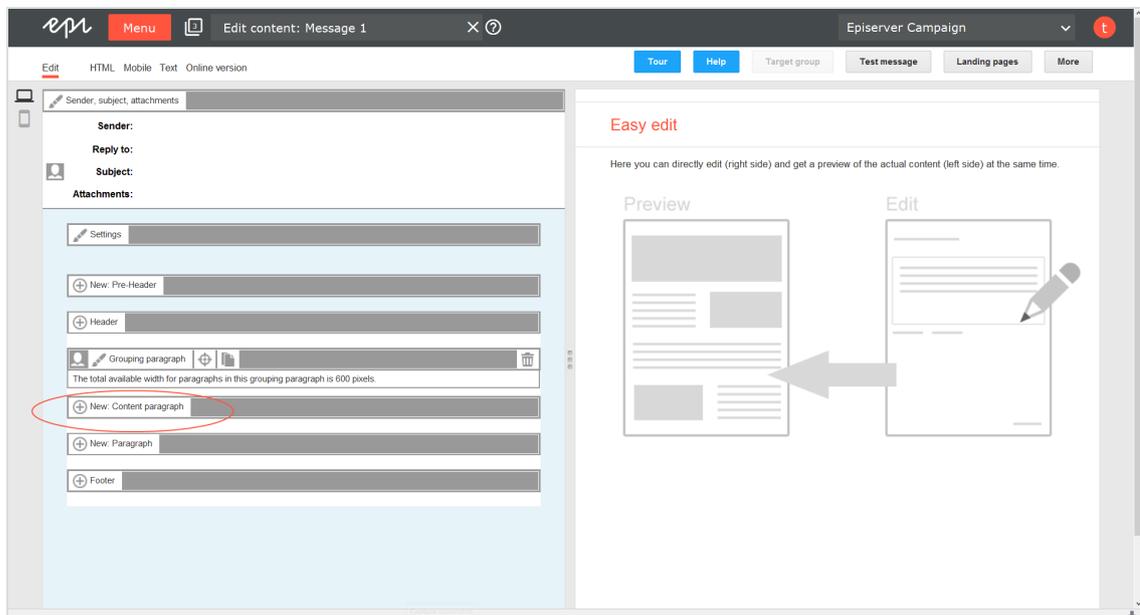
2. Click **Recommendations**. The configuration window for the selected paragraph type opens.
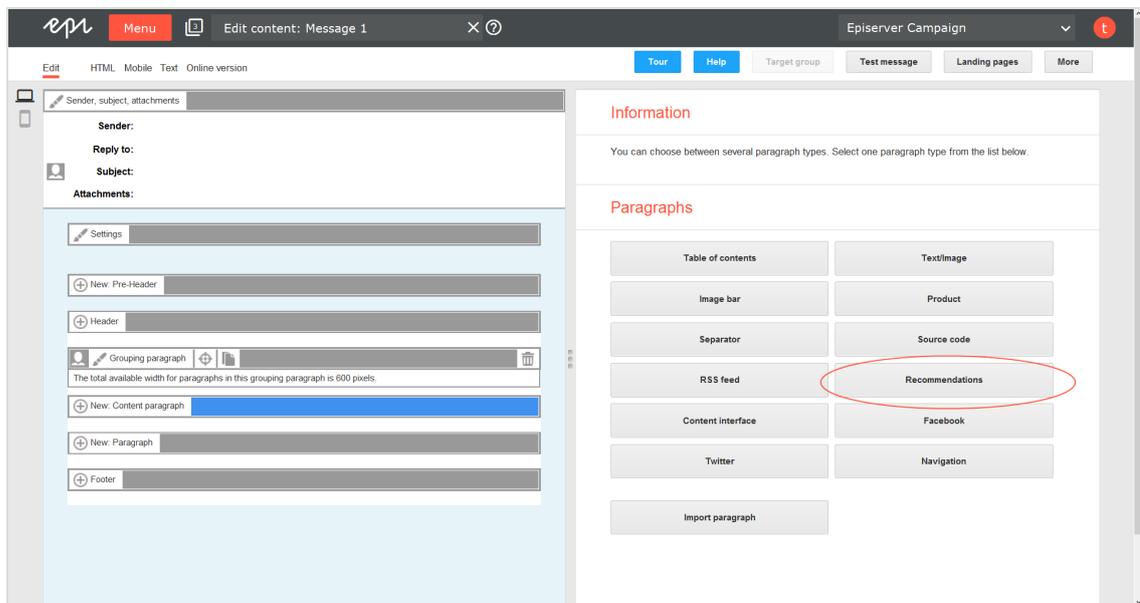
3. Click **Apply**. The new recommendation paragraph appears on the left.
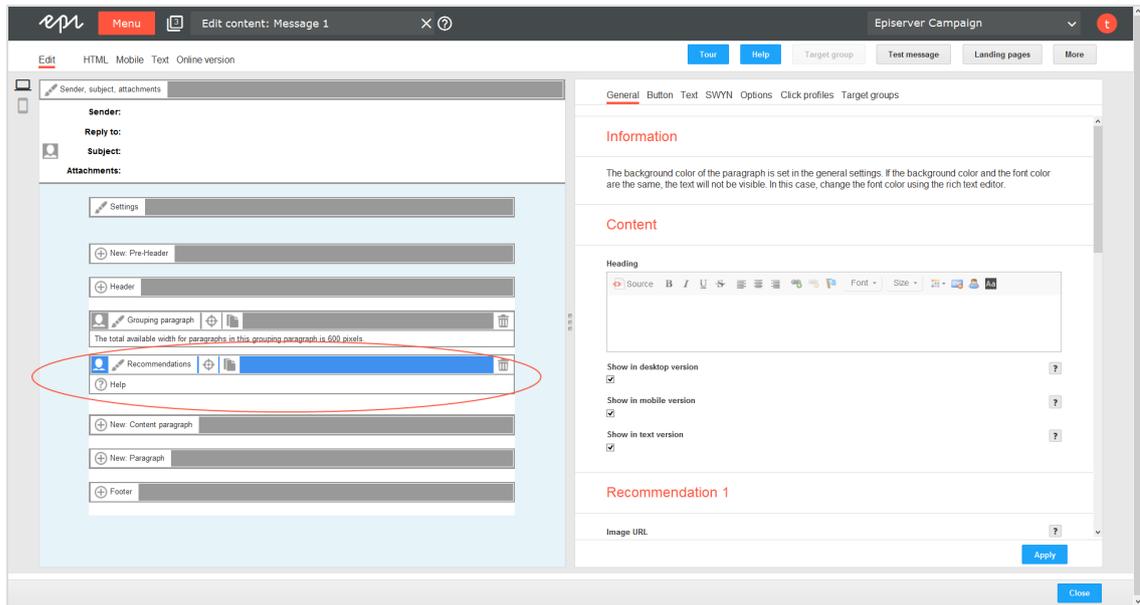
Configuring a recommendation paragraph

1. On the left side of the preview, in the menu bar of the recommendation paragraph, click **Recommendations**.The configuration window opens on the right.

2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.

   - [General](#)
   - [Button](#)
   - [Text](#)
   - [SWYN](#)
   - [Options](#)
   - [Click profiles](#)
   - [Target groups](#)

General

Parameter	Description
Contents	
Heading	Enter a paragraph caption.
Show in desktop version	Select to include this paragraph in the desktop mailing.
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in text version	Select to show the paragraph in the text version of the mailing.
Recommendation 1-5	

Parameter	Description
Image URL	Enter the URL used to generate the product image that appears in a mailing. The height and width of the graphic is set by the recommendation provider and cannot be adjusted to fit the template.
Text URL	Enter the URL used to generate the product name that appears in a mailing. The text is displayed as a graphics file. The height and width of the graphic is set by the recommendation provider and cannot be adjusted to fit the template.
Link	Enter the URL used to generate a link to the product landing page that appears in a mailing. The layout of the links (color, text and so on) is set by the recommendation provider and cannot be adjusted to fit the template.

Button

See [Click2Go](#).

Text

Recommendations are incorporated into mailings as graphics and are not displayed in the text version – except for the caption, if one is provided. Instead, you can enter a substitute text to use in the text version of the mailing. If you do not want the paragraph to appear in the text version, disable the **Show in text version** option in the **General** tab.

Parameter	Description
Text	Enter alternate text to use in the text version of a mailing. Recommendations will not appear in the text version, except for the caption.

SWYN

You can enable the SWYN function for social networks individually for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Twitter	

Parameter	Description
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
MySpace	
Parameters for MySpace are identical to Facebook's.	
Xing	
Parameters for Xing are identical to Twitter's.	

Options

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Recommendation layout	Images and text used in a recommendation can be placed next to or on top of each other. Bear in mind the available width when changing the layout.
Space between image and text	Specify (in pixels) how much space there should be between image and text in a recommendation.

Parameter	Description
Space between the recommendations	Specify (in pixels) how much space there should be between multiple recommendations. This value is irrelevant if you are only inserting one recommendation.
Arrangement	Indicate whether multiple recommendations should be placed next to each other in one paragraph (for example, in the main body of the text space) or on top of each other (for example, in the sidebar next to the main body of the text space). This value is irrelevant if you are only inserting one recommendation.
Alignment	Specify how the recommendations should be arranged in a paragraph. This value is only applied if the width of recommendations is less than the width available in the main body of the text space.
Background color	The background color is given as a Hex code. To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Image	
Width	Enter the width of the product image. If you do not enter anything here, the image's original width is used.
Height	Enter the height of the product image. If you do not enter anything here, the image's original height is used.

Parameter	Description
Product description	
Width	Enter the width of the product description. If you do not enter anything here, the text's original width is used.
Height	Enter the height of the product description. If you do not enter anything here, the text's original height is used.
Border	
Show	Select if you want to apply a border around the entire paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: 1 = sides uniform with 1 pixel 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by # (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Maximum width of the text image	The maximum width is entered as a percentage. It only takes effect if the text is positioned to the left or the right of the image. The value must be between 10 and 90. By default, a maximum width of 50 % is used.

Parameter	Description
Table of contents	
Show in table of contents	Check to display the paragraph in the table of contents for the section.
Alternative table of contents entry	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click profile	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups.

Facebook paragraph

> **Note:** Contact customer support to activate this feature.

Use the Facebook paragraph to integrate up to 25 current Facebook posts into a message. Keep recipients up-to-date with exciting topics from your social network.

Decide whether Episerver Campaign updates the Facebook paragraph every time you send a message and automatically loads the latest posts from your Facebook timeline, or whether Episerver Campaign only displays Facebook posts you defined when creating or modifying the campaign.

- **Dynamic integration**. Displays your latest social media activities. However, you cannot permanently [delete](#) or [edit](#) posts in the Facebook paragraph. If you remove or edit Facebook timeline posts from the Facebook paragraph, those posts are reloaded into the Facebook paragraph when the mailing is sent.

- **Static integration**. Provides more control over posts that appear in the Facebook paragraph. When creating a message, you can [manually update](#) which posts to integrate. You can delete individual posts. When the mailing is sent, Episerver Campaign does not update the Facebook paragraph from your Facebook timeline. Changes can be made but do not happen automatically.

> **Tip:** By default, Episerver Campaign integrates Facebook posts statically. To use dynamic integration, contact [customer support](#) to change the default integration.

Creating a Facebook paragraph

1. While editing the content of a mailing in the [Template Kit](#), click **New: Content paragraph**. A window for selecting the paragraph type opens on the right side.

   > **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.
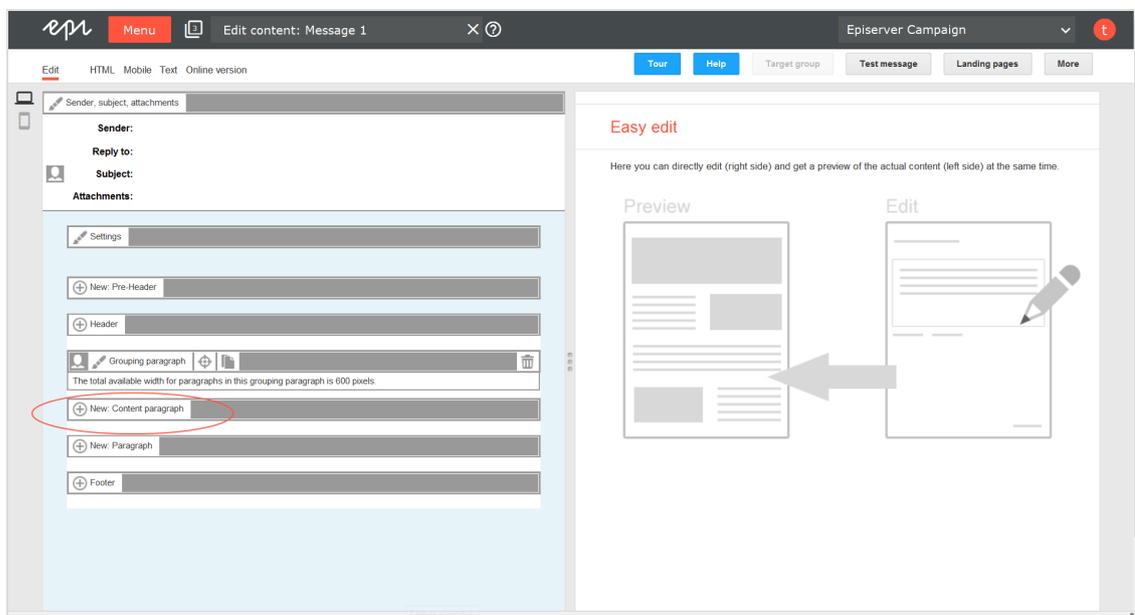
2. Click **Facebook**. The configuration window for the selected paragraph type opens.
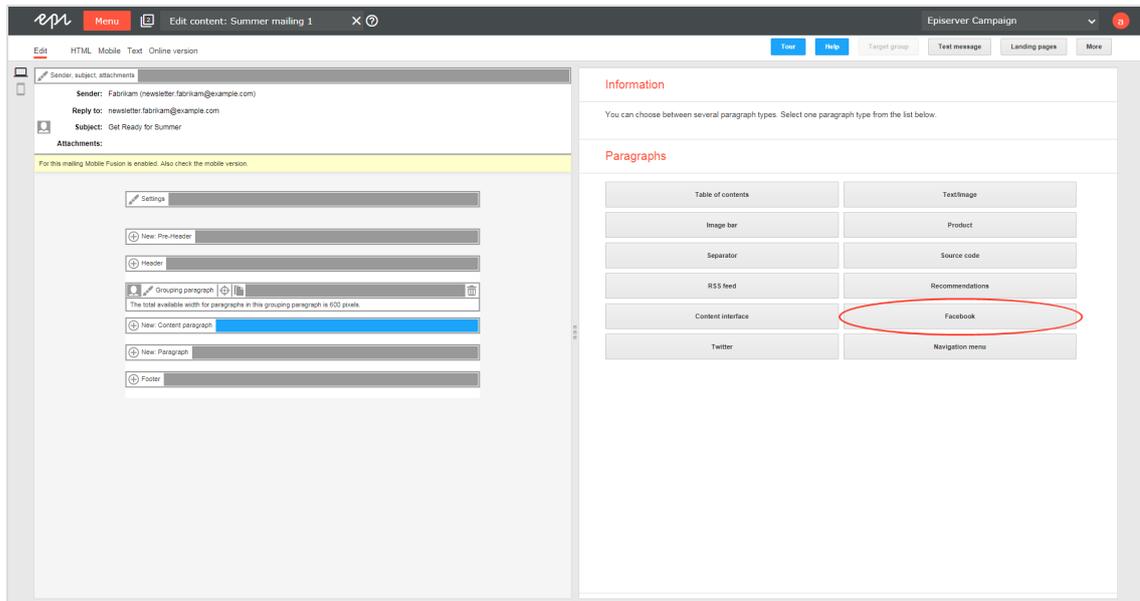
3. Click **Apply**. The new Facebook paragraph appears on the left side in the preview window.
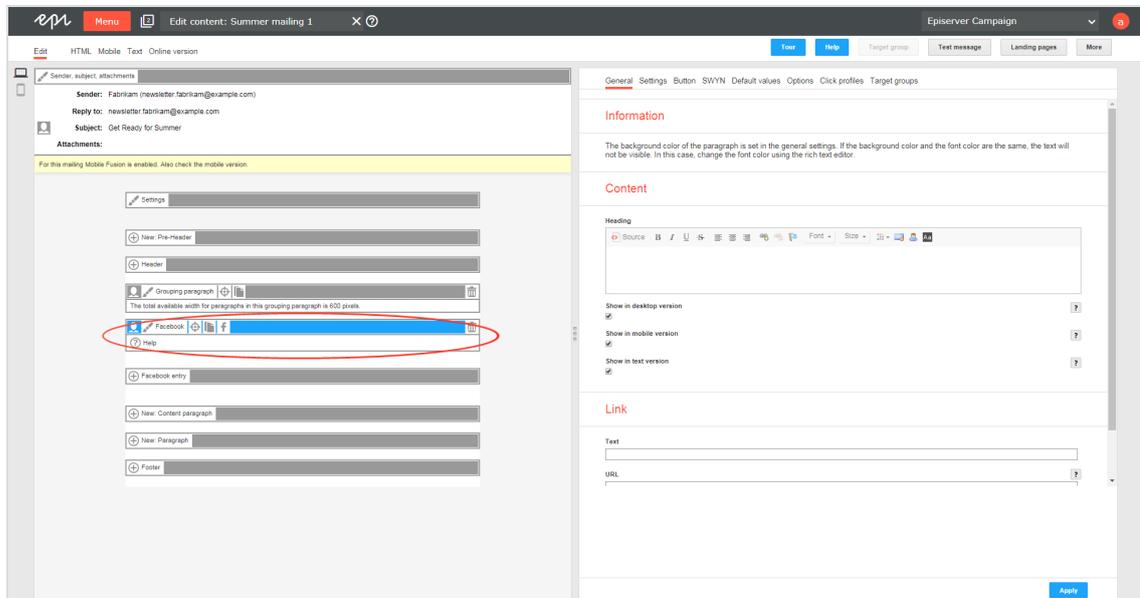
Configuring a Facebook paragraph

1. On the left side of the preview, in the menu bar of the Facebook paragraph, click **Facebook**. The configuration window opens on the right side.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.

- [General](#)
- [Settings](#)
- [Button](#)
- [SWYN](#)
- [Default values](#)
- [Options](#)
- [Click profiles](#)
- [Target groups](#)

General

Parameter	Description
Content	
Heading	Enter a heading for the paragraph.

Parameter	Description
Show in desktop version	Select to include this paragraph in the desktop mailing.
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in text version	Select to show the paragraph in the text version of the mailing.
Link	
Text	This text is subsequently linked to in the mailing.
URL	Enter a link , such as the starting page or your public Facebook profile.
Orientation	Position the link on the right, left, or center.

Settings

Parameter	Description
Account name	Enter your public Facebook user name, which is the name used in the web address for your Facebook timeline. It is the last part of the URL: https://facebook.com/*User name*. **Warning:** If the display of your Facebook page is limited to specific countries, Facebook posts will not load if you or your recipients are located outside of the countries for which the display is allowed.
Maximum number of entries	Enter the maximum number (up to 25) of Facebook posts to be displayed in your message.

Parameter	Description
	Tip: If you enter 0 or leave this field blank, a default value of 10 Facebook posts are used. If fewer than 10 posts are available in your Facebook account, fewer posts are retrieved and displayed. Also, if you are using static integration, changing this value has no effect on any posts already retrieved. You must manually update the Facebook paragraph for the new number of posts to take effect.
Date format	In the drop-down list, select a date format to be displayed next to your Facebook posts. **Tip:** If using static integration, changing the date format has no effect on Facebook posts that have already been retrieved. You must manually update the Facebook paragraph for a date format change to take effect.

Button

See Click2Go.

SWYN

You can enable the SWYN function for social networks individually for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.

Parameter	Description
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 × 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 × 100 pixels if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If

Parameter	Description
	you enter nothing here, the standard title is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
MySpace	
Parameters for MySpace are identical to Facebook's.	
Xing	
Parameters for Xing are identical to Twitter's.	

Default values

Parameter	Description
Link	
Text	Facebook posts in your messages are automatically linked to the original Facebook post. To clarify this for your recipients and to highlight links, add additional text, such as *More information on our Facebook page* or *Go to original post on Facebook*. Enter your text into the airfield you do not want to point out that the Facebook post in your mailing will lead to your Facebook page, leave the field blank. **Tip:** Text entered here is added to Facebook posts and appears with each Facebook post in the message.
Orientation	The text can be aligned to the right, left or center.
Image	
Position	From the drop-down list, select the position where images associated with your Facebook post

Parameter	Description
	will display. **Tip:** If your Facebook post contains several images, the first image from the post is assiduous cannot display subsequent images.

Options

You can give each content paragraph a different appearance from the general layout.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Background color	The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.

Parameter	Description
Space between articles	A space with this height is placed between individual admissible default, the first number in the **Padding** option is osteopathic option is only enabled when using the standard layout.
Layout	Select a layout for your Facebook posts. You can choose between the supplied standard layout and up to two user-defined absolutist use a custom layout, set it up in advance in the general settings in the **Facebook** evadable you select a user-defined layout list that you have not configured, the standard layout is automatically asceticism **Facebook Layouts**.
Border	
Show	Select if you want to apply a border around the entire paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Table of contents	

Parameter	Description
Show in table of contents	Select to display the paragraph in the table of contents for the section.
Alternative table of contents entry	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click professionalize Click profiles.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them more than one target group is selected, just one must match (OR logic). See Target groups.

Loading Facebook posts

1. In the menu bar of the Facebook paragraph, click **Load Facebook posts** .
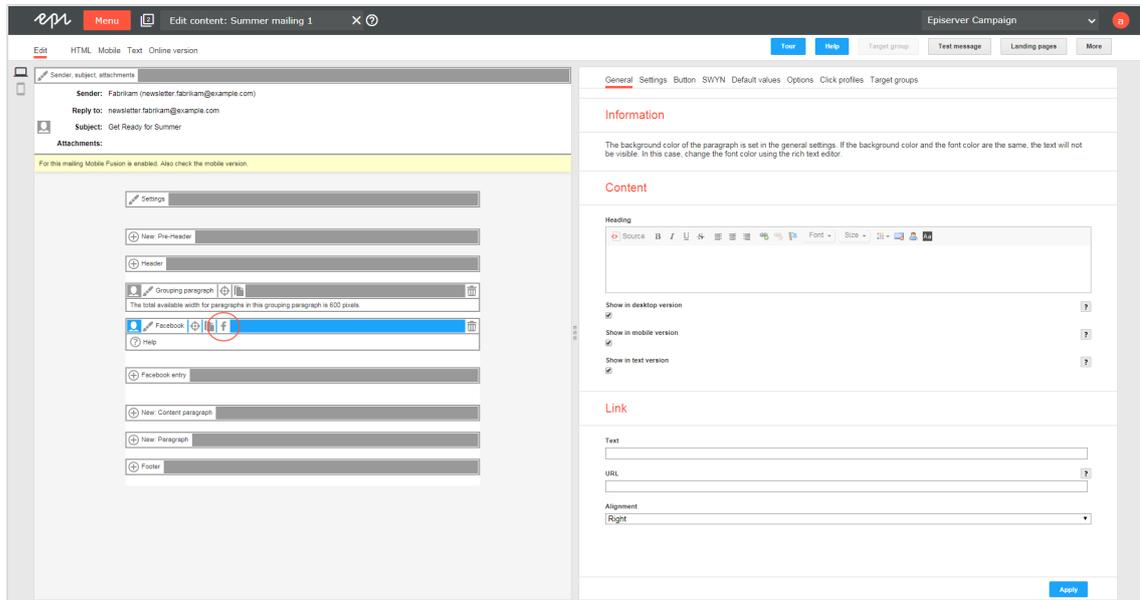
2. Confirm that you want to load your Facebook posts by clicking **Continue**.

> **Warning:** If the display of your Facebook page is limited to specific countries and you are located outside of these countries, Facebook posts will not load successfully.

Updating Facebook posts manually

1. To manually update your Facebook posts, in the menu bar of the Facebook paragraph, click **Load Facebook posts** .
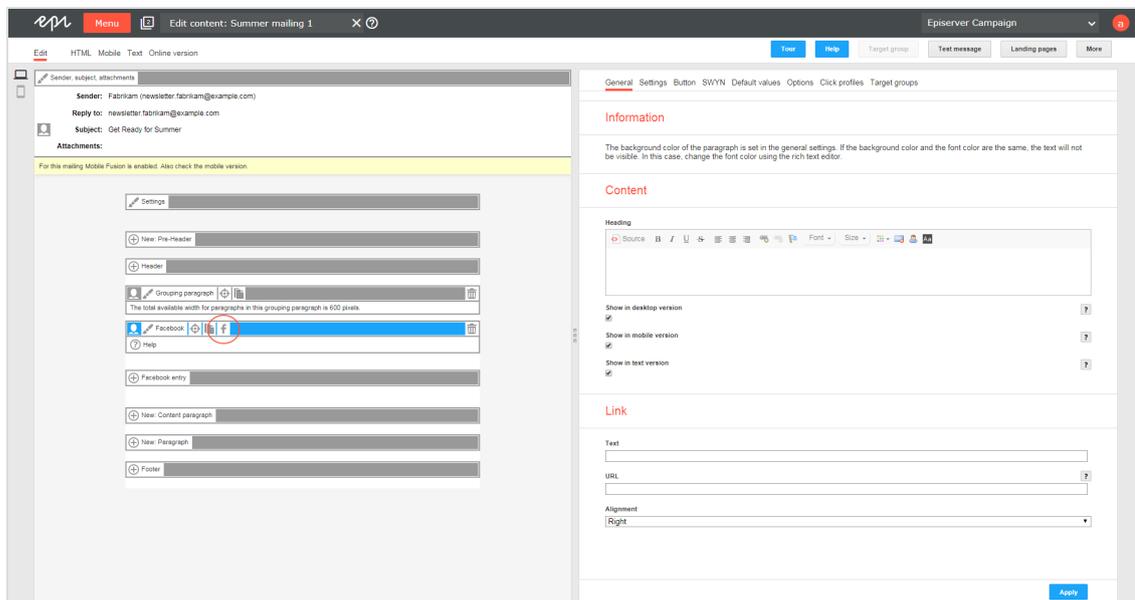
2. Click **Continue**.

Editing Facebook posts

You can edit your Facebook posts individually after loading them into your mailing.

1. In the menu bar of the corresponding Facebook post, click **Facebook entry**. The configuration window opens on the right.
2. Change the settings according to your needs. Confirm by clicking **Apply** in the lower right corner.

> **Note:** If you manually update posts in the Facebook paragraph, the posts are reloaded from your Facebook timeline, overwriting any manual changes to the Facebook posts. If you are using dynamic integration, manual changes to Facebook posts are overwritten when the mailing is sent.

Deleting Facebook posts

1. In the menu bar of the Facebook post you want to delete, click **Delete** 🗑 .
2. Confirm your selection by clicking **OK**.

> **Note:** If you manually update posts in a Facebook paragraph, previously deleted posts are reloaded unless they were also deleted from your Facebook timeline. If you are using dynamic integration, deleted Facebook posts are automatically reloaded

> into your message when the mailing is sent.

Facebook layouts

This topic describes:

- how customer support **sets up** alternative HTML layouts
- how to **select** alternative layouts in the Facebook paragraph
- how to **edit** alternative layouts using knowledge of HTML, CSS, and Velocity

To receive up to 2 alternative layouts, contact **customer support**.

To create HTML layouts, set up alternative layouts for mobile and text versions also. If no alternative layouts are saved for those versions, the standard layout is used.

> **Note:** In some cases, some text elements will not be in the order that you want.

Selecting a layout

1. To select a standard layout or an alternative layout, while editing a message in the **Template Kit**, on the left side of the preview, in the menu bar of the Facebook paragraph, click **Facebook**. The configuration window opens on the right side.

2. Click the **Options** tab.
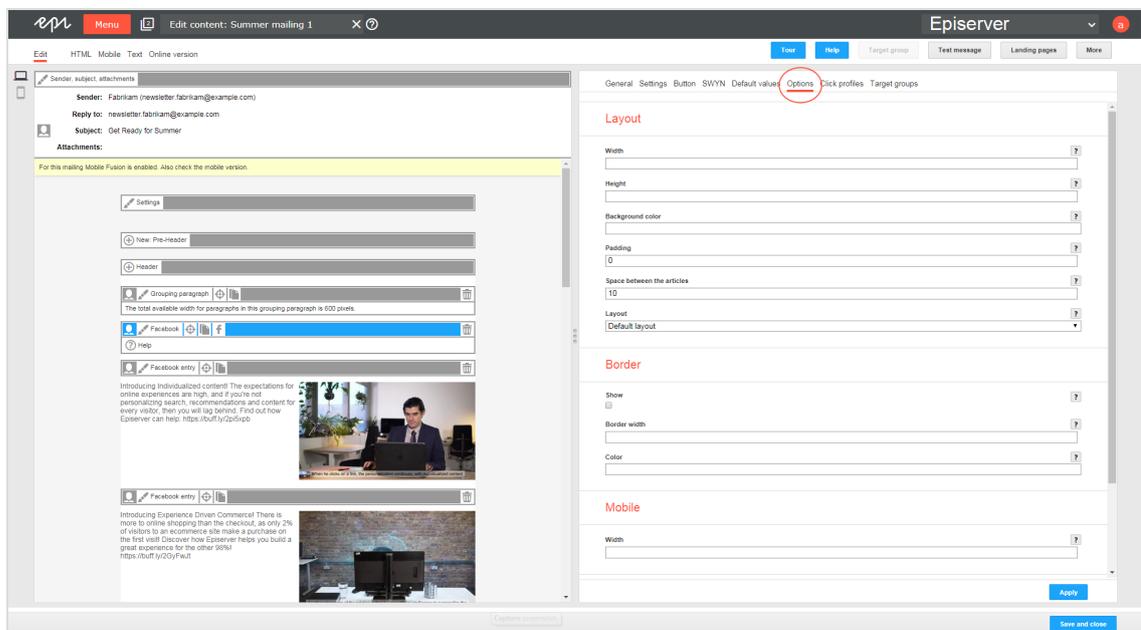
3. In the **Layout** area, in the **Layout** drop-down list, select the layout you want to use.
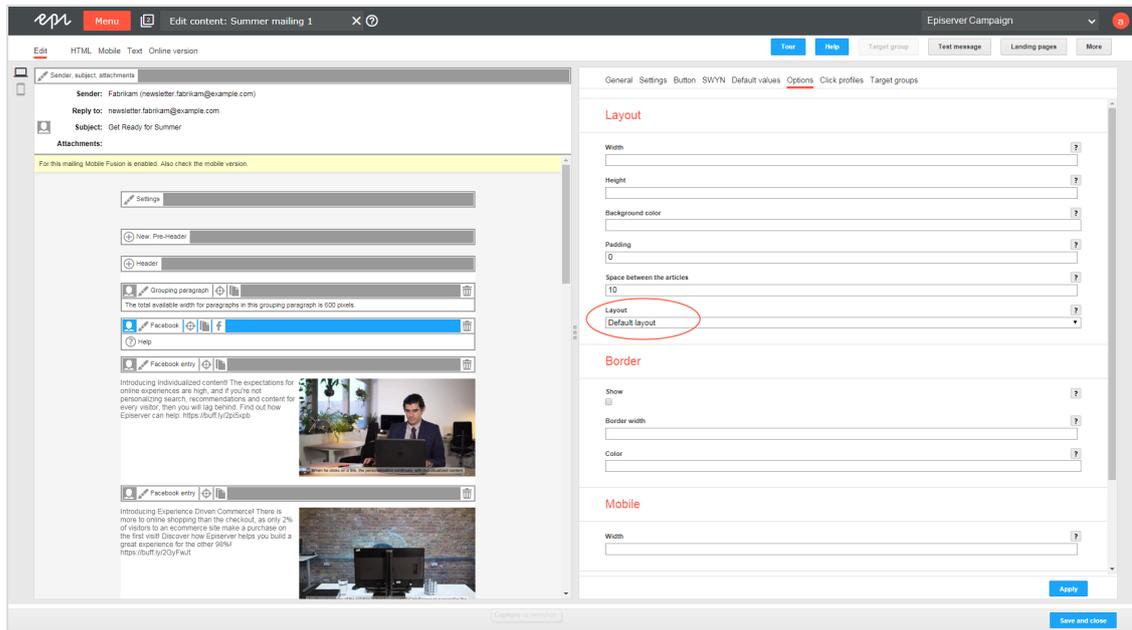
4. Click **Apply**. On the left side of the preview, the formatting of your Facebook paragraph changes accordingly.

Editing a layout

You can edit alternative layouts but not the standard layout.

> **Warning:** If you lack in-depth knowledge of HTML, CSS and Velocity, contact [customer support](#) to change alternative layouts. If you edit these layouts without in-depth knowledge, serious display errors may occur in your mailings.

1. To edit alternative layouts, in the preview on the left, click **Settings**. The configuration window opens on the right.
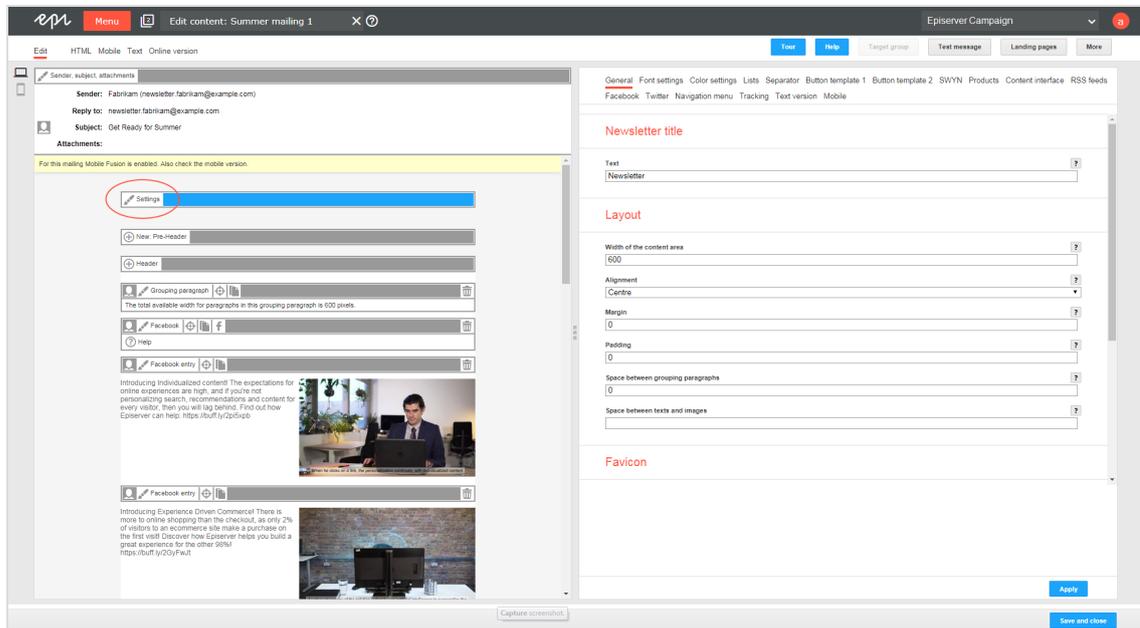
2. Open the **Facebook** tab. Each layout has source text fields for the desktop, mobile, and text versions.
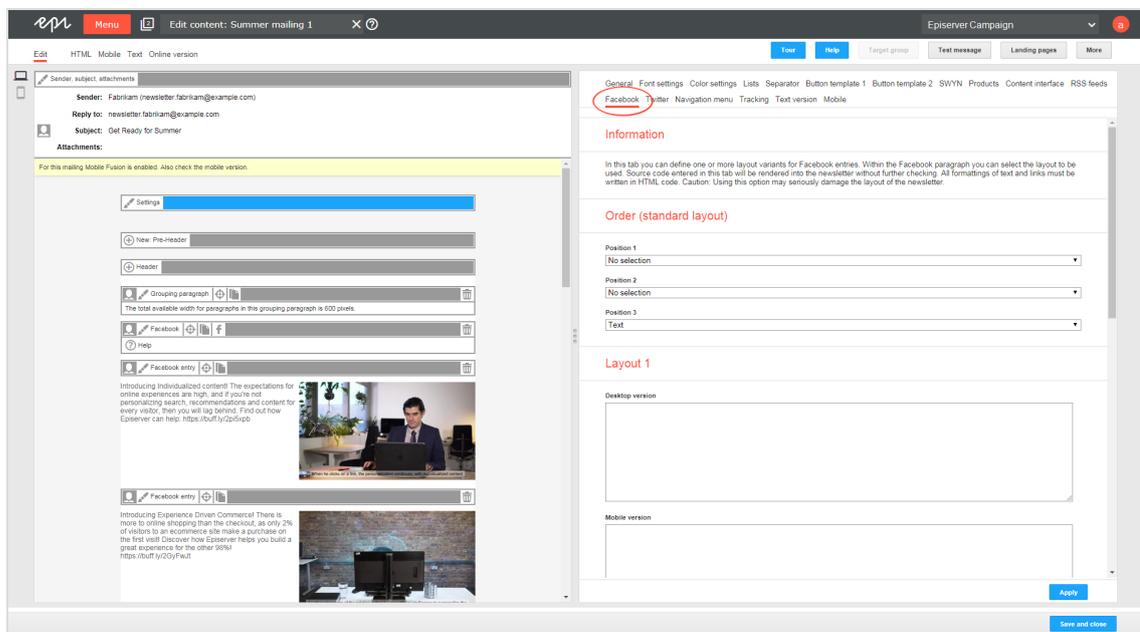
3. Edit the source text of the corresponding layout according. Under **Inserting content**, read how to place the various content items.

> **Note:** Set up alternative layouts for mobile and text versions also. If no alternative layouts are stored for these versions, the standard layout is used.

4. Click **Apply**. On the left, the formatting of your Facebook paragraph changes accordingly.

Inserting content

Access the content of the Facebook paragraph using Velocity variables and format the transferred content using HTML style attributes.

The following Velocity variables are available:

- **Status**. Information on current item paragraphs
- **Present**. For using queries that check for the presence of an element
- **Value**. For issuing the content

Notes for the creation of new layouts

- **Font definitions**. If you are using an alternative layout variant, font definitions must exist in the HTML you entered. The texts are not formatted by the Template Kit to give you complete freedom in visual design.
- **Widths**. Specify a fixed width or a width in percent. You should enter a percentage, because this prevents elements from sticking out of the layout.
- **Danger of display errors**. Note that you must have a good knowledge of HTML, as the HTML code you enter is not validated by Episerver Campaign. If you enter incorrect HTML code, serious display errors may occur.

Status variables

Variable	Type	Description
$facebookItemFirst	Boolean	Is true if it is the first post in the Facebook paragraph, or is otherwise false.
$facebookItemIndex	Integer	Contains the position of the post within the Facebook paragraph as a number (1 for the first post, 2 for the second post and so on).
$facebookItemLast	Boolean	Is true if it is the last post in the Facebook paragraph, or is otherwise false.

Present variables

Variable	Type	Description
$facebookTextPresent	Boolean	Contains true if there is content for the **Text** box, or otherwise false.
$facebookAuthorPresent	Boolean	Contains true if there is content for the **Author** box, or otherwise false.
$facebookDatePresent	Boolean	Contains true if there is content for the **Date** box, or otherwise false.
$facebookLinkTextPresent	Boolean	Contains true if there is content for the **Text** box in the **Link** area, otherwise false.
$facebookLinkUrlPresent	Boolean	Contains true if there is content for the **URL** box in the **Link** area, otherwise false.
$facebookImageUrlPresent	Boolean	Contains true if there is content for the **Image** box in the **Image** tab, otherwise false.
$facebookImageAltTextPresent	Boolean	Contains true if there is content for the **Alternative text** box in the **Image** tab, otherwise false.
$facebookImageLinkPresent	Boolean	Contains true if there is content for the **Link** box in the **Image** tab, otherwise false.

Value variables

Variable	Typ	Description
$facebookTextValue	String	Contains the content of the **Text** box.

Variable	Typ	Description
$facebookAuthorValue	String	Contains the content of the **Author** box.
$facebookDateValue	String	Contains the content of the **Date** box.
$facebookLinkTextValue	String	Contains the content of the **Text** box in the **Link** area.
$facebookLinkUrlValue	String	Contains the content of the **URL** box in the **Link** area.
$facebookImageUrlValue	String	Contains the image URL from the **Image** tab.
$facebookImageAltTextValue	String	Contains the content of the **Alternative text** box in the **Image** tab.
$facebookImageLinkValue	String	Contains the content of the **Link** box in the **Image** tab.
$editBar	String	Inserts the paragraph's button bar. This is required to integrate the button bar into the table, such as when implementing adjacent items. If this variable is not available, the button bar is placed above the item.

Twitter paragraph

> **Note:** Contact customer support to activate this feature.

Use the Twitter paragraph to integrate up to 20 current tweets into your messages. Keep your recipients up-to-date with exciting topics from your social network.

Decide whether Episerver Campaign updates the Twitter paragraph every time you send a message and auto-matically loads the latest tweets from your Twitter timeline, or if Episerver Campaign only displays tweets you defined when creating or modifying the campaign.

- **Dynamic integration**. Displays your latest social media activities. However, you cannot permanently delete or edit individual tweets in the Twitter paragraph. If you remove or edit tweets in the Twitter paragraph

which are still present in your Twitter timeline, the removed or edited tweets are reloaded when the mailing is sent and inserted into the Twitter paragraph.

● **Static integration**. Provides more control over the tweets in the Twitter paragraph. When creating a mailing, you can select which of your current tweets should be integrated. You can delete individual tweets. When the mailing is sent, Episerver Campaign does not update the Twitter paragraph from your Twitter timeline. Changes can still be made, but do not happen automatically. When using static integration, you can update tweets manually.

> **Tip:** By default, Episerver Campaign integrates your tweets statically. To use dynamic integration, contact customer support.

Creating a Twitter paragraph

1. While editing the content of a mailing in the Template Kit, click **New: Content paragraph**. A window for selecting the paragraph type opens on the right side.

> **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.
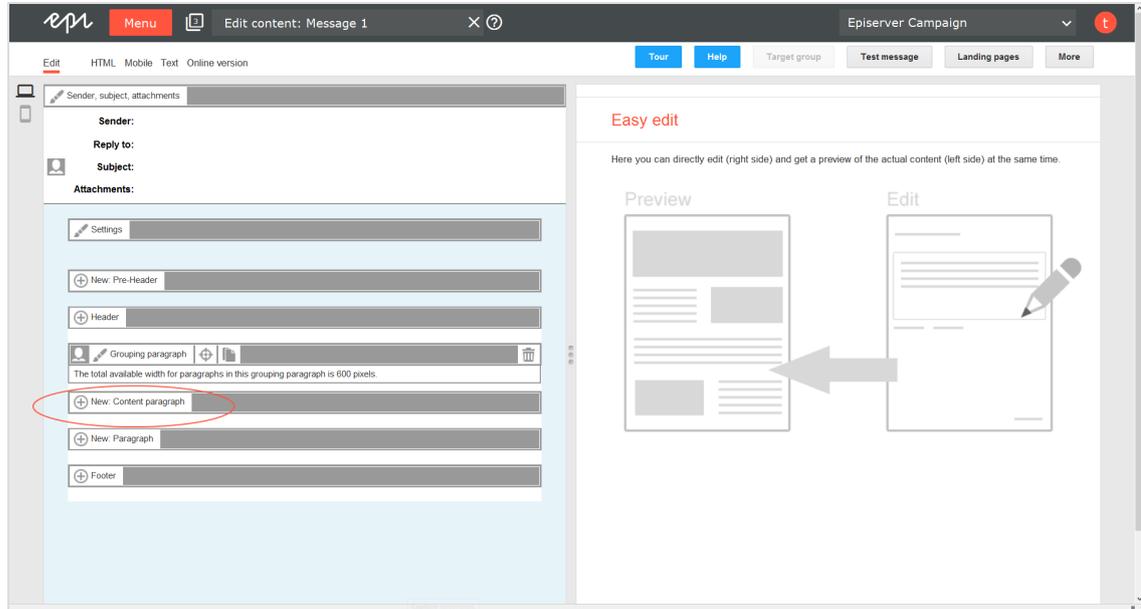
2. Click **Twitter**. The configuration window for the selected paragraph type opens.
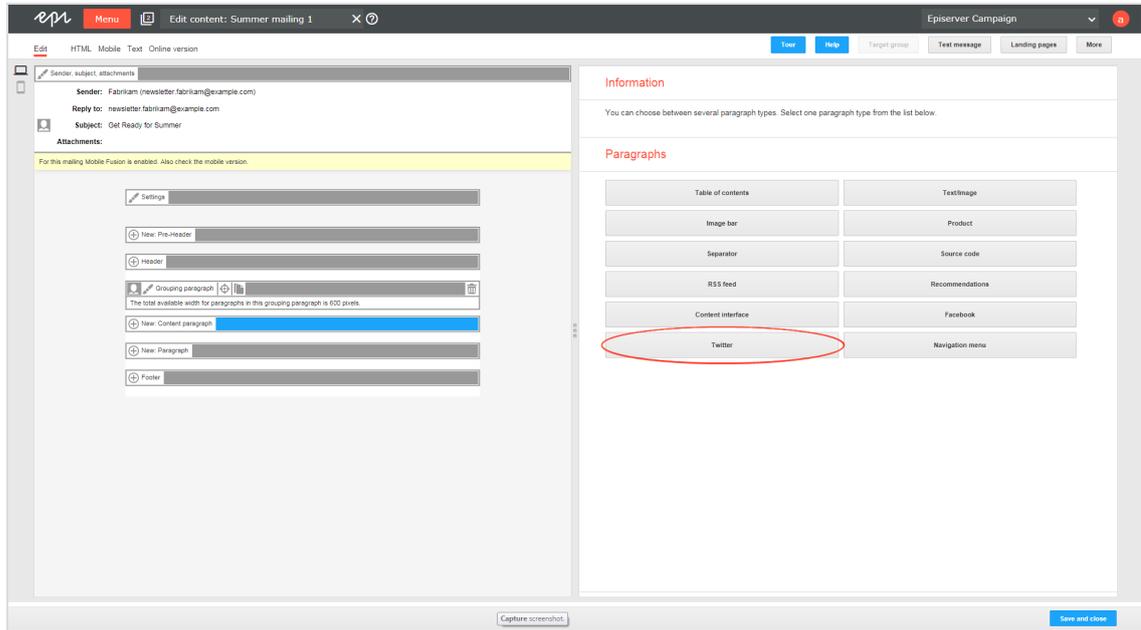
3. Click **Apply**. The new Twitter paragraph appears on the left.
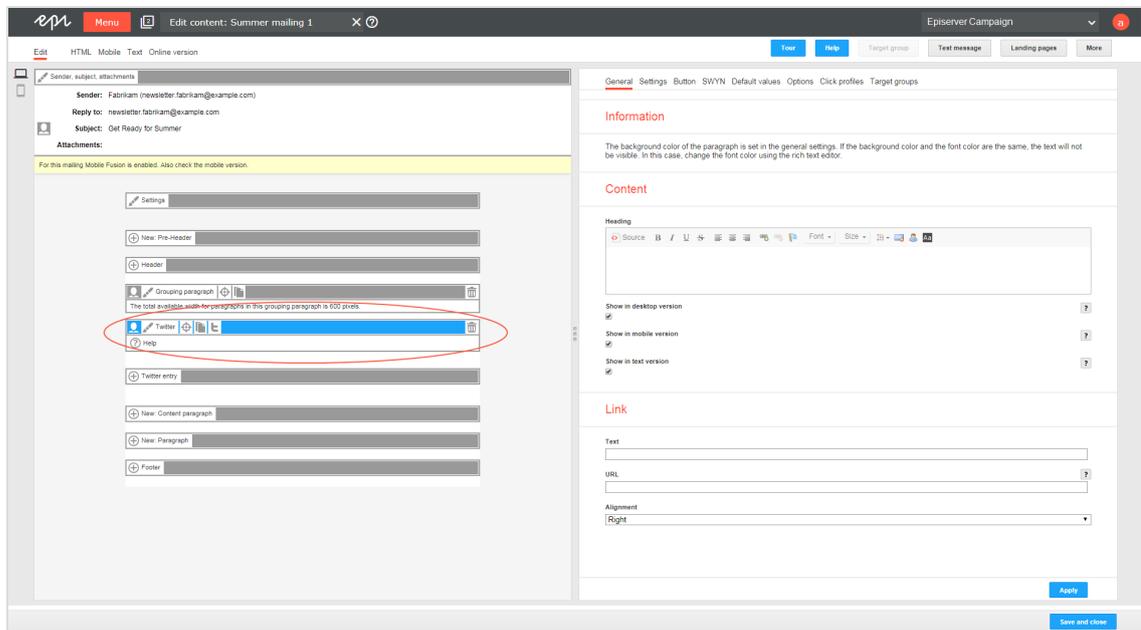
Configuring a Twitter paragraph

1. On the left side of the preview, in the menu bar of the Twitter paragraph, click **Twitter**. The configuration window opens on the right.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.

- General
- Settings
- Button
- SWYN
- Default values
- Default values
- Options
- Click profiles
- Target groups
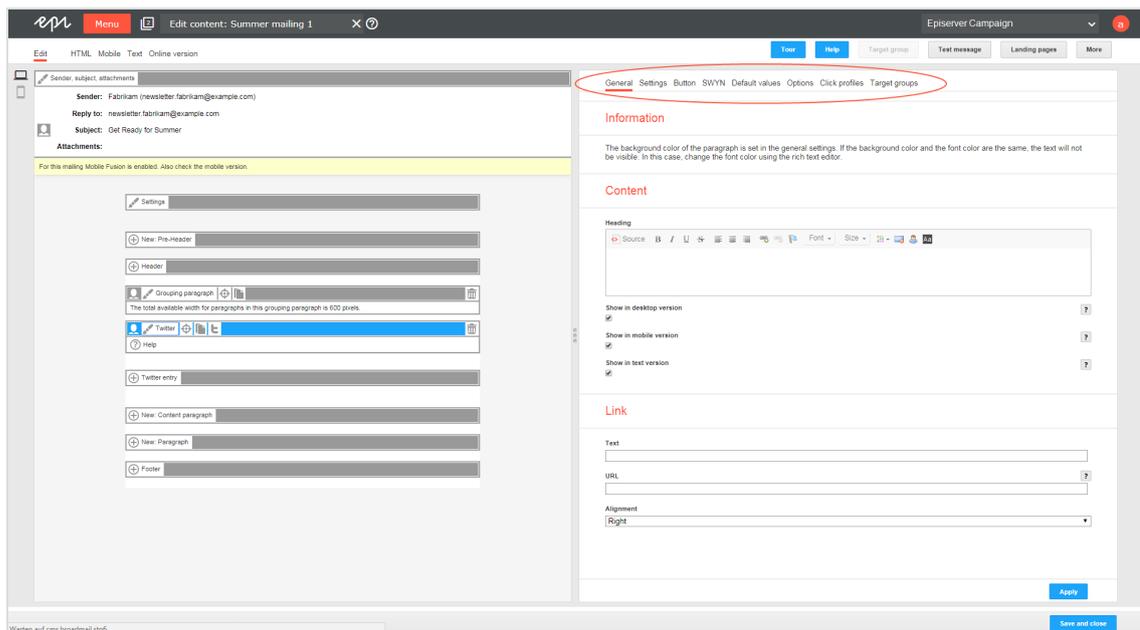
General

Parameter	Description
Content	

Parameter	Description
Heading	Enter a heading for the paragraph.
Show in desktop version	Select to include this paragraph in the desktop mailing.
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in text version	Select to show the paragraph in the text version of the mailing.
Link	
Text	This text is subsequently linked to in the mailing.
URL	Enter a link here (for example, the landing page for the product group).
Orientation	Position the link on the right, left, or center.

Settings

Parameter	Description
Account name	Enter your public Twitter user name, the name used in the web address for your Twitter timeline. It is the last part of the URL: https://twitter.com/*User name*.
Maximum number of entries	Enter the maximum number of tweets that should be displayed in your message. The maximum value for this is 20 tweets. If you enter 0 into this field or leave it empty, a default value of 10 tweets is used (if fewer than 10 tweets are available in your Twitter account, those tweets are displayed). Also, when using static integration, changing this value has no effect on any tweets already

Parameter	Description
	retrieved. You must manually update the Twitter paragraph for the new number to take effect.
Date format	In the drop-down list, select a date format to be used next to your tweets. Changing the date format has no effect on tweets that already were retrieved when using static integration. You must manually update the Twitter paragraph for the date format change to take effect.

Button

See Click2Go.

SWYN

You can enable the SWYN function for social networks individually for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger

Parameter	Description
	images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
MySpace	
Parameters for MySpace are identical to Facebook's.	
Xing	

Parameter	Description
Parameters for Xing are identical to Twitter's.	

Default values

Parameter	Description
Link	
Text	Tweets in your message are automatically linked to the original tweet on your Twitter page. To clarify this and highlight links, add additional text, for example, "More information on our Twitter page" or "View original tweet". That text appears with each tweet in your message.
Orientation	The text can be aligned to the right, left or center.
Image	
Position	From the drop-down list, select the position where an image associated with your tweet (if any) should be displayed.

Options

To give each content paragraph a different appearance from the general layout, use the layout configuration in this tab.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.

Parameter	Description
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Background color	The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Space between articles	A space with this height is placed between individual items. By default, the first number in the **Padding** option is used. This option is only enabled when using the standard layout.
Layout	Select a Twitter layout. You can choose between the standard layout and up to two user-defined layouts. To use a custom layout, set it up in advance in the general settings in the Twitter tab. If you select a user-defined layout that is not configured, the standard layout is used.
Border	
Show	Select if you want to apply a border around the entire paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel

Parameter	Description
	• 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Table of contents	
Show in table of contents	Select to display the paragraph in the table of contents for the section.
Alternative table of contents entry	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles. Alternatively, you can allocate individual links to a click profile in the **Tracking** settings for the mailing creation wizard.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See **Target groups**.

Loading Tweets

1. In the menu bar of the Twitter paragraph, click **Load Tweets** .
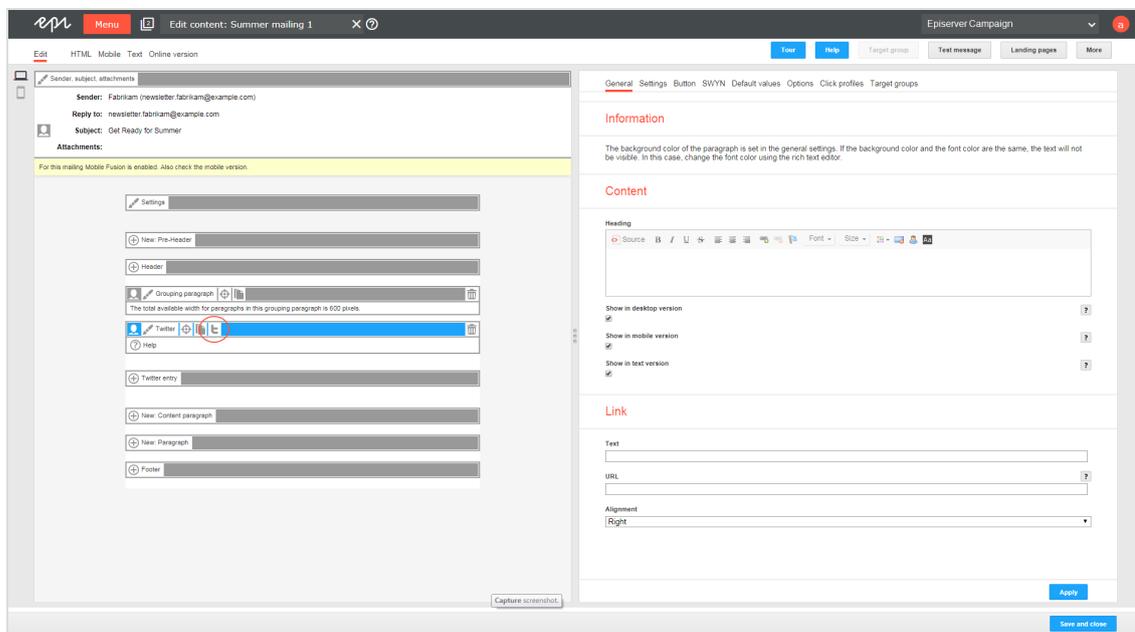
2. Click **Continue**.

Updating tweets manually

You can manually update your tweets in the Twitter paragraph and reload them from your Twitter timeline.

1. In the menu bar of the Twitter paragraph, click **Load Tweets** ![icon] .
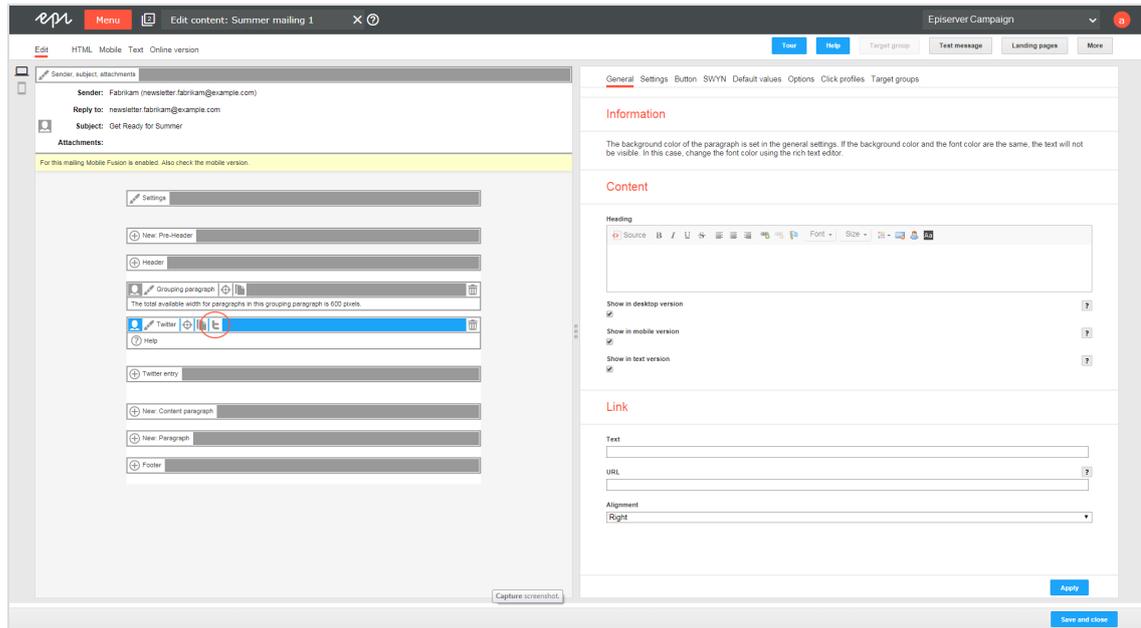
2. Click **Continue**.

Editing tweets

You can edit tweets individually after loading them into your mailing.

1. In the menu bar of the corresponding tweet, click **Twitter entry**. The configuration window opens on the right.
2. Change the settings as needed and confirm your entries by clicking **Apply**.

> **Tip:** If you manually update tweets in the Twitter paragraph, the posts are reloaded from your Twitter timeline, overwriting any manual changes to the tweets. If you are using dynamic integration, manual changes to tweets are over-written when the mailing is sent.

Deleting tweets

1. In the menu bar of the tweet you want to delete, click **Delete** ![icon] .
2. Click **OK**.

Twitter layouts

This topic describes:

- how customer support sets up alternative HTML layouts
- how to select alternative layouts in the Twitter paragraph
- how to edit alternative layouts using HTML, CSS, and Velocity

To receive up to two alternative layouts, contact customer support.

To create HTML layouts, set up alternative layouts for mobile and text versions also. If no alternative layouts are saved for those versions, the standard layout is used.

> Note: In some cases, some text elements will not be in the order that you want.

Selecting a layout

1. To select a standard layout or one of up to 2 alternative layouts, while editing a message in the Template Kit, on the left side of the preview, in the menu bar of the Twitter paragraph, click **Twitter**. The configuration window opens on the right.

2. Click the **Options** tab.

3. In the **Layout** area > **Layout** drop-down list, select the layout you want to use.
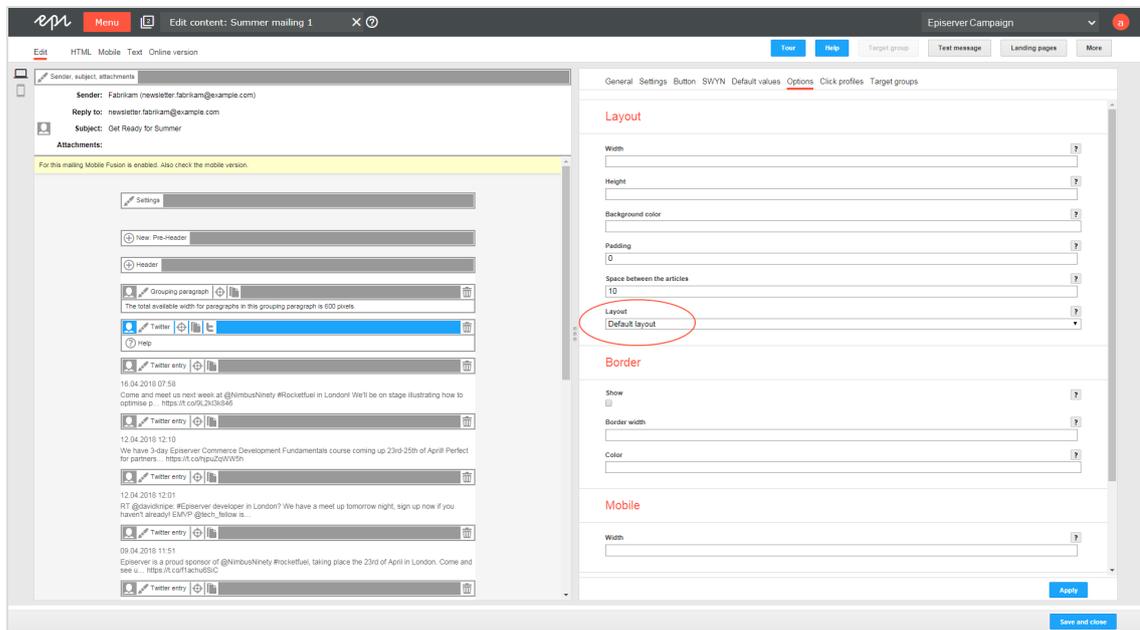
4. Click **Apply**.

Editing a layout

You can edit alternative layouts, but not the standard layout.

> **Warning:** If you lack knowledge of HTML, CSS, and Velocity, contact customer support to edit the alternative layouts. If you edit them without in-depth knowledge, serious display errors may occur in your mailings.

1. In the preview on the left, click **Settings**. The configuration window opens on the right.
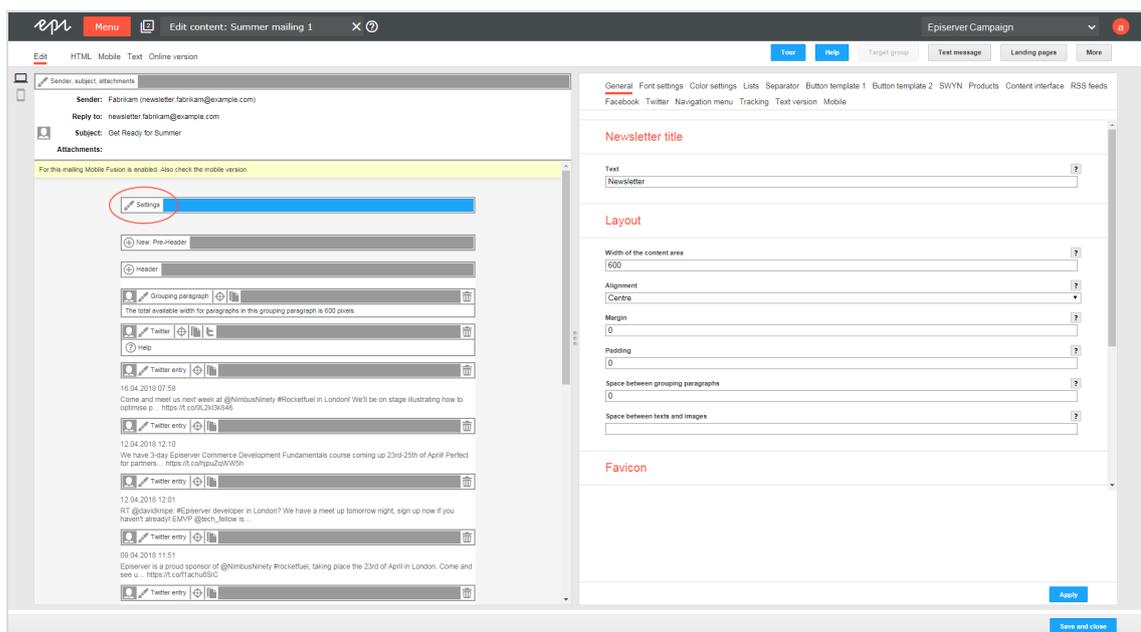
2. Open the **Twitter** tab. Each layout has source text fields for the desktop, mobile, and text versions.
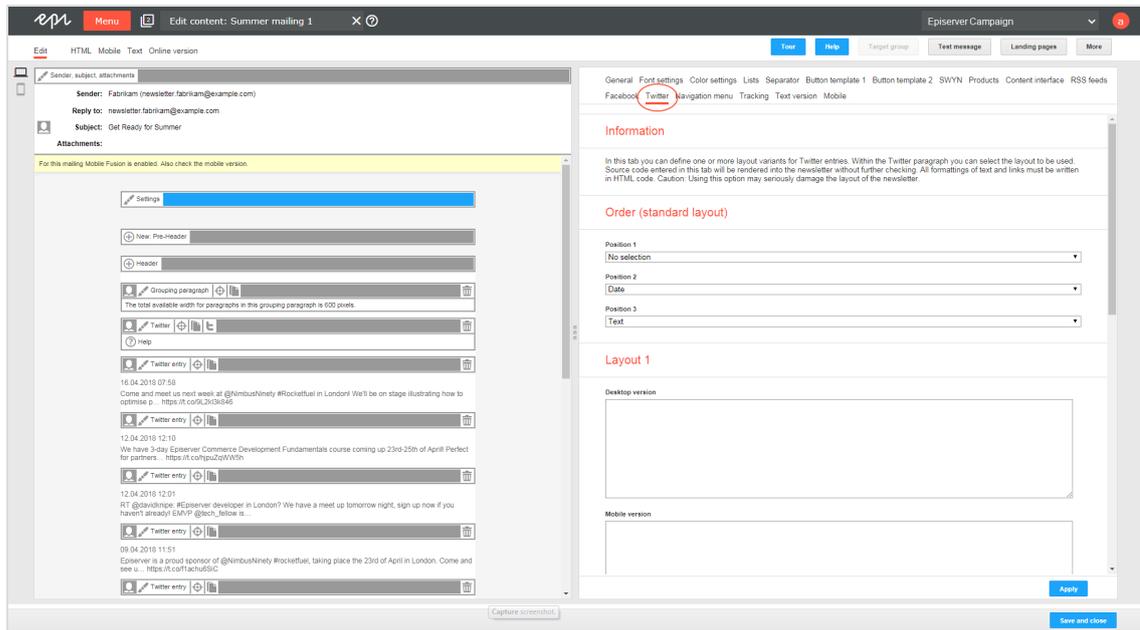
3. Edit the source text of the corresponding layout as needed. Under Inserting content, read how to place the various contents.
4. Click **Apply**.

Inserting content

Access the content of the Twitter paragraph using Velocity variables and format the transferred content using HTML style attributes.

The following Velocity variables are available:

- **Status**. Information on current item paragraphs
- **Present**. For using queries that check for the presence of an element
- **Value**. For issuing the content

Notes for the creation of new layouts

- **Font definitions**. If you are using an alternative layout variant, font definitions must exist in the HTML you entered. The texts are not formatted by the Template Kit to give you complete freedom in visual design.
- **Widths**. Specify a fixed width or a width in percent. You should enter a percentage, because this prevents elements from sticking out of the layout.
- **Danger of display errors**. Note that you must have a good knowledge of HTML, as the HTML code you enter is not validated by Episerver Campaign. If you enter incorrect HTML code, serious display errors may occur.

Status variables

Variable	Type	Description
$twitterItemFirst	Boolean	Is *true* if it is the first tweet in the Twitter paragraph, or is otherwise *false*.
$twitterItemIndex	Integer	Contains the position of the post within the Twitter paragraph as a number (1 for the first tweet, 2 for the second tweet and so on).
$twitterItemLast	Boolean	Is *true* if it is the last tweet in the Twitter paragraph, or is otherwise *false*.

Present variables

Variable	Type	Description
$twitterTextPresent	Boolean	Contains *true* if there is content for the **Text** box, or otherwise *false*.
$twitterAuthorPresent	Boolean	Contains *true* if there is content for the **Author** box, or otherwise *false*.
$twitterDatePresent	Boolean	Contains *true* if there is content for the **Date** box, or otherwise *false*.
$twitterLinkTextPresent	Boolean	Contains *true* if there is content for the **Text** box in the **Link** area, otherwise *false*.
$twitterLinkUrlPresent	Boolean	Contains *true* if there is content for the **URL** box in the **Link** area, otherwise *false*.
$twitterImageUrlPresent	boolean	Contains *true* if there is content for the **Image** box in the **Image** tab, otherwise *false*.
$twitterImageAltTextPresent	Boolean	Contains *true* if there is content for the **Alternative text** box in

Variable	Type	Description
		the **Image** tab, otherwise `false`.
$twitterImageLinkPresent	Boolean	Contains `true` if there is content for the **Link** box in the **Image** tab, otherwise `false`.

Value variables

Variable	Type	Description
$twitterTextValue	String	Contains the content of the **Text** box.
$twitterAuthorValue	String	Contains the content of the **Author** box.
$twitterDateValue	String	Contains the content of the **Date** box.
$twitterLinkTextValue	String	Contains the content of the **Text** box in the **Link** area.
$twitterLinkUrlValue	String	Contains the content of the **URL** box in the **Link** area.
$twitterImageUrlValue	String	Contains the image URL from the **Image** tab.
$twitterImageAltTextValue	String	Contains the content of the **Alternative text** box in the **Image** tab.
$twitterImageLinkValue	String	Contains the content of the **Link** box in the **Image** tab.
$editBar	String	Inserts the paragraph's button bar. This is required to integrate the button bar into the table, such as when implementing adjacent items. If this variable is not available, the button bar is placed above the item.

Navigation menu

> **Note:** Contact customer support to activate this feature.

Navigation menu example

With this paragraph type, you can create navigation bars with links to landing pages or deep links. And, you can add and edit menu items with no HTML knowledge.

Range of functions

- Can design each menu item individually: Text and background color, as an image or with an icon.
- Create up to 10 menu items.
- Store up to five user-defined layouts and apply them to the navigation menu.
- In the mobile version, you can display navigation in two or three columns or as a *hamburger menu*. The hamburger menu offers the following advantages:

  - simple/minimalistic; can be used almost anywhere in the layout
  - navigation can be folded in and out
  - space-saving display for small screens

Creating a navigation menu

1. While editing the content of a mailing in the Template Kit, click **New: Content paragraph**. A window for selecting the paragraph type opens on the right side.

   > **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.
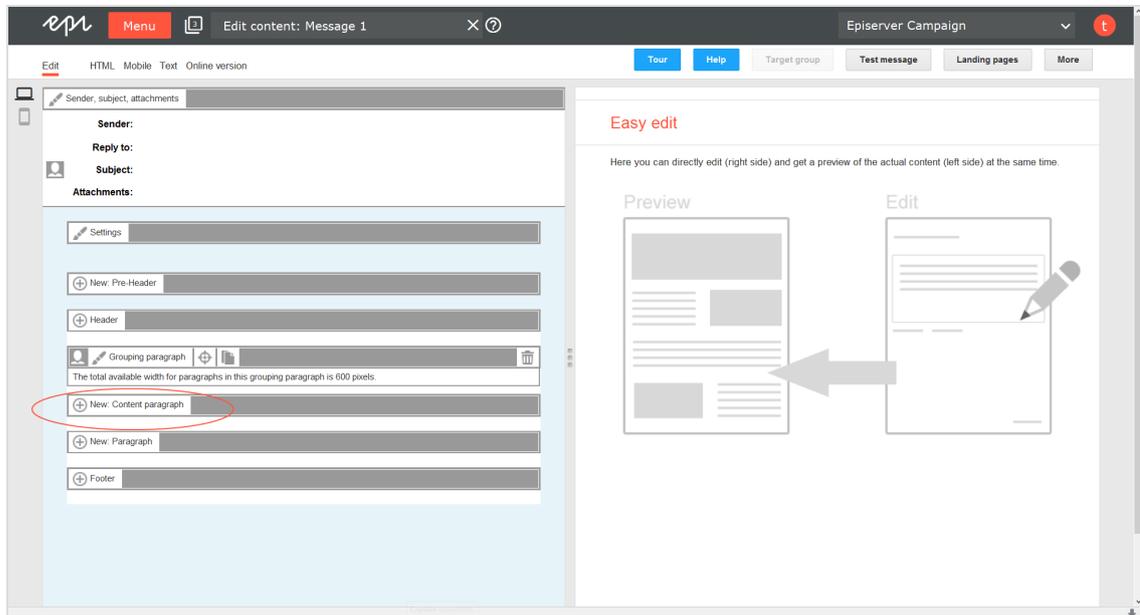
2. Click **Navigation menu**. The configuration window for the selected paragraph type opens.
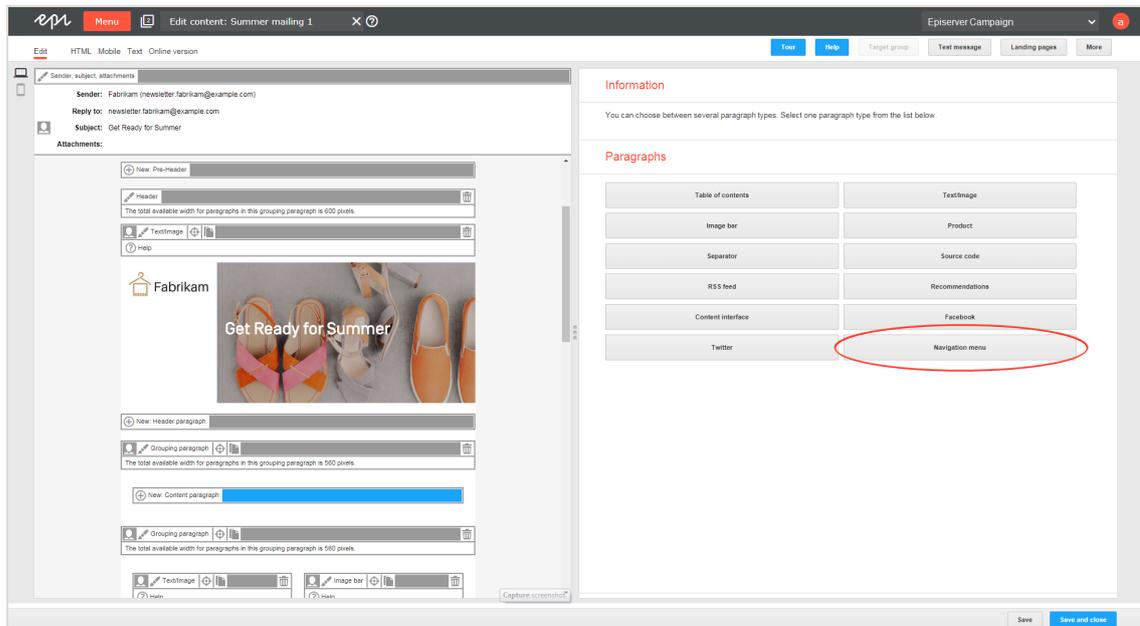
3. Click **Apply**. The newly created navigation menu appears on the left, in the preview window.
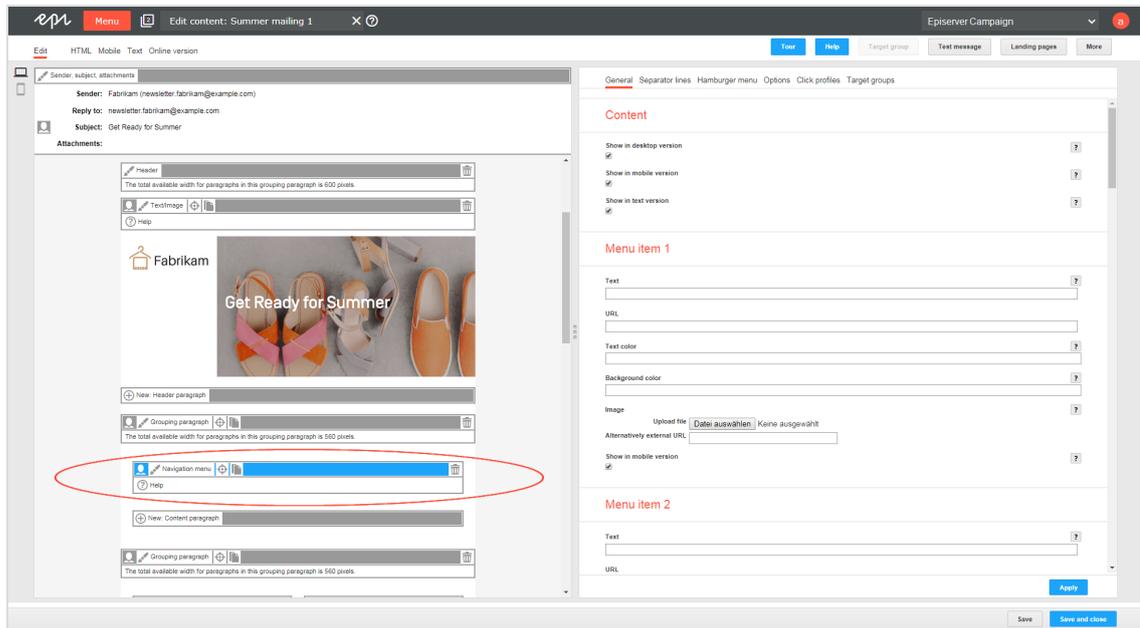
Configuring a navigation menu

1. Click **Navigation menu** on the left side of the preview in the menu bar of the navigation menu. The configuration window opens on the right.

2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.

   - General
   - Separator lines
   - Hamburger menu
   - Options
   - Click profiles
   - Target groups

General

Parameter	Description
Content	
Show in desktop version	Select to include this paragraph in the desktop mailing.
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in text version	Select to show the paragraph in the text version of the mailing.
Menu item 1-10	
Text	Enter the caption of the menu item. To use an image for the menu item instead of a caption,

Parameter	Description
	enter a caption anyway. In this case, the caption is used as the image's alternative text. **Tip:** You can display an image with or without a caption for the menu item. These settings are in the **Options** tab under **Menu items** > **Image position**.
URL	Enter a URL to which the menu item should refer. If a recipient clicks this menu item, he/she is directed to the specified URL.
Text color	Specify the text color for the menu item caption. If you leave the field blank, the text color specified in general settings > **Menu items in the navigation menu** > **Font settings** > **Color** is used.
Background color	Specify a background color for . The setting only affects the selected menu item. To use the same color for all menu items, configure a global background color. These settings are in the **Options** tab > **Menu items** > **Background color**.
Image	Upload an image. Click **Browse…** and select an image in the file browser. Alternatively, in the **Alternatively external URL** field, you can enter an image URL that refers to the image source. **Tip:** You can display the image together with or without the caption of the menu item. The corresponding settings are in the **Options** tab under **Menu items** > **Image position**. **Note:** The image size of the uploaded image is not reduced. So, only upload images that match the size of the menu item. If you select a multi-column layout for the mobile version, before sending, use mobile preview to check if the navigation menu displays correctly with these settings.
Show in mobile version	Select to show the menu item in the mobile version of the mailing.

Separator lines

Parameter	Description
Content	
Show vertical separator lines in the desktop version	Select to insert vertical separator lines between menu items in the desktop version.
Show vertical separator lines in the mobile version	Select to insert vertical separator lines between menu items in the mobile version.
Show horizontal separator lines in the mobile version	Check this box to show horizontal separator lines between menu items in the mobile version. This option only takes effect if you are using the default layout and configure it so that menu items in the mobile version are displayed below each other (see the **Options** tab under **Layout > Default layout**).
Layout	
Thickness	Enter the thickness of separator lines between menu items in pixels (integer value) .If you leave the field blank, the lines are displayed with a 1 pixel thickness. To show no separator lines, enter 0.
Color	Enter the color of the separator lines. If you leave the field blank, the color you specified in the general settings in the **Font settings** tab under **Menu items in the navigation menu > Color** is used.

Hamburger menu

To save space for display on smart phones and tablets, you can use a hamburger menu to reduce the navigation menu to an icon.Recipients can expand and collapse the navigation menu by clicking the icon.

> **Note:** The hamburger menu is only available for the mobile version. In addition,

Google's Gmail app does not support this feature and shows menu items expanded.

Parameter	Description
General	
Display	Select to activate the hamburger menu in the mobile version of your mailing.
Menu bar	
Heading	Enter the caption of the hamburger menu. The caption displays next to the hamburger menu icon.
Padding	Configure the size of the menu bar by specifying the area around the hamburger menu symbol. Enter the value in pixels (integer values).
Background color	Enter the background color for the hamburger menu's menu bar.
Image	
Image	Upload an image to replace the menu bar label with an image. Click **Browse…** and select an image in the file browser. Alternatively, in the **Alternatively external URL** box, enter an image URL that refers to the image source. If the uploaded image is too wide for the menu bar, the image is adjusted to the maximum available width.
Alternative text	Enter an alternative text that displays if a recipient blocks the download of images, or the image cannot be displayed for any other reason. The alternative text should contains a brief description of the picture.
Link	Enter the URL of a landing page, beginning with the `http://` or `https://` protocol. If you already created a landing page for the mailing, a list of those landing pages appears.

Parameter	Description
Icon	
Position	Select the position of the hamburger menu icon.
Color	Enter the color for the hamburger menu icon. If you leave the field blank, the color specified in the general settings in the **Font settings** tab under **Menu items in the navigation menu > Color** is used.
Background color	Enter the background color of the hamburger menu icon.
Rounding contours	Check this box to round the contours of the hamburger menu icon.

Options

Parameter	Description
Layout	
Width	Enter at least 30 pixel width. The setting only affects the desktop version. If you leave the field blank, the paragraph is displayed across the entire width available in the mailing. If you want to change the available width in the mailing, open the [general settings](#), open the **General** tab and make your changes in the **Layout** area.
Height	Enter the height of the paragraph in pixels. The setting only affects the desktop version. If you leave the field blank, the height will automatically be adjusted to fit the content of the paragraph. **Note:** If you select a height that is insufficient for the content of the paragraph, the value you enter is ignored, and the height is adjusted automatically.

Parameter	Description
Alignment	Specify how to position the navigation menu.
Background color	Enter the background color of the navigation menu.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Layout	Select a layout for your navigation menu. You can select between the supplied default layout and up to five custom user-defined layouts. To use a user-defined layout, set it up in advance in the general settings in the **Navigation menu** tab. If you choose to enter a user-defined layout from the drop-down list that you have not configured, the default layout is used instead. See Navigation menu layouts.
Default layout	Select the arrangement of menu items for the mobile version of the default layout. **Note:** If you use a custom layout, the option selected here is ignored.
Background image	
Image	To upload a background image that covers menu items, click **Browse…** and select an image in the file browser. In the **Alternatively external URL** box, you can also enter an image URL that refers to the image source. **Note:** If you specify a background image, it is used instead of the

Parameter	Description
	selected background colors for menu items. **Note:** Not all email programs and web mailers support background images. You should only upload background images that contain unimportant information.
Alignment	Specify how to position the background image.
Repeat	Specify whether and how the background image is repeated.
Menu items...	
Background color	Specify a global background color for the menu items. **Note:** If you specify an individual background color for a menu item, this is used instead of the global background color. To use the global background color for a menu item, delete the color value in the **General** tab under **Menu item #** > **Background color**.
Width (desktop version)	Enter the width of the menu items in pixels. **Tip:** The recommended width for the menu items is shown in the preview on the left if you hover over **?Help**.
Padding	Configure the size of the menu items by specifying the area around the caption. You can set each side of the area individually. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides of the area a uniform distance of 10 pixels away from the label • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels to the left

Parameter	Description
Text align-ment	Specify how to position the captions of the menu items.
Text pos-ition (next to the image)	Specify where to position captions of menu items next to an image. **Note:** This option applies in the following cases: • If an image is used in the menu item, and the caption is activated. • If the caption of a menu item wraps to several lines; the caption of the other menu items is positioned according to the option selected here. • You can set images for each menu item in the **General** tab under **Menu item #** > **Image**. • Activate the caption with the following **Image position** option.
Image pos-ition	Specify whether and where the images next to the captions of the menu items are displayed. **Tip:** If you select **Centered (no label)**, the stored caption is not displayed but is used for the image's alternative text.
Menu items (mobile version)	
Width	Enter the width of the menu items in percent. **Tip:** This option only takes effect if you use the default layout, and it is set so that individual menu items in the mobile version are displayed next to each another (see the **Options** tab under **Lay-out** > **Default layout**).
Text align-ment	Specify how to position the captions of the menu items.
Text pos-ition (next	Specify how to position the captions of the menu items next to the image.

Parameter	Description
to the image)	**Note:** This option applies in the following cases: • If an image is used in the menu item and the caption is activated • If the caption of a menu item wraps to several lines; the caption of the other menu items is positioned according to the option selected here • You can set images for each menu item in the **General** tab under **Menu item #** > **Image**. • Activate the caption in the **Options** tab under **Menu items (desktop version)** > **Image position**.
Border	
Show	Select to add a border to the paragraph. Do not forget to specify a color for the border when you activate the option.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile…	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.

Click profiles tab

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups tab

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups.

> **Note:** If more than one target group is selected for a paragraph, it is displayed if only one of them matches. Be aware also that paragraphs that do not occupy the whole width of the newsletter (for example, a sidebar) may cause unwanted gaps in the newsletter. Test the newsletter with target groups using the **Target groups** button in the top menu of this window and the **Send test email to target group** function.

Adjusting font settings

To change general font settings (for example, font, font color, font size and so on), adjust the options in the general settings in the **Navigation menu** tab under **Menu items in the navigation menu**.

Navigation menu layouts

This topic describes:

- how customer support sets up alternative HTML layouts
- how to select alternative layouts in the navigation menu
- how to edit alternative layouts using in-depth knowledge of HTML, CSS, and Velocity

To receive up to five alternative layouts, contact customer support to set up alternative layouts.

To create HTML layouts, set up alternative layouts for mobile and text versions also. If no alternative layouts are saved for those versions, the standard layout is used.

> **Note:** In some cases, some text elements will not be in the order that you want.

Selecting a layout

1. To select a standard layout or up to five alternative layouts, while editing a message in the Template Kit, on the left side of the preview, in the menu bar of the navigation menu, click **Navigation menu**. The configuration window opens.
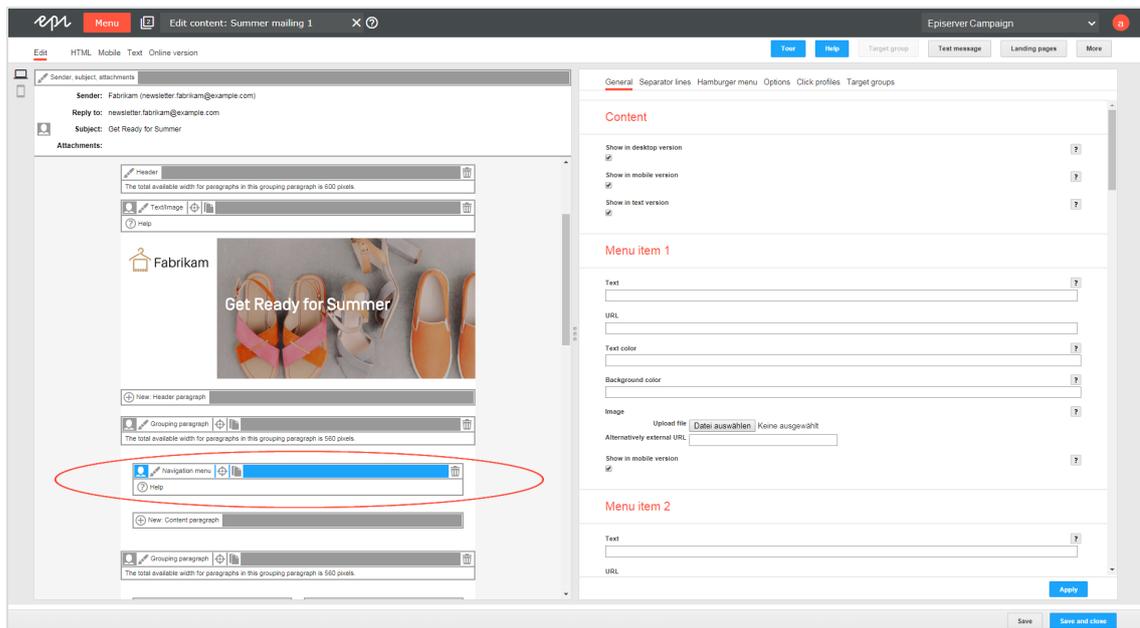
2. Open the **Options** tab.
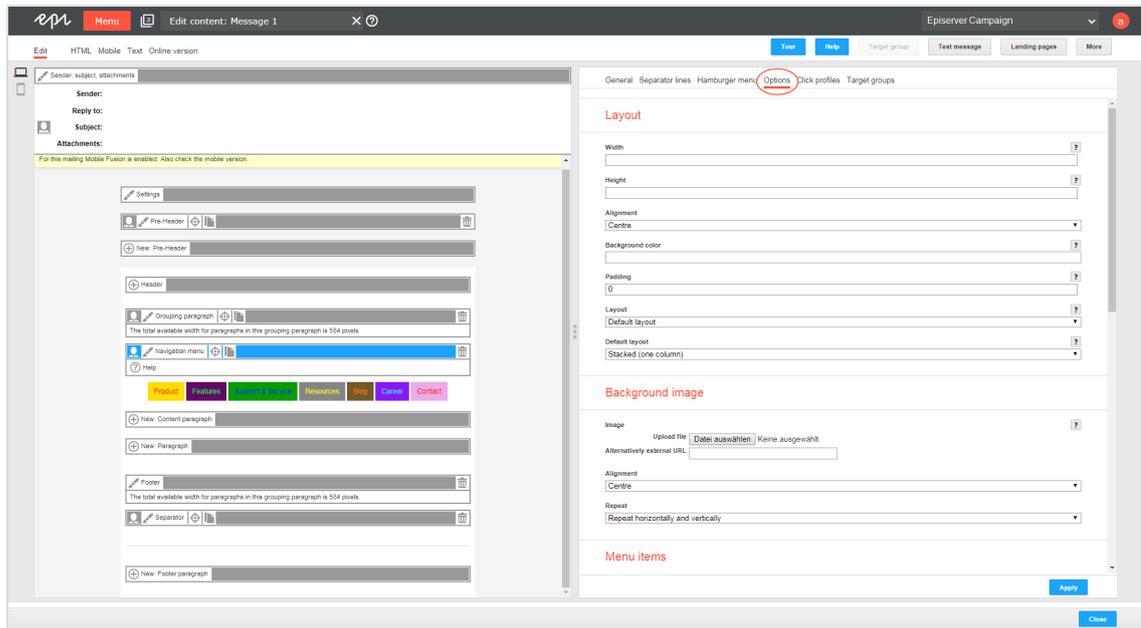
3. In the **Layout** area, in the **Layout** drop-down list, select the layout you want to use.
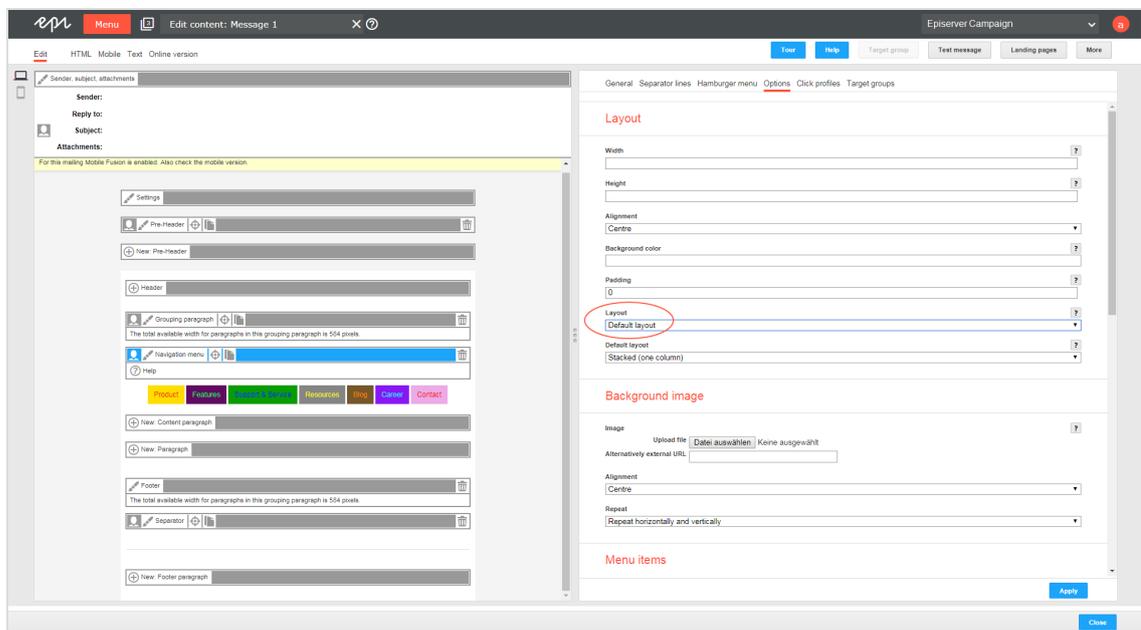
4. Click **Apply**.

Editing a layout

You can edit alternative layouts but not the standard layout.

> **Warning:** If you lack in-depth knowledge of HTML, CSS, and Velocity, contact cus-tomer support to change alternative layouts. If you edit the alternative layouts without in-depth knowledge, serious display errors may occur in your mailings.

1. In the preview on the left, click **Settings**. The configuration window opens on the right.
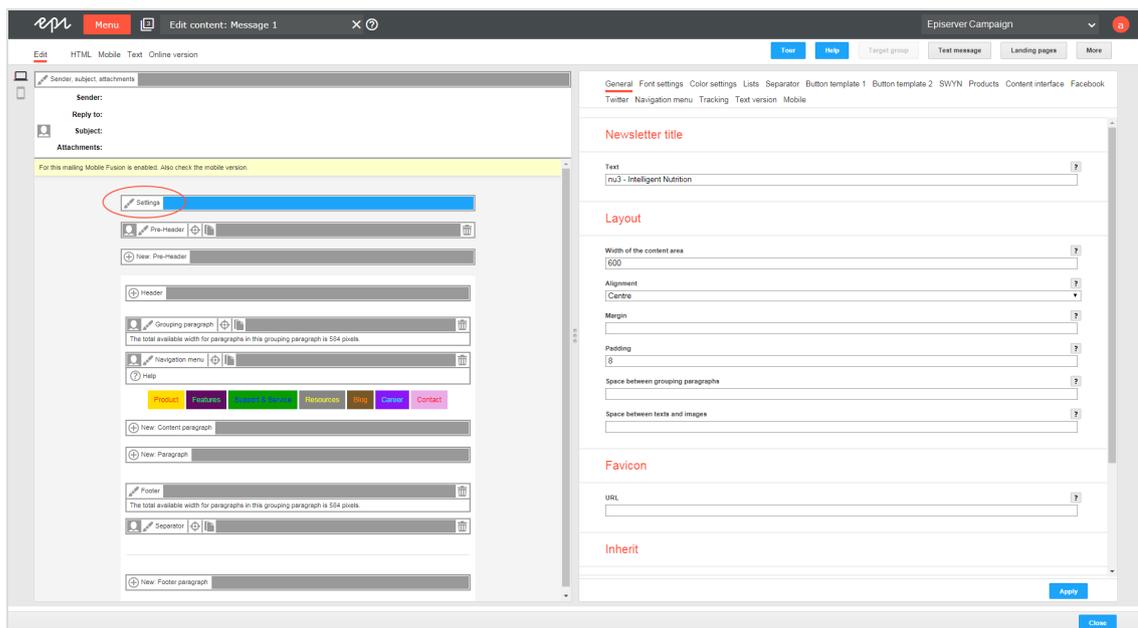
2. Open the **Navigation menu** tab. Each layout has source text fields for the desktop, mobile, and text ver-sions.
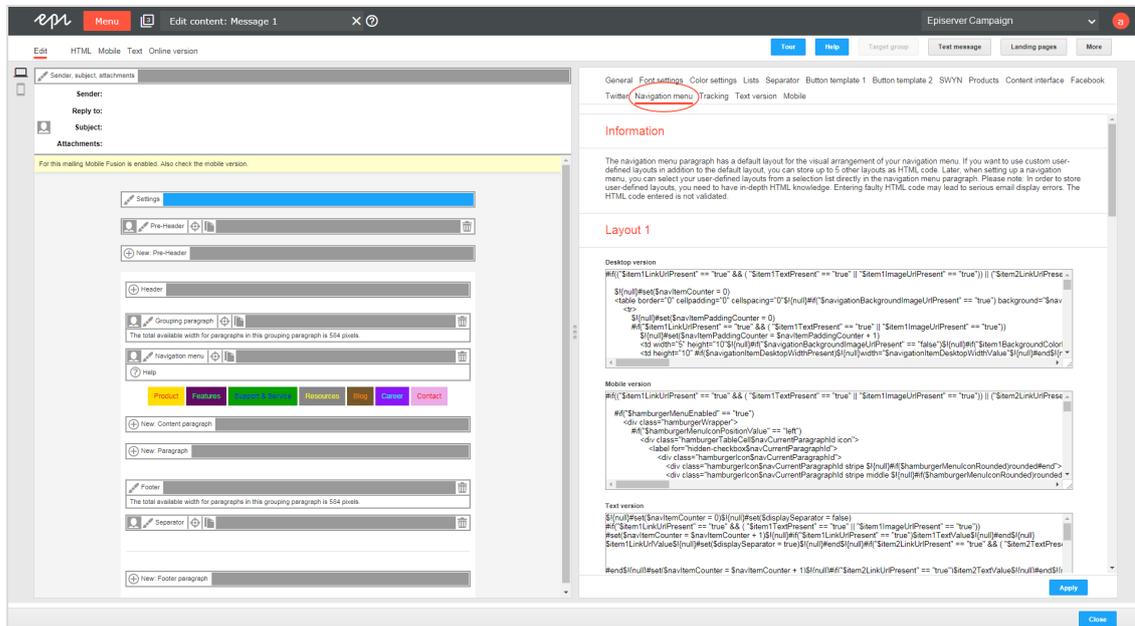
3. Edit the source text of the corresponding layout as needed. See **Insert content** to learn how to retrieve and place the various content items.

> **Note:** Set up alternative layouts for mobile and text versions also. If no altern-
> ative layouts are created for these versions, the standard layout is used.

4. Click **Apply**.

Inserting content

Access the content of the navigation menu using Velocity variables and format the transferred content using HTML style attributes.

The following Velocity variables are available:

- **Status**. Information on current item paragraphs
- **Present**. For using queries that check for the presence of an element
- **Value**. For issuing the content

Notes for the creation of new layouts

- **Font definitions**. If you are using an alternative layout variant, font definitions must exist in the HTML you entered. The texts are not formatted by the Template Kit to give you complete freedom in visual design.
- **Widths**. Specify a fixed width or a width in percent. You should enter a percentage, because this prevents elements from sticking out of the layout.

- **Danger of display errors**. Note that you must have a good knowledge of HTML, as the HTML code you enter is not validated by Episerver Campaign. If you enter incorrect HTML code, serious display errors may occur.

Status variables

Variable	Type	Description
$separatorDesktopEnabled	Boolean	Contains true if the **Show vertical separator lines in desktop version** check box in the **Content** section of the **Separator lines** tab is selected, otherwise false.
$separatorDisplayVerticalInMobileVersion	Boolean	Contains true if the **Show vertical separator lines in mobile version** check box in the **Content** section of the **Separator lines** tab is selected , otherwise false.
$separatorDisplayHorizontalInMobileVersion	Boolean	Contains true if the **Show horizontal separator lines in mobile version** check box in the **Content** section of the **Separator lines** tab is selected , otherwise false.
$hamburgerMenuEnabled	Boolean	Contains true if the **Show** check box in the **General** section of the **Hamburger menu** tab is selected, otherwise false.
$hamburgerMenuIconRounded	Boolean	Contains true if the **Rounding contours** check box in the **Icon** section of the **Hamburger menu** tab is selected, otherwise false.
$navigationItemsAmountValue	Integer	Contains the number of menu items that are displayed. Menu items are only displayed if a link and either the text or the image are specified.
$navCurrentParagraphId	Integer	Contains the ID of the respective navigation

Variable	Type	Description
		menu paragraph. This ID is particularly important for the mobile version, because the CSS classes use this ID as a suffix in the name.

Present Variables

Variable	Type	Description
$item1TextPresent – $item10TextPresent	Boolean	Contains true if there is content for the Text box in the Menu item # area, otherwise false.
$item1LinkUrlPresent – $item10LinkUrlPresent	Boolean	Contains true if there is content for the URL box in the Menu item # area, otherwise false.
$item1ImageUrlPresent – $item10ImageUrlPresent	Boolean	Contains true if there is content for the Image box in the Menu item # area, otherwise false.
$item1ColorPresent – $item10ColorPresent	Boolean	Contains true if there is content for the Text color box in the Menu item # area, otherwise false.
$item1BackgroundColorPresent – $item1BackgroundColorPresen	Boolean	Contains true if there is content for the Background color box in the Menu item # area, otherwise false.
$navigationLinkColorPresent	Boolean	Contains true if there is content for the Color box in the general settings under Font settings > Menu items in the navigation menu, otherwise false.

Variable	Type	Description
$separatorLayoutThicknessPresent	Boolean	Contains true if there is content for the **Thickness** box under **Separator lines** > **Layout**, otherwise false.
$separatorLayoutColorPresent	Boolean	Contains true if there is content for the **Color** box under **Separator lines** > **Layout**, otherwise false.
$hamburgerMenuMenuBarHeadlinePresent	Boolean	Contains true if there is content for the **Heading** box under **Hamburger menu** > **Menu bar**, otherwise false.
$hamburgerMenuMenuBarPaddingPresent	Boolean	Contains true if there is content for the **Padding** box under **Hamburger menu** > **Menu bar**, otherwise false.
$hamburgerMenuMenuBarBackgroundColorPresent	Boolean	Contains true if there is content for the **Background color** box under **Hamburger menu** > **Menu bar**, otherwise false.
$hamburgerMenuMenuBarImagePresent	Boolean	Contains true if there is content for the **Image** box under **Hamburger menu** > **Image**, otherwise false.
$hamburgerMenuMenuBarImageAltTextPresent	Boolean	Contains true if there is content for the **Alternative text** box under **Hamburger menu** > **Image**, otherwise false.
$hamburgerMenuMenuBarImageLinkPresent	Boolean	Contains true if there is content for the **Link** box under **Hamburger menu** > **Image**, otherwise false.

Variable	Type	Description
$hamburgerMenuIconColorPresent	Boolean	Contains true if there is content for the Color box under Hamburger menu > Icon, otherwise false.
$hamburgerMenuIconBackgroundColorPresent	Boolean	Contains true if there is content for the Background color box under Hamburger menu > Icon, otherwise false.
$navigationBackgroundImageUrlPresent	Boolean	Contains true if there is content for the URL box under Options > Background image, otherwise false.
$navigationItemDesktopBackgroundColorPresent	Boolean	Contains true if there is content for the Background color box under Options > Menu items, otherwise false.
$navigationItemDesktopWidthPresent	Boolean	Contains true if there is content for the Background color box under Options > Menu items, otherwise false.
$navigationItemDesktopPaddingPresent	Boolean	Contains true if there is content for the Padding box under Options > Menu items, otherwise false.
$navigationItemMobileWidthPresent	Boolean	Contains true if there is content for the Width box under Options > Menu items (mobile version), otherwise false.
$item1DisplayInMobileVersion – $item10DisplayInMobileVersion	Boolean	Contains true if the Show in mobile version check box under General > Menu item # is selected, otherwise false.

Value-Variables

Variable	Type	Environment	Description
$item1TextValue – $item10TextValue	String	Desktop, Mobile, Text	Contains the unformatted content of the **Text** box from the **Menu item #** area.
$item1TextFormattedValue – $item10TextFormattedValue	String	Desktop, Mobile	Contains the formatted content of the **Text** box from the **Menu item #** area. The text is formatted using the font settings from the general settings and the text color from the menu item itself.
$item1LinkUrlValue – $item10LinkUrlValue	String	Desktop, Mobile, Text	Contains the unformatted content of the **URL** box from the **Menu item #** area.
$item1LinkFormattedValue – $item10LinkFormattedValue	String	Desktop, Mobile	Contains the formatted content of the **URL** box from the **Menu item #** area. The text is formatted using the font settings from the general settings and the text color from the menu item itself. **Note:** If you have

Variable	Type	Environment	Description
			uploaded an image for the menu item and positioned it to the right or left of the text, the link is displayed including text and image.
$item1ImageUrlValue – $item10ImageUrlValue	String	Desktop, Mobile, Text	Contains the content of the **Image** box from the **Menu item #** area.
$item1ColorValue – $item10ColorValue	String	Desktop, Mobile	Contains the content of the **Text color** box from the **Menu item #** area.
$item1BackgroundColorValue – $item10BackgroundColorValue	String	Desktop, Mobile	Contains the content of the **Background color** box from the **Menu item #** area.
$navigationLinkColorValue	String	Desktop, Mobile	Contains the content of the **Color** box from the general settings > **Font settings** tab > **Menu Items in the Navigation Menu** area.
$separatorLayoutThicknessValue	String	Desktop, Mobile	Contains the content of the **Thickness** box from the **Separator lines** tab > **Layout** area.
$separatorLayoutColorValue	String	Desktop, Mobile	Contains the content of the **Color** box from the **Separator lines** tab >

Variable	Type	Environment	Description
			Layout area.
$hamburgerMenuMenuBarHeadlineValue	String	Mobile	Contains the unformatted content of the **Heading** box from the **Hamburger menu** tab > **Menu bar** area.
$hamburgerMenuMenuBarHeadlineFormattedValue	String	Mobile	Contains the formatted content of the **Heading** box from the **Hamburger menu** tab > **Menu bar** area.
$hamburgerMenuMenuBarPaddingValue	String	Mobile	Contains the content of the **Padding** box from the **Hamburger menu** tab > **Menu bar** area.
$hamburgerMenuMenuBarBackgroundColorValue	String	Mobile	Contains the content of the **Background color** box from the **Hamburger menu** tab > **Menu bar** area.
$hamburgerMenuIconPositionValue	String	Mobile	Contains the content of the **Position** box from the **Hamburger menu** tab > **Icon** area.
$hamburgerMenuIconColorValue	String	Mobile	Contains the content of the **Color** box from the **Hamburger menu** tab > **Icon** area.

Variable	Type	Environment	Description
$hamburgerMenuIconBackgroundColorValue	String	Mobile	Contains the content of the **Background color** box from the **Hamburger menu** tab > **Icon** area.
$hamburgerMenuMenuBarImageUrlValue	String	Mobile	Contains the content of the **Image** box from the **Hamburger menu** tab > **Image** area.
$hamburgerMenuMenuBarImageAltTextValue	String	Mobile	Contains the content of the **Alternative text** box from the **Hamburger menu** tab > **Image** area.
$hamburgerMenuMenuBarImageLinkValue	String	Mobile	Contains the content of the **Link** box from the **Hamburger menu** tab > **Image** area.
$navigationAlignmentValue	String	Desktop, Mobile	Contains the content of the **Alignment** box from the **Options** tab > **Layout** area.
$navigationBackgroundImageUrlValue	String	Desktop, Mobile	Contains the content of the **Image** box from the **Options** tab > **Background image** area.
$navigationBackgroundImageAlignmentValue	String	Desktop, Mobile	Contains the content of the **Alignment** box

Variable	Type	Environment	Description
			from the **Options** tab > **Background image** area.
$navigationBackgroundImageRepeatValue	String	Desktop, Mobile	Contains the content of the **Repeat** box from the **Options** tab > **Background image** area.
$navigationItemDesktopBackgroundColorValue	String	Desktop, Mobile	Contains the content of the **Background color** box from the **Options** tab > **Menu items** area.
$navigationItemDesktopWidthValue	String	Desktop, Mobile	Contains the content of the **Width (desktop version)** box from the **Options** tab > **Menu items** area.
$navigationItemDesktopPaddingValue	String	Desktop, Mobile	Contains the content of the **Padding** box from the **Options** tab > **Menu items** area.
$navigationItemDesktopAlignmentValue	String	Desktop, Mobile	Contains the content of the **Text alignment** box from the **Options** tab > **Menu items** area.
$navigationItemDesktopVerticalAlignmentValue	String	Desktop, Mobile	Contains the content of the **Text position (next to the image)** box from the **Options** tab >

Variable	Type	Environment	Description
			Menu items area.
$navigationItemImageBehaviorValue	String	Desktop, Mobile	Contains the content of the **Image position** box from the **Options** tab > **Menu items** area.
$navigationItemMobileWidthValue	String	Mobile	Contains the content of the **Width** box from the **Options** tab > **Menu items (mobile version)** area.
$navigationItemMobileAlignmentValue	String	Mobile	Contains the content of the **Text alignment** box from the **Options** tab > **Menu items (mobile version)** area.
$navigationItemMobileVerticalAlignmentValue	String	Mobile	Contains the content of the **Text position (next to the image)** box from the **Options** tab > **Menu items (mobile version)** area.

Field functions

Dynamic Rendering (ODR) and Velocity let you create your own field functions for your mailings. Dynamic Rendering is an XML-based script language for field functions; Velocity is a Java-based language. You should have some knowledge of HTML/XML or Java because this documentation provides only the basics of using Dynamic Rendering or Velocity.

Note: Dynamic Rendering and Velocity classes and operations

The special feature, **Edit field functions**, provides a wide range of personalization options for your mailings. However, only classes, operations, and parameters documented in this manual are permitted for the creation of field functions. Velocity or Dynamic Rendering code not documented here may interfere with or damage your mailing templates and affect the sending of mailings.

Read this documentation *thoroughly*.

Always test user-defined field functions with the personalized preview. If you have any questions or doubts about the code and its correct utilization, ask customer sup-port.

Adding a field function to a mailing
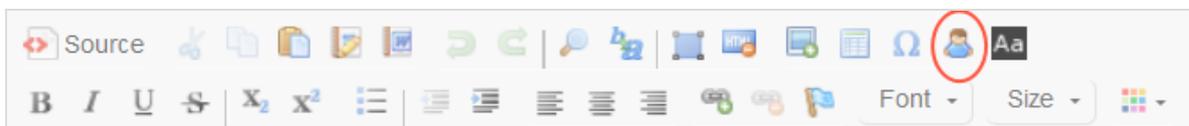
In the context of a mailing (paragraph, subject, and so on), you insert field functions using a placeholder in curly brackets **{ }**. To add a field function to a paragraph, follow these steps when editing a mailing.

1. In the editor toolbar, click **Insert field function** .
2. In the dialog box, select the desired field.
3. Click **OK**.

Tip: If you know the name of a field function, insert the name between curly brackets wherever you want it to appear in a mailing. When the mailing is sent, the field function placeholder is replaced by the content for which the field function stands.

Field function use cases

Field functions replace or personalize content. The field function definition generates a string (some text) and inserts it in the mailing. Some field functions are a simple replacement, for example they set the name or a date. Others can distinguish among different cases and replace the content accordingly. Also, field functions can be defined through target groups. These only generate text if the recipient matches the target group. The following list gives examples of field functions:

- **Date**. The current date is inserted.
- **Salutation**. A salutation usually contains one for males, another for females, and neutral term for recipients whose name and gender are unknown.
- **Subject line**. For example, the name or other personalization strings.

> Tip: Personalized links
>
> You can use field functions to create personalized links in your mailings. You also can use field function placeholders in the domain part or path of a URL and in URL parameters. The link tracking of personalized links works as in regular links.

Editing field functions

To edit a field function, select **Administration** > **Field functions**. The overview shows editable field functions. If you are working in a sub-client, the list also shows field functions inherited from the main client but these cannot be edited. Select a field function from the list and click **Edit**.

To create a new field function, click **Add**. If you delete a field function, make sure it is not used in an active mailing.

- **Inheritable**. Select if you want to make the field function available in sub-clients. Users logged into a sub-client can use inherited functions, but not edit them.
- **Type**. Select which rules are applied for validation and execution of a field function:

  > Note: Do not change the type if you are not sure of what you are doing.

  - **JSPX**. This type accepts only valid XML code.
  - **Velocity**. This type accepts only Velocity code.

- **Example**. Shows a replacement example. Enter an actual example or a description of the field function that explains the field function.
- **Content**. Enter the field function definition using either Dynamic Rendering or Velocity for each mailing type, media type or content type. This may be static text, dynamic text or both. To create dynamic content, enter commands and queries that are executed when the mailing is sent.

  - **Default replacement**. Contains a fallback that is applied if a field function is not defined. Also, if you do not want to specify different field functions for each email type, media type, and element type, use this field and leave the others empty.
  - **Text**. Write the code and text for the field function used in the text version of a mailing.
  - **HTML**. Write the code and text of a field function used in the HTML version of a mailing.

○ **SMS**. Write the code and text of a field function used in SMS mailings.

○ **Subject**. Write the code and text of a field function used in the subject line of a mailing.

Template engines

Template engines are software tools to process a field function. That is, they read the commands in a field function, query the database, and create an output string. Episerver Campaign provides two template engines: the proprietary Dynamic Rendering engine, and the Velocity engine. The following paragraph introduces these two and lists available classes and functions.

ODR – Dynamic Rendering

If your are familiar with XML and HTML tags, you can learn how to write field functions in the Dynamic Rendering language. The following example shows a salutation logic written in Dynamic Rendering.

Sample code

```
<odr:choose>
      <odr:when test="%{not empty user.data.firstname and not empty user.data.lastname and user-
.data.salutation == 'Mrs.'}">
              <odr:out value="Dear Mrs. %{user.data.firstname} %{user.data.lastname}," />
      </odr:when>
      <odr:when test="%{not empty user.data.firstname and not empty user.data.lastname and user-
.data.salutation == 'Mr.'}">
              <odr:out value="Dear Mr. %{user.data.firstname} %{user.data.lastname}," />
      </odr:when>
      <odr:otherwise>
              <odr:out value="Dear Sir or Madam," />
      </odr:otherwise>
</odr:choose>
```

> **Tip: Remarks**
>
> - **Line 1**. The **choose** tag initiates a query of several parameters. It contains no attributes.
> - **Lines 2 and 7**. The **when** tag initiates the query of a single parameter. Attributes are the parameter itself and the values. In the example, the tag checks whether the fields first and last name in the recipient list are not empty and whether the field **Salutation** contains *Mrs.* or *Mr.*.
> - **Lines 4 and 8**. The **out** tag contains the output string. This is static or dynamic text or both, like in the example.
> - **Line 12**. The **otherwise** tag defines the output string for cases that do not match a previous tag. It contains no attributes

Line breaks, blank spaces and formatting with Dynamic Rendering

Line breaks and blank spaces between Dynamic Rendering tags are escaped during the rendering. You can insert blank spaces in the running text inside the quotation marks. HTML tags inside the Dynamic Rendering expressions (i.e., inside the quotation marks) must be written as entities. Use the following entities to escape the respective characters:

- <. (< less than)
- > (> greater than)
- " (" quotation mark)
- & (& ampersand)

For information about the logic and rules of XML, see http://en.wikipedia.org/wiki/Xml.

Velocity

Velocity is a Java-based template engine. Velocity algorithms can appear within HTML in a mailing or a website. An algorithm may contain conditions and fallbacks, which generate some text if true and another text or no text if false.

Velocity references are initiated with a **$** sign, followed by a class and a function. Two examples are below.

Example: Insert first and last name of a recipient in a salutation

```
Dear ${user.data.firstname} ${user.data.lastname}!
```

You also can use the expression `${user.data.[field_name]}` to address any field in the recipient list by replacing `[field_name]` with the field name.

If your recipient list contains recipients whose first name is unknown, because it is usually not a mandatory field, the expression shown above needs to be extended. Otherwise, it could produce a salutation like "Dear Smith!". With Velocity, you can define an alternative expression, using "Dear Mrs." or "Dear Mr." plus the recipient's last name.

Example: Salutation with complete name and fallback

To consider possible cases, write an if-then algorithm. This algorithm is initiated with a pound sign (**#**) and the command **if**. Below, the different cases and an alternative (else) are formulated. The algorithm ends with `#end`:

```
#if("$!{user.data.lastname}" != "" &&"$!{user.data.gender}" != "")Dear
#if($user.data.gender.startsWith("male"))Mr.
#if($user.data.gender.startsWith("female"))Mrs.#end $user.data.lastname
#else$!{null}Dear Sir or Madam#end$!{null}
```

> Tip: Remarks
>
> - **Line 1**. To formulate the salutation, the recipient's last name and gender must be known. In this line, the field function checks whether both exist for a given recipient. (If lastname is not null AND gender is not null...)
>
>   If you formulate an `#if` operation, use the special operator `$!`. Otherwise, if the variable is not defined, Velocity would read the variable's name as a string (and not its value, because there is none) and, when an expression "does equal" is formulated, the result would be `false`, because the string is unequal to a non existing value. The special operator `$!` suppresses this expression if the variable it is not defined.
>
>   The whole expression is wrapped in quotation marks. If a field is not defined for a recipient, a query would deliver the result NULL. The quotation marks transform this into an empty string, which can be validated with conditions of the type = `""` (is empty) or `!=""` (is not empty).
>
> - **Line 2**. If the gender is male, the correct form "Mr." is chosen.
> - **Line 3**. If the gender is female, the form "Mrs." is chosen, followed by the recipient's last name.
> - **Line 4**. The placeholder `#else` creates a fallback, which is used if the first condition does not match, i.e. if either the last name or the gender are not known. In this case, a neutral, general salutation is displayed.
>
>   If Velocity commands are inserted directly into continuous text, space characters after such commands are ignored. This may cause text that follows a Velocity command to be interpreted together with the command. The result is a syntax error. To avoid such errors, a NULL object must be inserted between the Velocity command and the text: `$!{null}`. This object does not generate any output but closes the preceding command.
>
>   Close Velocity-Code with the Tag `#end`. After this tag, insert a line break.

Velocity classes and functions

Episerver Campaign provides several classes and functions that you can use to define field functions.

- [$user.data](#)
- [$bmFormat](#)
- [$bmMimeType](#)
- [$filter](#)

$user.data

Query fields of a recipient list. Use this function either to insert the value of a field (such as a user's name) in a mailing (placeholder), or to check if the field matches a given value (if-then-function).

Function	Velocity code
Value equals a string value	`$user.data.[field_name] == "string"`
Value equals a numeric value	`$user.data.[field_name] == X`
Value does not equal a string value	`$user.data.[field_name] != "string"`
Value starts with a string value	`$user.data.[field_name].startsWith ("string")`
Value does not equal a numeric value	`$user.data.[field_name] != X`
Value is less than or equals a numeric value	`$user.data.[field_name] <= X`
Value is greater than or equals a numeric value	`$user.data.[field_name] >= X`
Value is greater than a numeric value	`$user.data.[field_name] > X`
Special function: IsOnlineVersion	`$user.data.bmIsOnlineVersion`

Use **IsOnlineVersion** to check whether the online version of a newsletter is currently displayed. The return value is true. To hide the link to the online version, if it is already displayed, specify the following Velocity code:

```
#if($user.data.bmIsOnlineVersion)cLICK <a href="{Online-Version-Link}"
target="_blank">here</a> to read an online version of this newsletter.
```

$bmFormat

Format a value within this expression. You can only format dates and numeric values, but you can add an optional pattern or the number of decimal places (precision). The following code show an example of using **$bmFormat**:

```
You registered with us on $bmFormat.formatDate($user.data.created)
```

Function	Velocity code
Format as percentage	`$bmFormat.-` `formatPercentage`
Format as currency. If the parameter **includeCurrencySymbol** is set to `true`, the currency symbol is displayed.	`$bmFormat.formatCurrency`
Format a date	`$bmFormat.formatDate`
Format a date and time	`$bmFormat.formatDateTime`
Format a time	`$bmFormat.formatTime`

Attributes for formatting numeric values

Attribute	Description
pattern	• **Numeric values**. Use the pattern **###,###,###.##** or **000000.000**. **Tip:** # stands for a digit, 0 for leading or trailing zeros. The dot indicates a decimal separator and can only appear once in the pattern. The comma is used is used as a grouping symbol and can appear any number of times, except after the decimal point where it may not appear. **Note:** The output that this creates has numeric values appear with German formatting; that is, the grouping symbol (comma in the pattern) is displayed as a dot and the decimal separator (dot in the pattern) is displayed as a comma—for example "1.000,00". English formatting (for example "1,000.00") is not supported. Examples for the value 1000:

Attribute	Description
	<table><tr><th>Pattern</th><th>Output</th></tr><tr><td>###,###,###.##</td><td>1.000</td></tr><tr><td>000,000,000.00</td><td>000.001.000,00</td></tr><tr><td>##,##.0###</td><td>10.00,0</td></tr><tr><td>###.###.###.##</td><td>✗ invalid, there are too many dots</td></tr><tr><td>###.###,##</td><td>✗ invalid, the comma appears after the dot</td></tr></table> **Date values**. Use the pattern `dd.MM.yyyy`. **Time values**. Use the pattern `hh:mm:ss`. For more information about formatting numbers and dates, see the [Java documentation](#) from Oracle.
precision	Integer value that specifies the number of decimal places to which the output value should be rounded.

$bmMimeType

Query the mime type of the mailing that is currently rendered.

Mime Type	Velocity code
Plain text emails	`$bmMimeType == "text/plain"`
HTML emails	`$bmMimeType == "text/html"`

$filter

Invoke a target group. The submitted string must match a target group ID of your Episerver Campaign client. To get the IDs of your target groups, ask customer support. Do not use an ID if you are not sure it matches a target group; otherwise, your template does not work properly. The Velocity code for this function is as follows:

```
$filter.filterByRevisionedFilter
```

Coupon system

> **Note:** Contact customer support to activate this feature.

The coupon system lets you:

- Include coupon codes in mailings that recipients may redeem in your online shop.
- Integrate blocks of coupon codes with a placeholder.
- Manually or automatically add coupon codes to a coupon block.
- Display coupon codes as machine-readable bar codes.

You can manage the coupon system via the Episerver Campaign user interface. You can also manage the coupon system remotely using the following Episerver Campaign programming interfaces:

- REST API
- SOAP API via web services CouponBlockWebservice and CouponCodeWebservice

Assigning coupon codes

During dispatch, static or dynamic coupon codes are assigned to the mailings and recipients (MailingToUser ID). This ensures that each coupon code of a coupon block is only sent once.

Tracking coupon codes sent in a mailing

In the Managing coupon blocks window, click **Download assignments** to download the assignment of sent coupon codes in a CSV file. The file contains the

- coupon block ID
- coupon code
- recipient ID (generally, the email address)

- recipient list ID
- mailing ID
- mailing's creation and modification dates

Inserting coupon codes in a mailing

To send coupon codes in a mailing, insert a placeholder where the code will be displayed. Find the placeholder in the **Details** area of the **Manage coupon blocks** window.

```
{Coupon Block:12345678901}
```

The coupon code is displayed as plain text in the email.

If you want to send several coupons in an email, use several coupon blocks. However, if you insert the same placeholder several times in a mailing, only one coupon code is sent.

> **Tip:** For special occasions, such as birthday mailings, you can insert a coupon code in an image using image personalization.

Testing emails

By default, coupon codes in test emails are disabled, and a special placeholder with no function replaces the active coupon code.

To enable real coupon codes for test cases, check the box **Use valid coupon codes in test emails** in the details of a coupon block or when creating coupon blocks.

Managing coupon blocks

Coupon codes are organized using containers known as *coupon blocks*. You manage coupon blocks on a client level, so you can use the same coupon block in multiple mailings in your client.

A mailing may only contain one coupon code from the same coupon block. If you insert two coupon codes from the same block, the mailing displays the same code twice but uses only one coupon code.

In contrast, if you want recipients to receive several different coupons in a mailing, include coupon codes from different coupon blocks. Also, a recipient can receive several coupon codes from the same coupon block if they are sent in separate mailings.

Editing coupon blocks

To manage and edit coupon blocks, open the start menu and select **Special** > **Manage coupon blocks**.

In the list, click a coupon code to display its details.

- **Name**. Used internally by the coupon code system.
- **Field function**. Use this placeholder to insert the coupon block in a mailing.
- **Type**. One of the following:

    ○ Static
    ○ Generated
    ○ EAN-13 bar code
    ○ Code 128 bar code
    ○ Interleaved 2 of 5 bar code

- **Created**. The creation date of the coupon block.
- **Last modified**. The modification date of the coupon block.
- **Total coupon codes**. Number of codes a coupon block contains (for static and bar code blocks) or how many codes were already generated (for generated blocks).
- **Free coupon codes**. Number of free codes in a coupon block. For generated coupon blocks, the value is infinite.
- **Use valid coupon codes in test emails**. Check this box to use valid coupon codes in your test emails.

Use these buttons to perform the following actions.

- Create
- Delete block
- Delete unused codes
- Import codes
- Download assignments
- Download codes
- Edit thresholds
- Edit bar code coupon block

Creating a coupon block

Prerequisite: If you want use static coupon blocks, you must first import them. See Importing codes.

1. Click **Create**.

2. In the **Name** box, enter a descriptive name for the coupon block, so you can identify it later.
3. In the **Type** area, select a coupon block type.

   - **Static**. Use if you want to release a limited number of coupon codes or generate coupon codes from your CMS. Static coupon blocks are imported into Episerver Campaign in a CSV file format. See Importing codes.
   - **Generated**. Coupon blocks are dynamically generated by Episerver Campaign during dispatch and are typically unlimited. These coupons are generated with one coupon block.
   - **EAN-13 bar code**. Bar code blocks convert a 13-digit code into a machine-readable bar code and insert it as a graphic into a mailing. The encoding of the bar code conforms to the EAN-13 specification. The coupon system ensures that bar codes are unique and only used once. No items are encoded, but a unique code is assigned to each recipient. To manually import coupon codes into a bar code block, see Importing codes.
   - **Code 128 bar code**. Bar code blocks convert an alphanumeric code of any length into a machine-readable bar code and insert it as a graphic into a mailing. The Code 128 bar code contains the full ASCII character set and automatically switches between the Code 128 bar code character sets A, B, and C to best encode your data.

     You can also select the Code 128 bar code character set manually:

     - **Character set A**. Supports the ASCII character set without lower case letters.
     - **Character set B**. Supports the ASCII character set without control codes.
     - **Character set C**. Supports pairs of digits from *00* to *99*.

To manually import coupon codes into a bar code block, see Importing codes.

- **Interleaved 2 of 5 bar code.** Bar code blocks convert a numeric code of any length into a machine-readable bar code and insert it as a graphic into a mailing. The Interleaved 2 of 5 bar code is a numeric bar code that only supports pairs of digits from *00* to *99*. To manually import coupon codes into a bar code block, see Importing codes.

4. To use valid coupon codes in your test emails, check the **Use valid coupon codes in test emails** box.
5. Click **Save**.

Deleting a coupon block

In the overview, click the coupon block you want to delete > **Delete block** > **Delete**. Coupons in the block that have been sent but not redeemed remain valid.

> **Note:** When deleting a coupon block, its histories and any assignments are lost.

Deleting unused codes

In the overview, click the coupon block you want to empty > **Delete unused codes**. Unused codes are deleted, but the block remains intact. Later, you can add new coupon codes to the block.

> **Note:** You can only delete unused codes in static and bar code coupon blocks.

Importing codes manually

Prerequisite: Your computer contains coupon codes in a CSV file. The file should only contain one column with the codes. You should know the CSV file's encoding, column delimiter, escape character, and if the CSV file contains a header row.

To learn how to define the minimum number of codes for that block, see Editing thresholds.

> **Note:** Codes for EAN-13 bar code coupon blocks must consist of a 13-digit number, digits only. Codes for Interleaved 2 of 5 bar code coupon blocks can consist of any number of digits, but the number must be even.

1. In the overview, click the coupon block to which you want to import codes.
2. Click **Import codes**. The **Upload coupon codes** window opens.
3. Click **Browse…** and select the CSV file that contains coupon codes to be imported.
4. Click **Preview**.

5. In the **File charset** drop-down list, select the encoding used in the CSV file. If you are not sure about this, select **Auto**.

6. In the **Column delimiter** drop-down list, select the character (semicolon, comma, tabulator, and so on) that separates the data fields in the uploaded file.

7. In the **Escape character** drop-down list, select the character with which each individual data field is enclosed. Some database programs use a single quote (') or double quote (") around each data field when exporting.

8. If the CSV file contains a header, in the **Skip first row** drop-down list, select **Yes**.

9. Optionally, in the **Maximum number of rows to preview** drop-down list, select the number of records to display in the preview.

10. Click **Refresh preview** to reload the records.

11. Click **Import coupon codes**. The last tab shows how many codes were imported.

After the import, the coupon block is ready for use.

Importing codes automatically

Automatic imports are performed after a cron job is configured to regularly check if new coupon blocks are available and to upload the CSV file from an SCP server. If you want to use this option, contact customer support.

Downloading assignments

To download a CSV file containing the already used coupon codes and their corresponding mailing and recipient assignments:

1. In the overview, click the desired coupon block.
2. Click **Download assignments**.

Downloading codes

To download codes of a coupon block:

1. In the overview, click the desired coupon block.
2. Click **Download codes**.

> **Note:** Due to their inherent unlimited nature, you can only download the list of used coupons as a CSV file for dynamic and bar code coupon blocks.

Editing thresholds

If you are using static or bar code coupon blocks, you must ensure that sufficient coupon codes are available. Depending on the type of mailing, Episerver Campaign uses several security questions.

To define the threshold values, perform the following steps :

1. In the overview of the **Manage coupon blocks** window, click the coupon block whose thresholds you want to edit.
2. Click **Edit thresholds**.
3. Define the threshold values in the **Configuration** area.

   - **Warning threshold value 1**. Enter an integer warning threshold value for transactional mailings. If this threshold is reached, a notification email is sent, but the sending continues. You should then upload new coupon codes.
   - **Termination threshold value 1**. Enter an integer threshold value for transactional mailings. If this threshold is reached, a notification email is sent and dummy coupon codes with no function are used in the mailing. You must upload new coupon codes.
   - **Warning threshold value 2**. Enter the percentage of recipients of regular and Smart Campaign mailings for which the coupon block must still contain coupon codes after sending. If this threshold is reached, a notification email is sent, but the sending continues. You should upload new coupon codes.
   - **Termination threshold value 2**. Enter the percentage of recipients of regular and Smart Campaign mailings for which the coupon block must still contain coupon codes after sending. If this threshold is reached, the sending is canceled. You must upload new coupon codes before restarting the mailing.
   - **Email addresses**. Enter one or more email addresses to which a notification is sent if a threshold value is reached.
4. Click **Save**.

   > Note: Threshold usage
   >
   > For triggered mailings (for example, birthday mailings), the coupon system uses the thresholds for regular mailings. For transactional mailings sent using the REST API, HTTP API or [Marketing Automation](#), the coupon system uses the thresholds for special mailings.

Editing a bar code coupon block

1. In the overview, click the coupon block you want to edit.
2. Click **Edit bar code block**.
3. You can specify the size options of the bar code coupon block either through height and width or line thickness :

- Select **Height and width** and enter the desired values in pixels.
- Select **Line thickness** and then in the **Line thickness** drop-down list, select a value from 1 to 10 pixels.

Countdown timers

> **Note:** Contact customer support to activate this feature.

If the countdown timer is enabled for your user account, to access the feature, open start menu > **Special** > **Countdown timers**.

Count down the time until your offer runs out with the countdown timer. Grab your recipients' attention and increase conversion rates.

The countdown timer displays the number of days, minutes, hours and seconds currently remaining on an offer, regardless of when a recipient opens your newsletter. The countdown timer is dynamic, agile and flexible. You can customize the timer and the graphic layout.

The following topics show how to graphically design offers with a countdown timers and incorporate them into your messages. If you encounter problems, see Troubleshooting countdown timers.

HOLIDAY DISCOUNT
20% OFF

OFFER ENDS IN:

12:06:27:09
DAYS   HOURS   MINUTES   SECONDS

How it works

Episerver Campaign support two types of countdown timers:

- Non-animated countdown timer with static display of time remaining.

  If you integrate a non-animated countdown timer into your mailing, when the recipient opens the mailing, a static image with the currently remaining time is generated, loaded into your mailing, and displayed.

- Animated countdown timer with live countdown.

  If you incorporate an animated countdown timer into your mailing, the counter is active in your top offer for 60 seconds. Animated countdown timers use the GIF (Graphics Interchange Format) image format. This way, the newsletters contains a ticking clock.

> **Note:** If a countdown timer uses a complex graphic design for its background, your animation may be several megabytes, which is too much for a newsletter and your recipients' inbox. So, the countdown timer file size is limited to 1.5 megabytes.

You can create consistent and attractive layouts while keeping the file size small by splitting a product offer into two parts that you bring back together. Save the product image and/or your key visual as a normal image file (JPEG or PNG) and save the counter as a GIF animation in Episerver Campaign.
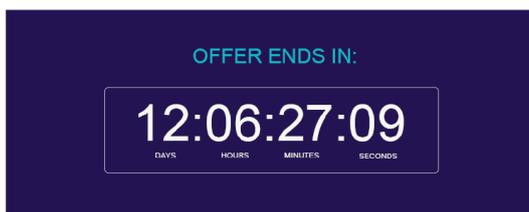
Preparing graphics explains how to split a product offer with a countdown timer into two parts then bring them together into a single graphic in your message.

Preparing graphics

> **Tip:** If you want to insert the timer into a message without a graphic or photo, see Creating a countdown timer.

Requirements

To prepare a countdown timer with a background graphic or photo, you need:

- image editing software, such as Adobe Photoshop
- a product image or key visual

Example of preparing graphics

To create a countdown timer with a background graphic or photo, prepare two parts (see **How it works**):

- the product image or key visual
- the graphic on which the timer will be placed

To prepare both parts, follow these steps.

1. Open your product image or key visual with an image editing program.
2. Set the width of the product image or key visual between 100 and 800 pixels. In the example, the image width is 776 pixels.

> **Warning:** If your message template or paragraph is limited to a smaller width, do not exceed it. The countdown timer is not scaled to the maximum value of your message template or paragraph.
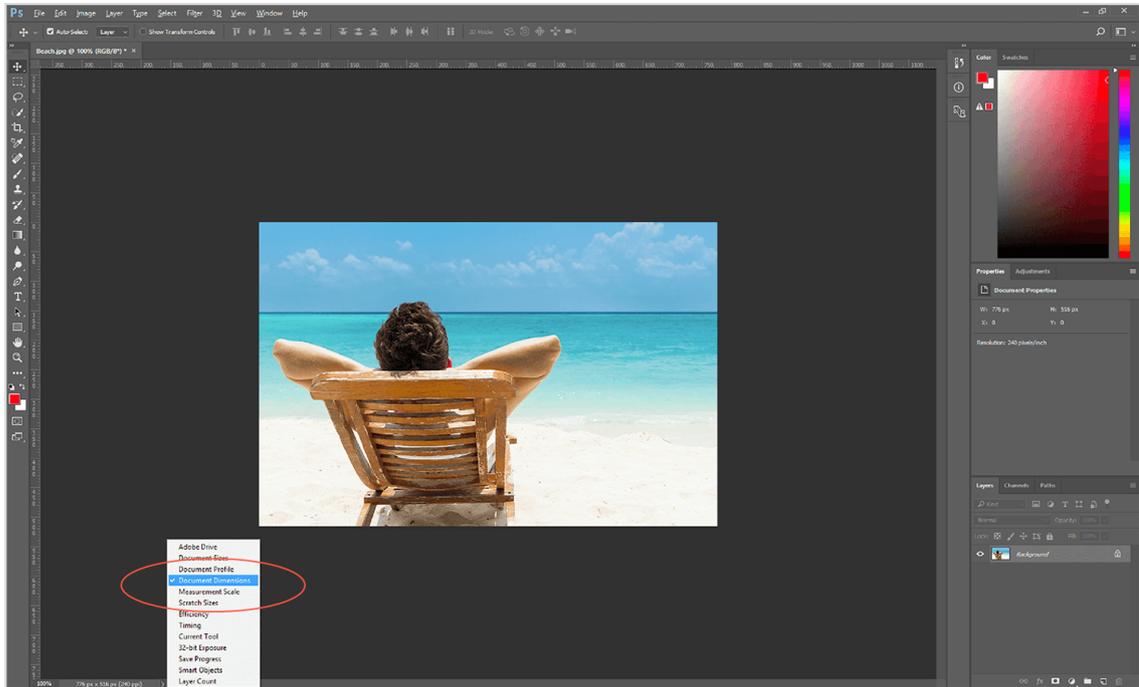
3. Optional: Insert additional graphic elements into your image. A blue banner and a headline are inserted in the example.
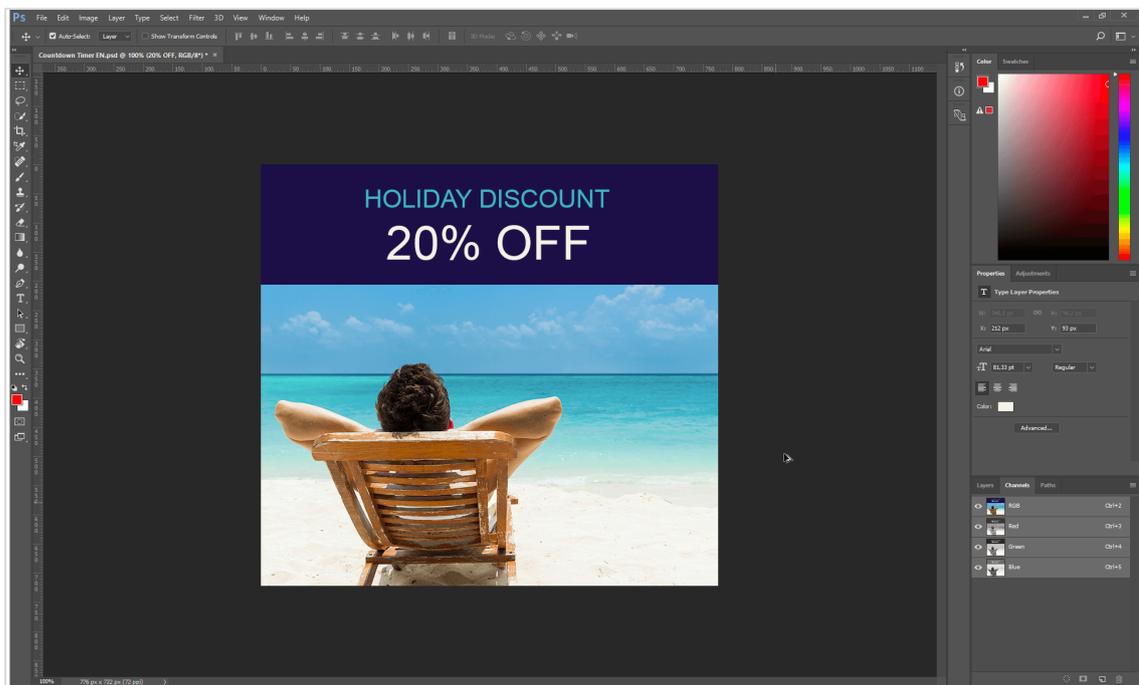
4. Export the image as a JPEG or PNG.

5. Create the area for the countdown timer. For this area, start with a new graphic file or continue working with your finished product image/key visual using the file in your image editing program (not in the exported JPEG or PNG!). Later only export the countdown timer area.

> **Tip:** Continue to work on the product image/key visual file. This makes it easier to see the final result and how both parts will work together in your message.
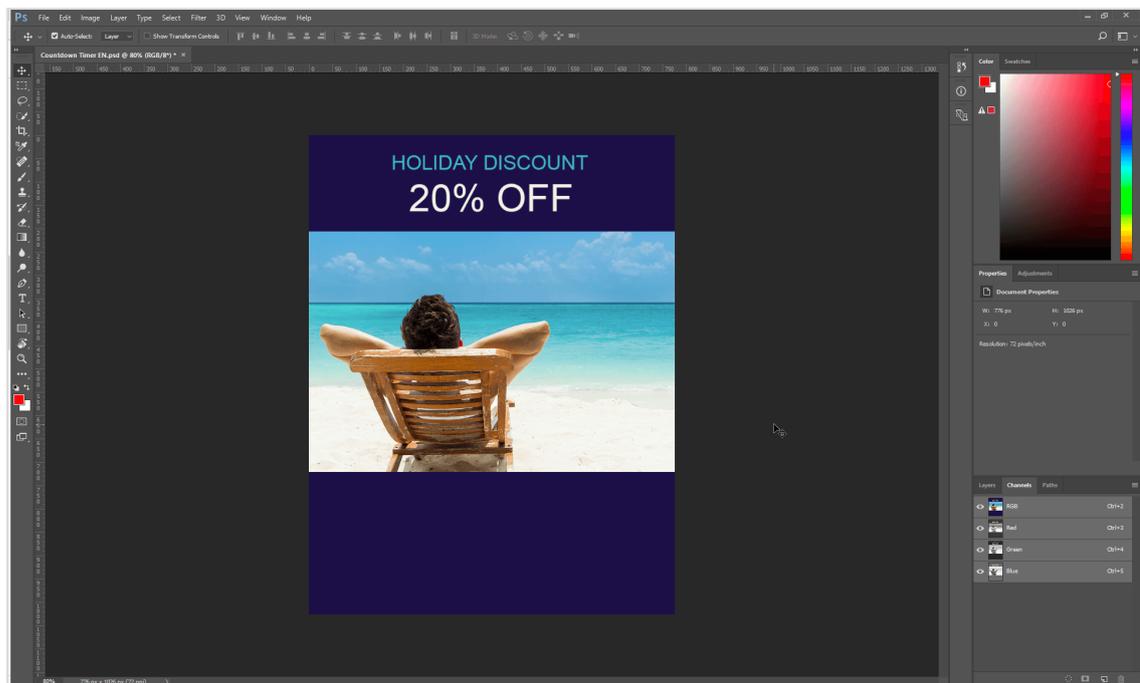
> **Warning: When creating an animated countdown timer**
>
> For the countdown timer area, avoid using complex graphic designs such as patterns, photo scenes, many colors and color gradients. This is because Episerver Campaign will convert the JPEG or PNG into a GIF animation with 60 individual images. This GIF animation may not exceed 1.5 MB.
>
> Even if you use a highly compressed JPEG with a file size of a few KB that contains many colors, the subsequently generated GIF animation may exceed the maximum size of 1.5 MB.
>
> **When creating a static, non-animated countdown timer**
>
> The maximum file size for the countdown timer area is 500 KB.

6. To test the positioning of the countdown timer, which will come later, create a test timer with the testing tool for your image editing program.
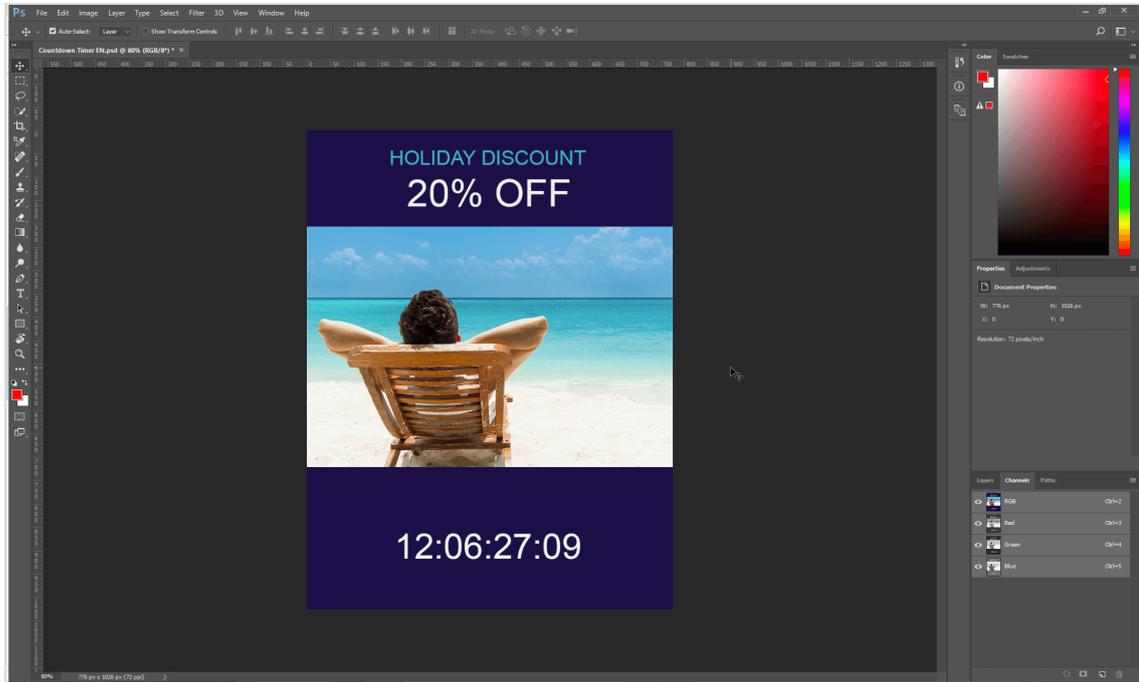
You can select among the following formats:

Static countdown timers

- Days, hours, minutes, seconds (dd:hh:mm:ss)
- Hours, minutes, seconds (hh:mm:ss)
- Days, hours, minutes (dd:hh:mm)
- Hours, minutes (hh:mm)
- Days only (dd)

Animated countdown timers

- Days, hours, minutes, seconds (dd:hh:mm:ss)
- Hours, minutes, seconds (hh:mm:ss)

You can use the following fonts/typefaces:

- Arial
- Arial bold
- Arial italics
- Arial black
- Arial Unicode MS
- Comic Sans MS

- Comic Sans MS bold
- Courier New
- Courier New bold
- Courier New italics
- Courier New bold and italics
- Times New Roman
- Times New Roman bold
- Times New Roman italics
- Times New Roman bold and italics
- Trebuchet MS
- Trebuchet MS bold
- Trebuchet MS italics
- Trebuchet MS bold and italics
- Verdana
- Verdana bold
- Verdana italics
- Verdana bold and italics

> **Warning:** Note the font and hexadecimal code for your font color. You will need this information later.

The example uses Arial font with the color white (#FFFFFF).

7. Optional: Insert additional graphic elements into your test timer. The example places a border around the timer, labels the timer with *days*, *minutes*, *hours* and *seconds*, and inserts the text *Offer ends in:*.
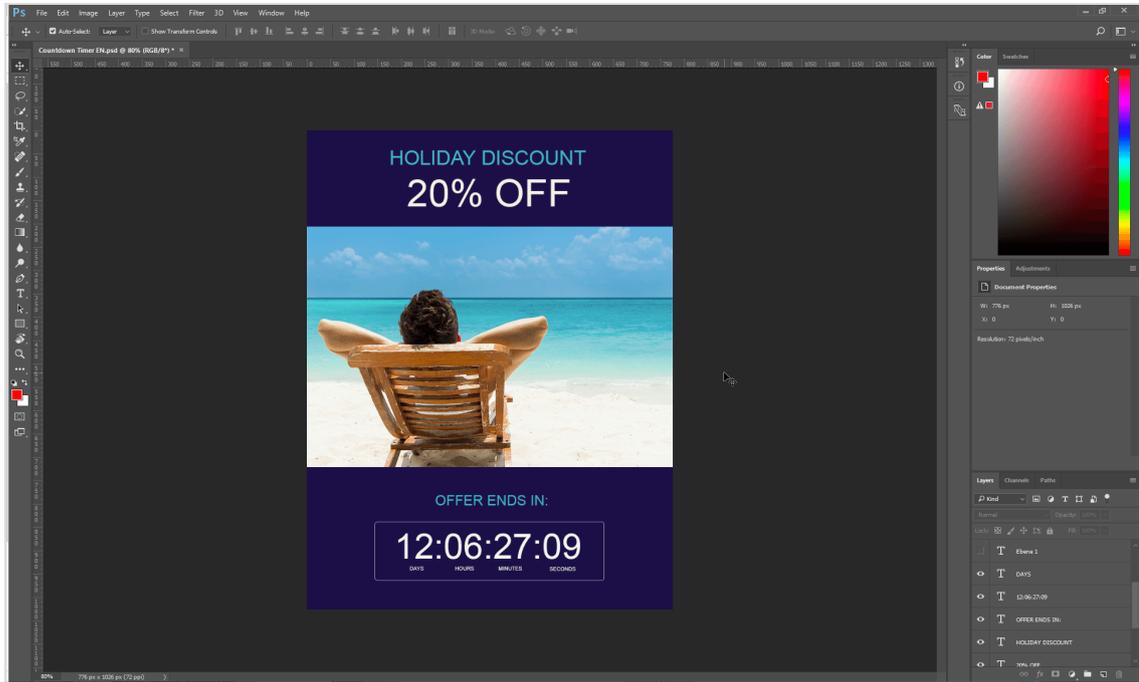
8. If you are satisfied with your layout, remove the key visual from your graphic so that the area for the countdown timer stands alone. You can do this in Adobe Photoshop, for example, using the crop tool. The example uses the crop tool to reduce the graphic to the area with the timer.
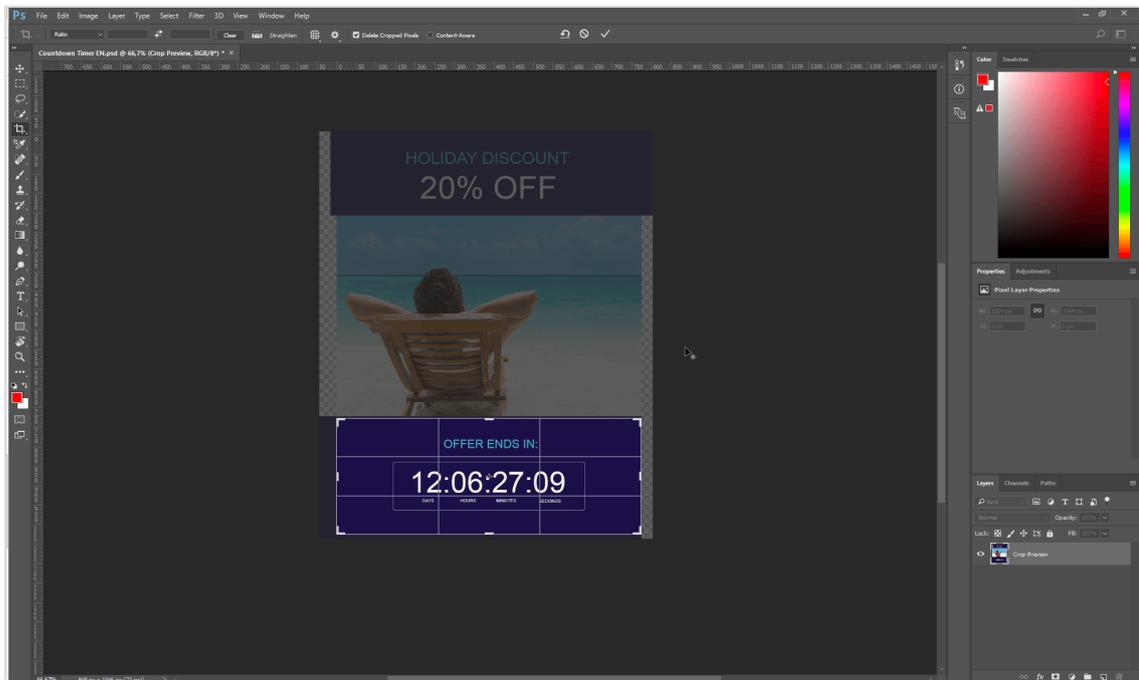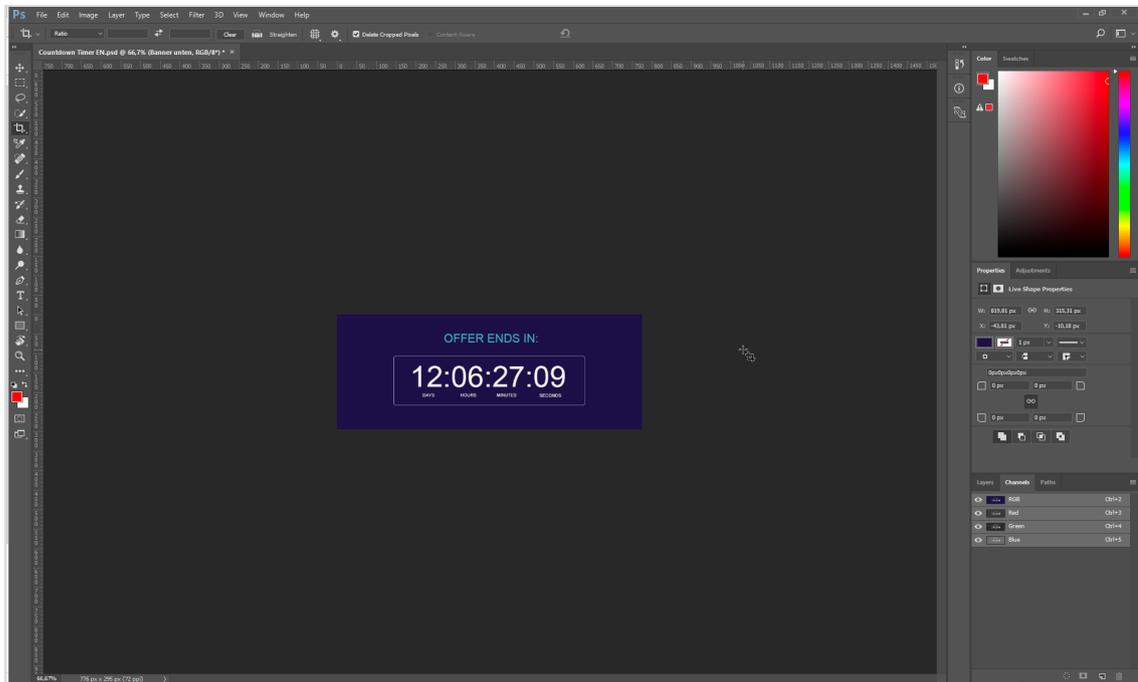
9. Remove the test timer by deactivating or deleting the corresponding layer. If you inserted other graphic elements, leave them activated. The example deactivates the layer with the test timer in Adobe Photoshop. The border, the timer labels and the lines of text are still active.

> **Tip:** Insert the final timer later in Episerver Campaign using the information you recorded regarding font and font color. The graphical representation of the area you created will later serve as the background for the final timer.
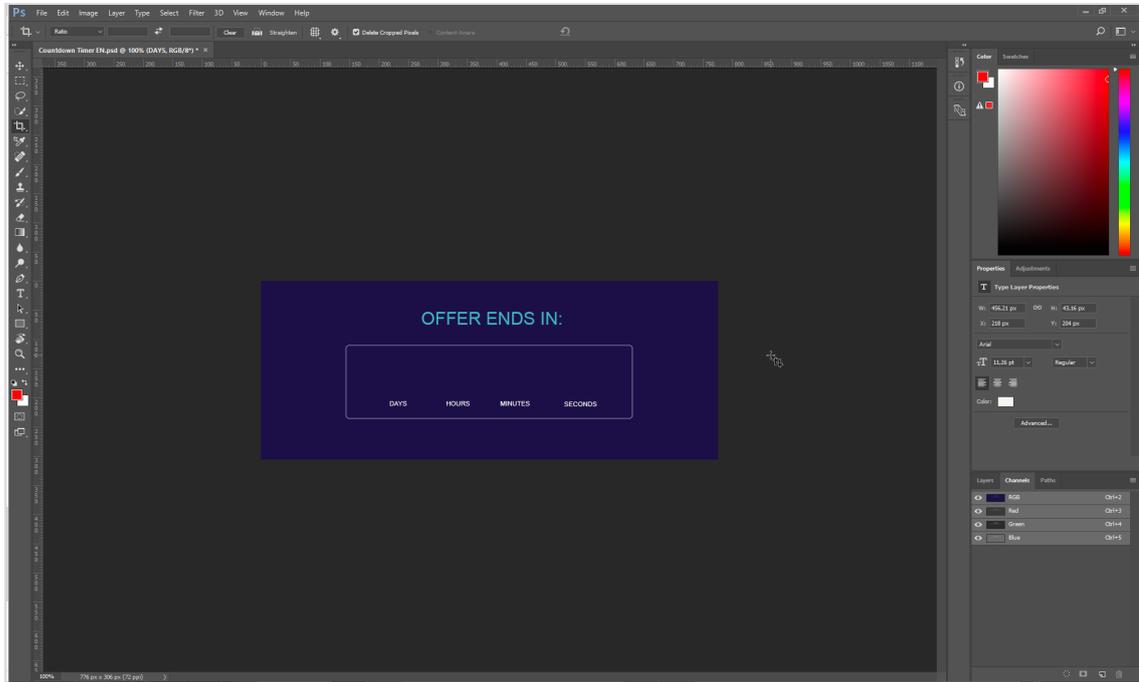
10. Export the area or background for the timer as a JPEG or PNG. Make sure that the file size does not exceed 20 KB (approximate value). When creating a static, non-animated countdown timer, the maximum file size is 500 KB.

You have now prepared both parts of the countdown timer. **Creating a countdown timer** shows how to create the final timer in Episerver Campaign and place it on your background graphic.

Creating a countdown timer

Prerequisite: You prepared a background image, as explained in **Preparing graphics**.

1. Open the start menu and select **Special** > **Countdown timer**. The **Countdown timer** window opens.
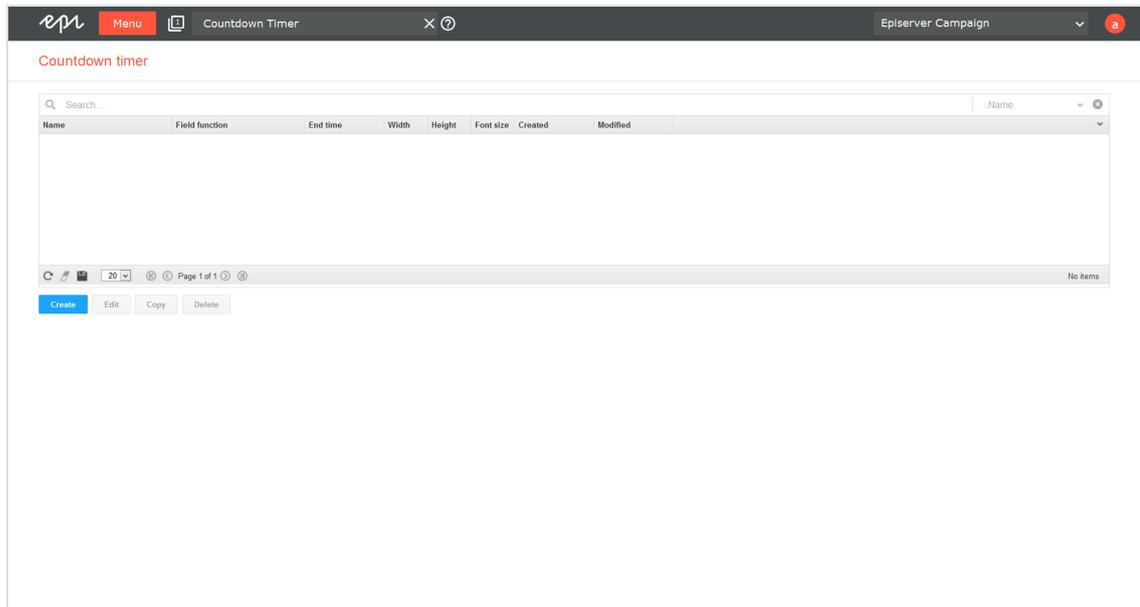
2. Click **Create**. The **Create countdown timer** window opens.
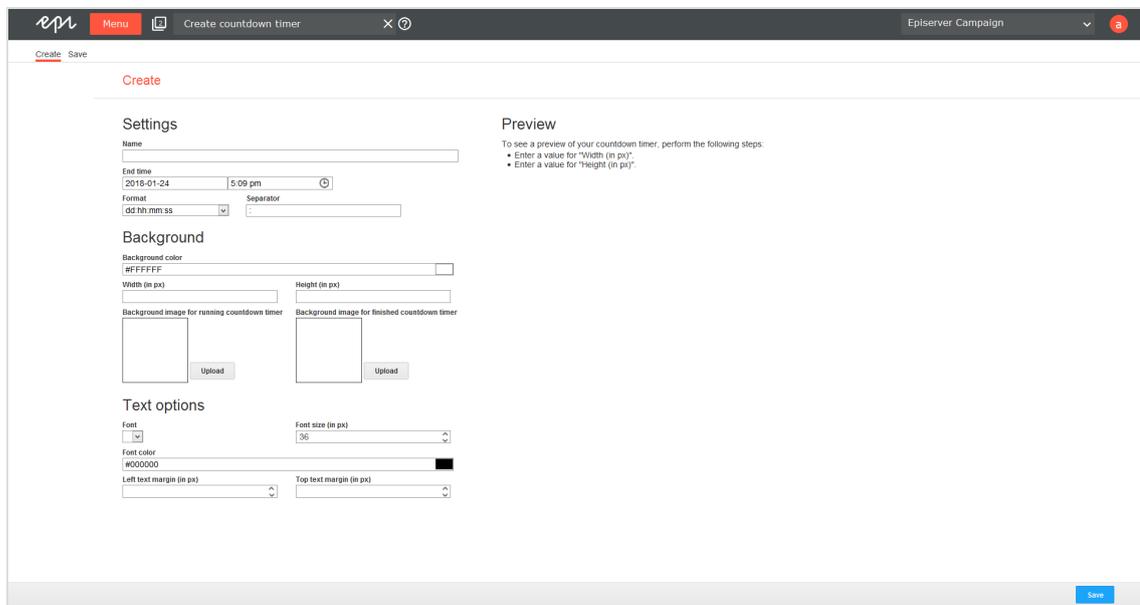
- **Name**. Enter a name for your countdown timer.
- **End time**. Enter the date (left part of box) and the time (right part of box) at which your countdown timer will end.

- **Format**. Select the timer format and if your timer is animated or non-animated. See **How it works**.
- **Separator**. Enter the separator you want to use between the counter digits. By default, the colon (:) is used. You can use a string of up to 5 characters. If you do not want to use a separator between digits, enter a space.
- **Background color**. Select a background color for the timer by entering a hexadecimal value or using the color selection tool. If you prepared graphics for the countdown timer, you do not need to enter a background color. The timer is then automatically set to have no background color for your background image.
- **Background image for running countdown timer**. Upload a prepared background image (in JPEG, PNG, BMP or GIF format, with height and width values between 100 and 800 pixels) by clicking **Upload** and selecting an image. If you followed **Preparing graphics**, upload the second part of your top offer into the area you created for the timer. You will use the prepared product image/key visual later. Then, you will combine the product image/key visual and the finished countdown timer into a single graphic and insert it into your message (see **Inserting a countdown timer into a message**).

> **Note:** Make sure to follow the **design guidelines** for background images.
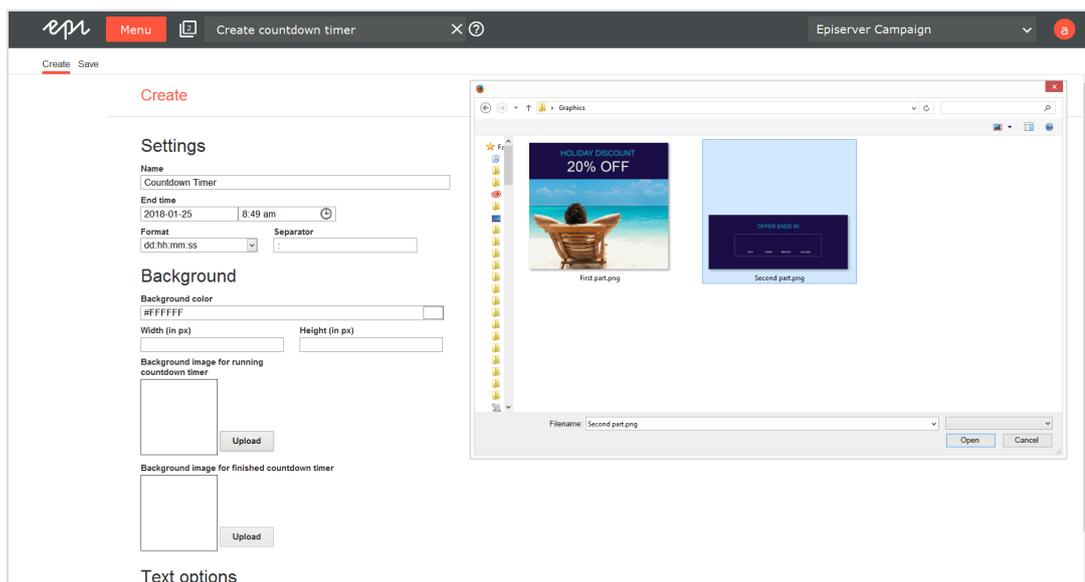
- **Background image for finished countdown timer**. To upload a background image (in JPEG, PNG, BMP or GIF format, with height and width values between 100 and 800 pixels) to be displayed in your messages when the countdown timer has run out. Click **Upload** and choose an image. If you do not, when the time runs out, the background image for running countdowns is displayed with digits set to zero.
- **Width (in px)**. Enter the width of the timer background. If you uploaded a background image, its width is entered.

- **Height (in px)**. Enter the height of the timer background. If you uploaded a background image, its width is entered.

- **Font**. Select the font and the font style for the digits of the timer. If you followed the example in Pre-paring graphics, enter the font you used for the test timer in your image editing program.

- **Font size**. Enter the font size of the timer in pixels (px), at least 12 px. If you followed the example in Preparing graphics: enter the font size you used for the test timer in your image editing program.

- **Font color**. Enter the font color for the timer as a hexadecimal code or use the color selection tool. If you followed the example in Preparing graphics, enter the font color you used for the test timer in your image editing program.

- **Left text margin (in px)**. Enter the distance between the timer and the left edge of the image. Use the preview to review the desired placement of the timer.

- **Top text margin**. Enter the distance between the timer and the upper edge of the image. Use the preview to review the desired placement of the timer.

3. Click **Save**.

4. Click **Close**. The **Countdown timer** window opens. If you select a created countdown timer from the list, a preview of the countdown timer is shown.

Inserting a countdown timer into a message

You can insert into a message a countdown timer by itself, or combine it with a product image/key visual to make a single graphic.

Inserting a freestanding countdown timer

> **Note:** The following instruction shows the procedure using the [Template Kit](). If you use a custom template, the steps may differ.

1. Select your message and click **Edit**. The **Edit content** window opens.
2. Click **New: Content paragraph** to create a new content paragraph. On the right, a window for selecting the paragraph type opens.
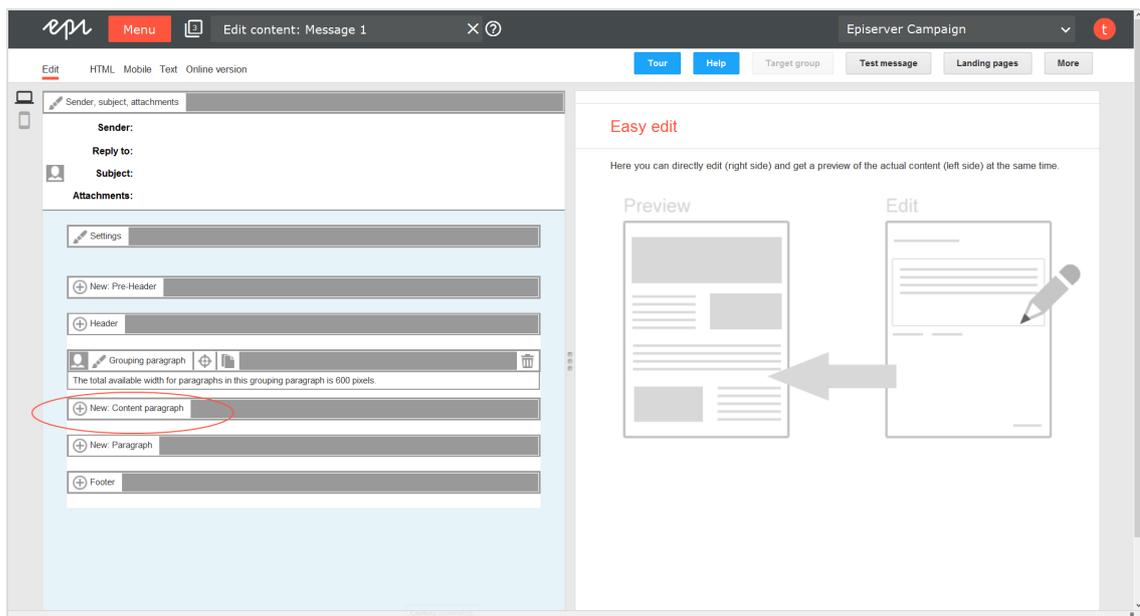
3. Click **Text/Image**. The configuration window for the selected paragraph type opens.
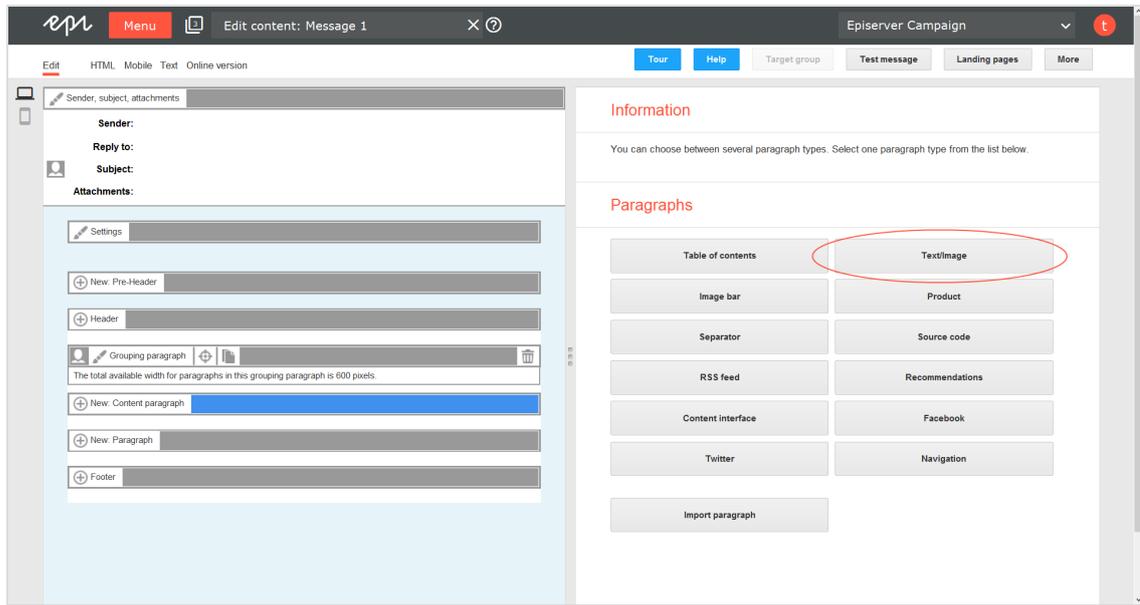
4. Click **Insert field function** ![icon] in the **Text** area. A window opens with a list of field functions saved in your client.
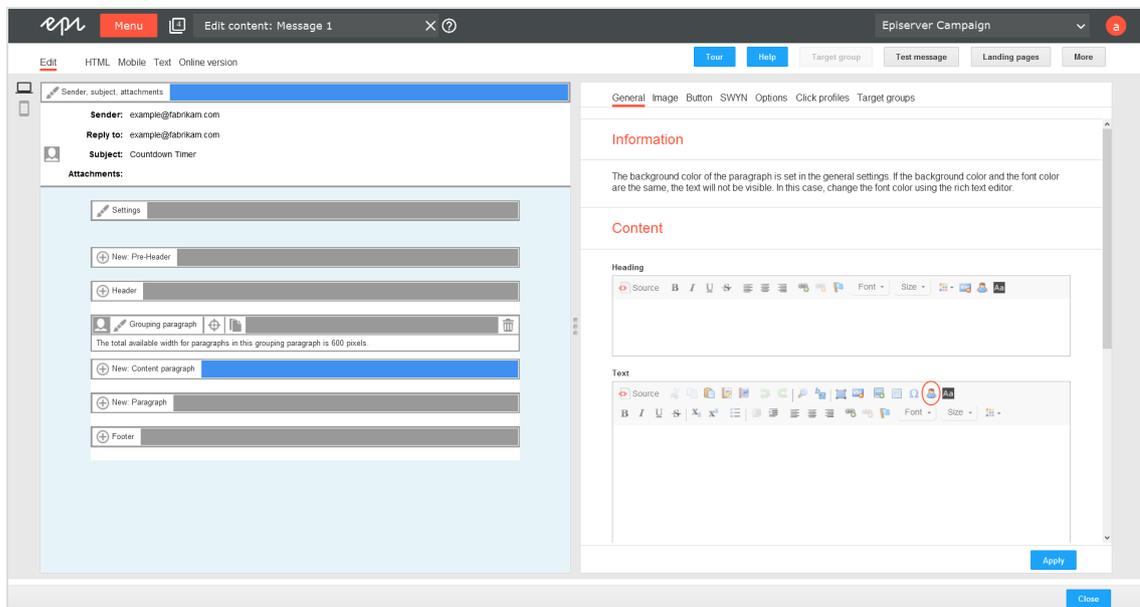
5. Select the field function of the countdown timer you want to insert into your message. Click **OK**.
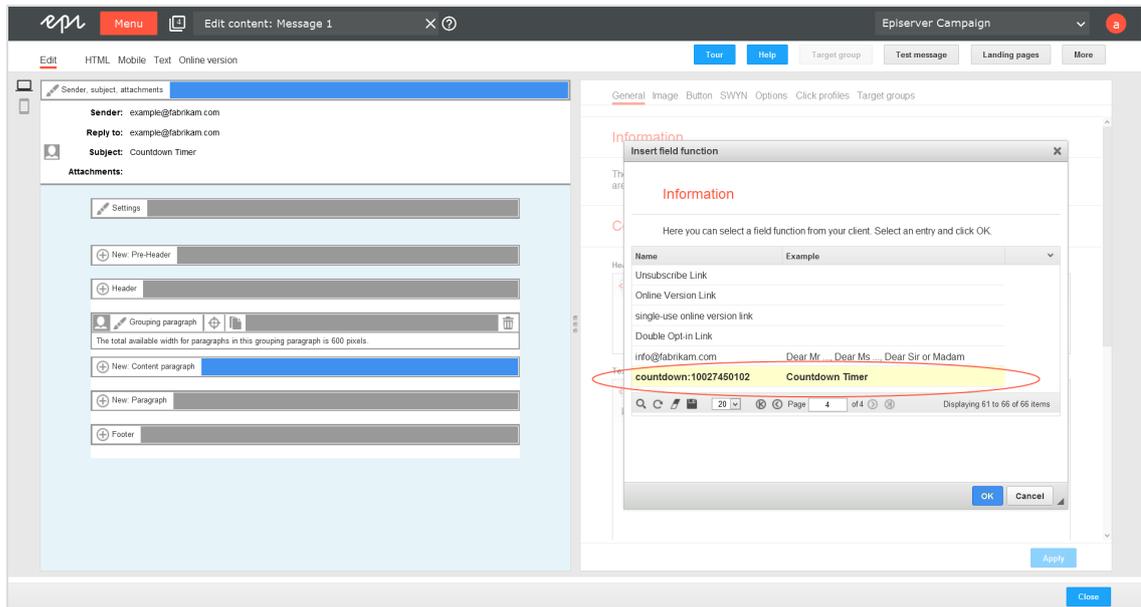
6. Click **Apply**.

> **Tip:** The countdown timer does not show in real time in the preview. But, you can send a [test message](#) to yourself to preview the countdown timer before mailing the newsletter. To do so, click **Test message** in the upper right of the Template Kit.
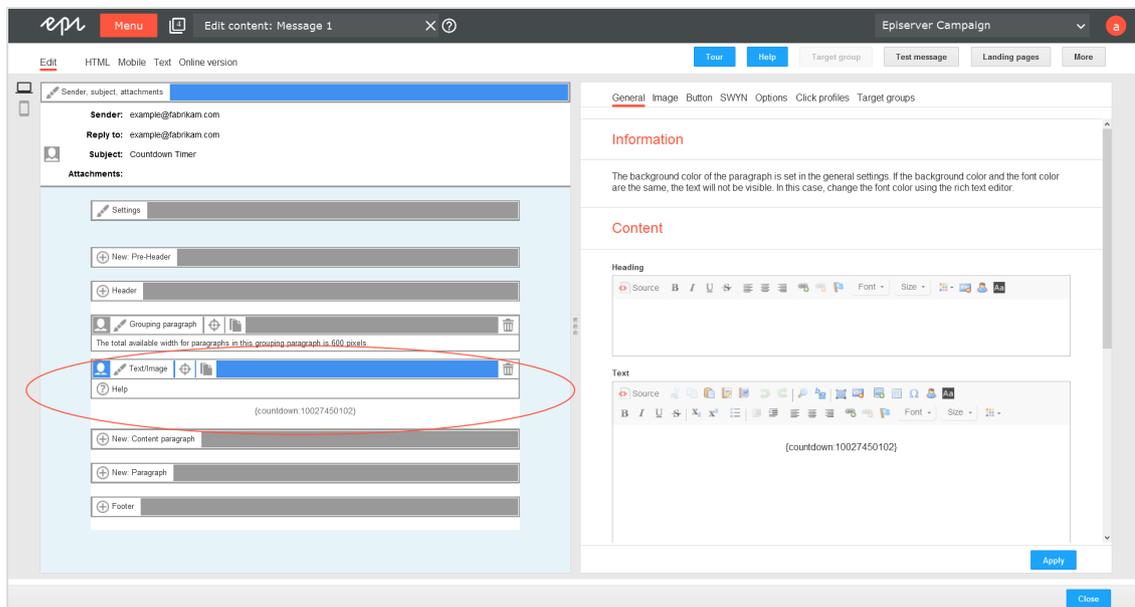
Combining countdown timer with a product image/key visual

If you prepared graphics for the countdown timer (see Prepare graphics) and created the counter for the countdown timer (see Create a countdown timer), you can combine the product image/key visual and the countdown timer into a single graphic.

> **Note:** The following instruction shows the procedure using the Template Kit. If you use a custom template, the steps may differ.

The basic procedure places the product image/key visual and the timer separately into two paragraphs positioned one above the other, with no spacing between. For the combining process, create a new grouping paragraph.

1. Select your message and click **Edit**.
2. Click **New: Paragraph** to create a new grouping paragraph in your message. On the right, a window for selecting the paragraph type opens.

3. Click **Grouping paragraph**.
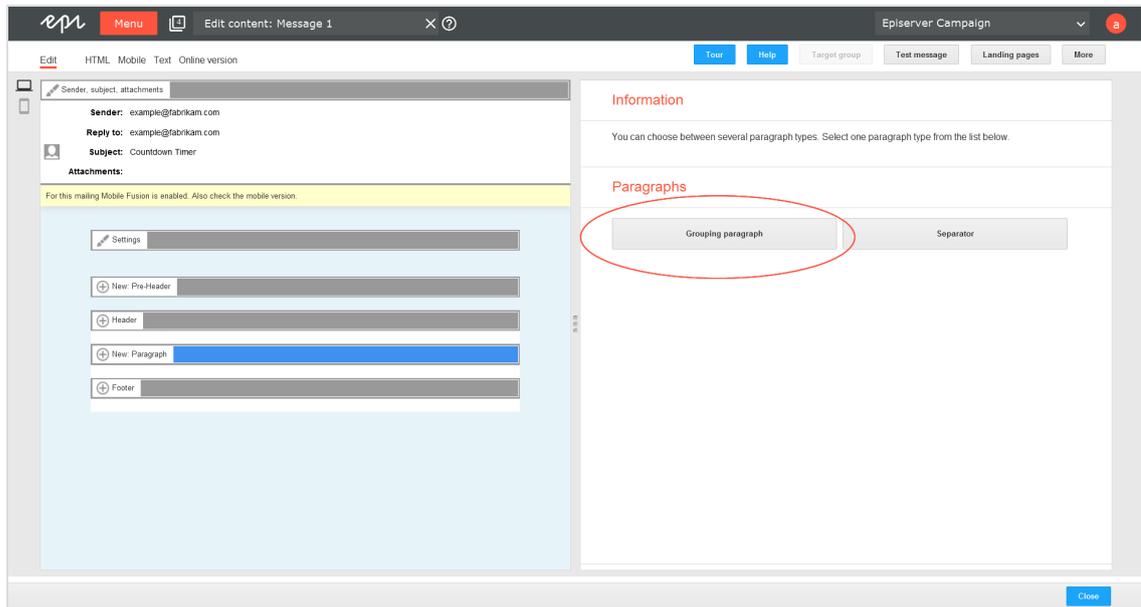
4. Enter **0** under **Layout**, in the **Space between content paragraphs** box.

> **Warning:** If you forget to enter **0** here, in some cases, your product image/key visual and the countdown timer will not be seamlessly combined.
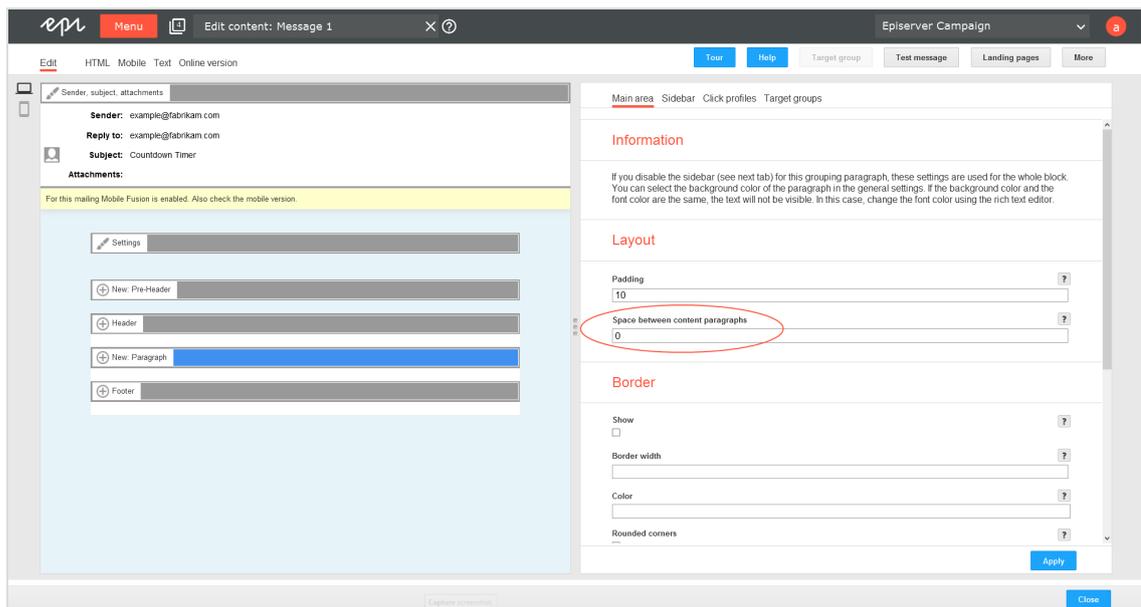
5. Click **Apply**.

6. To insert a new content paragraph for your product image/key visual into the grouping paragraph, click **New: Content paragraph** on the left side of the preview, under the new grouping paragraph. On the right, a window for selecting the paragraph type opens.
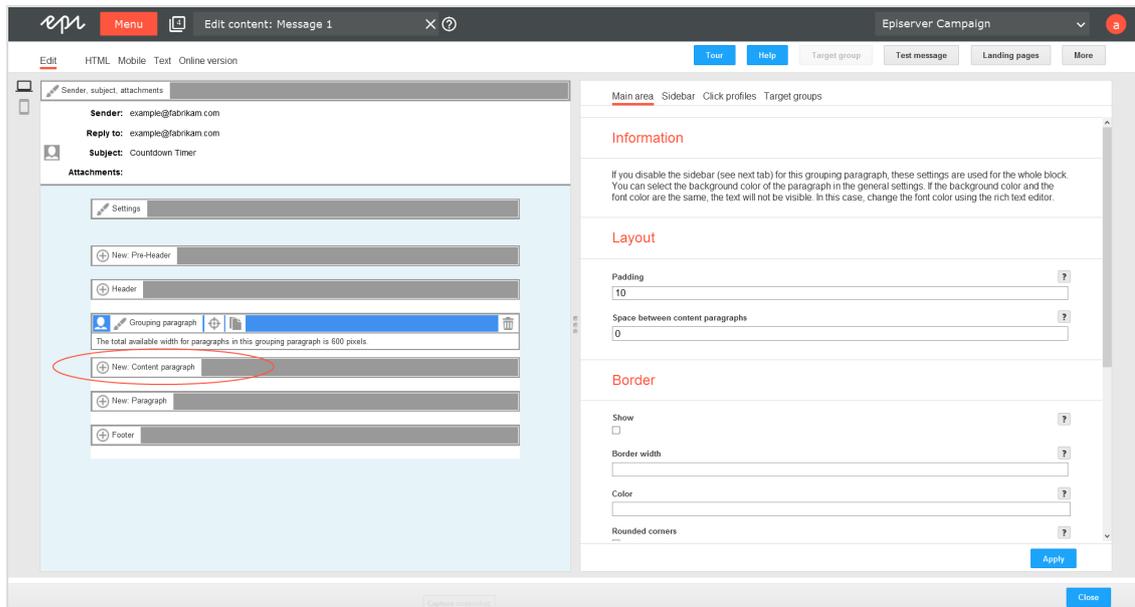
7. Click **Text/Image**.
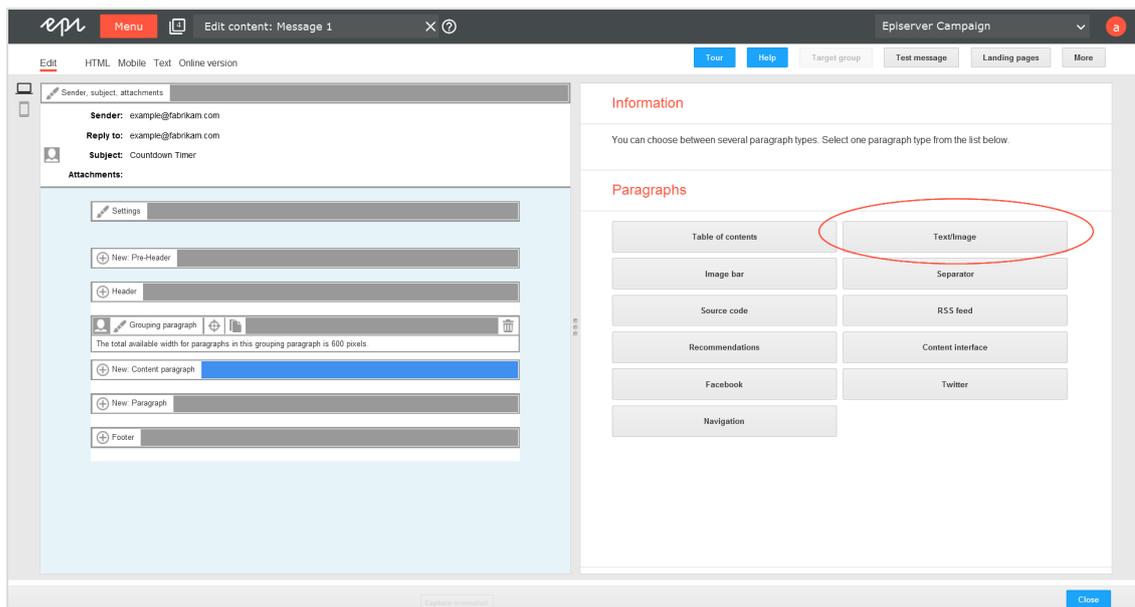
8. Open the **Image** tab, click **Browse…** and select an image in the file browser to upload your product image/key visual. If your visual is saved externally, enter the URL.
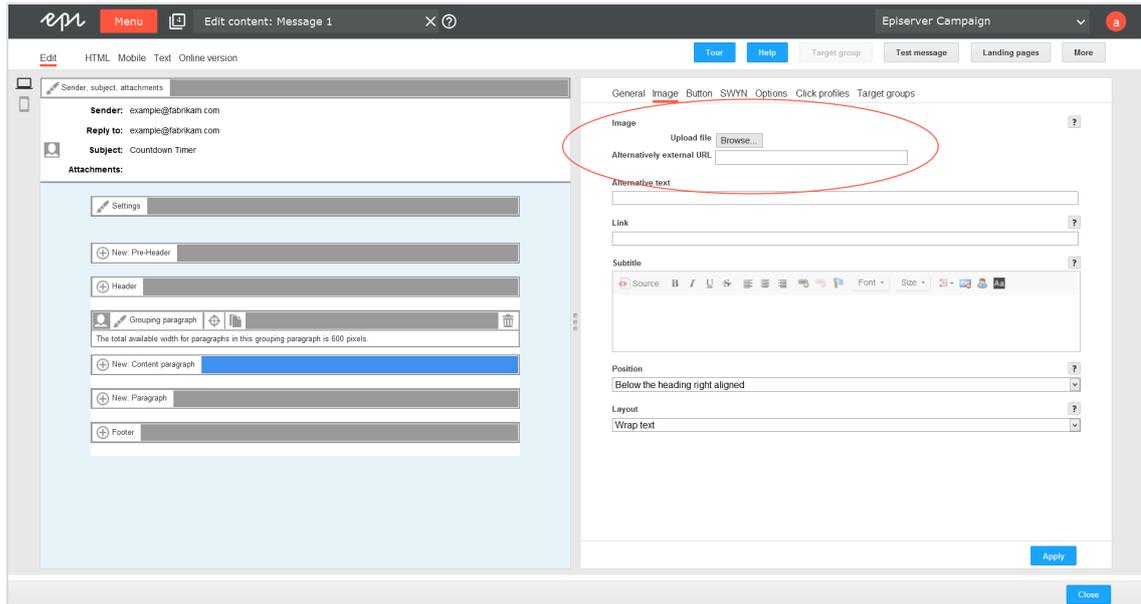
9. Center the product image/key visual by selecting one of the centering options from the list found under **Position**, for example **Centered below the link**.
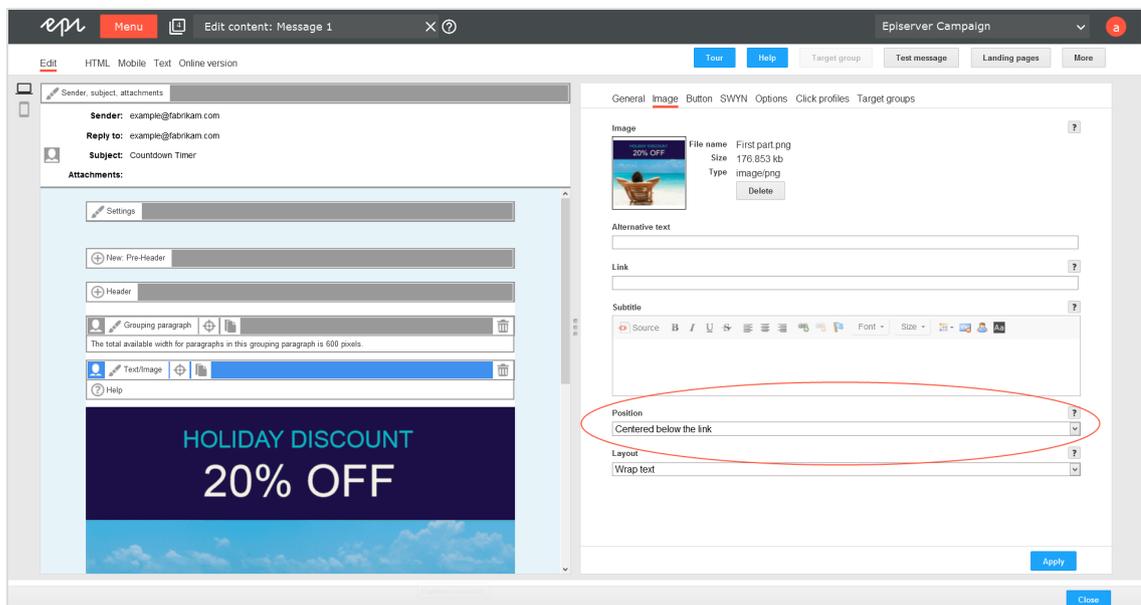
10. Click **Apply**.

11. To insert another new content paragraph for the countdown timer into your grouping paragraph, click **New: Content paragraph** on the left side of the preview. On the right, a window for selecting the paragraph type opens.
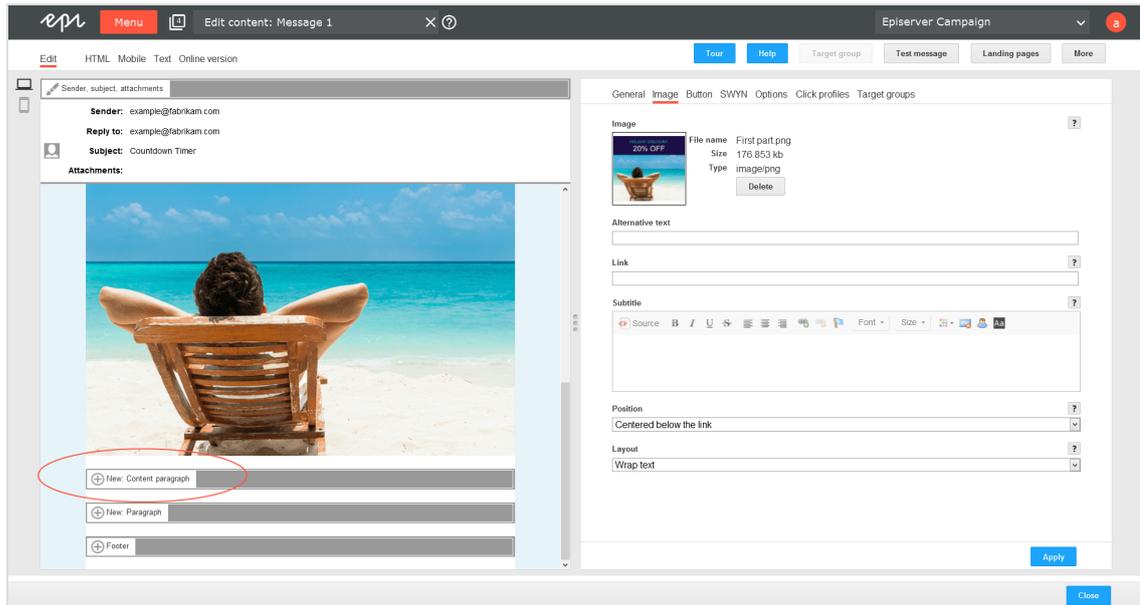
12. Click **Text/Image**.

13. Click **Insert field function** in the **Text** area. A window with a list opens. The list contains field functions that were saved in your client.
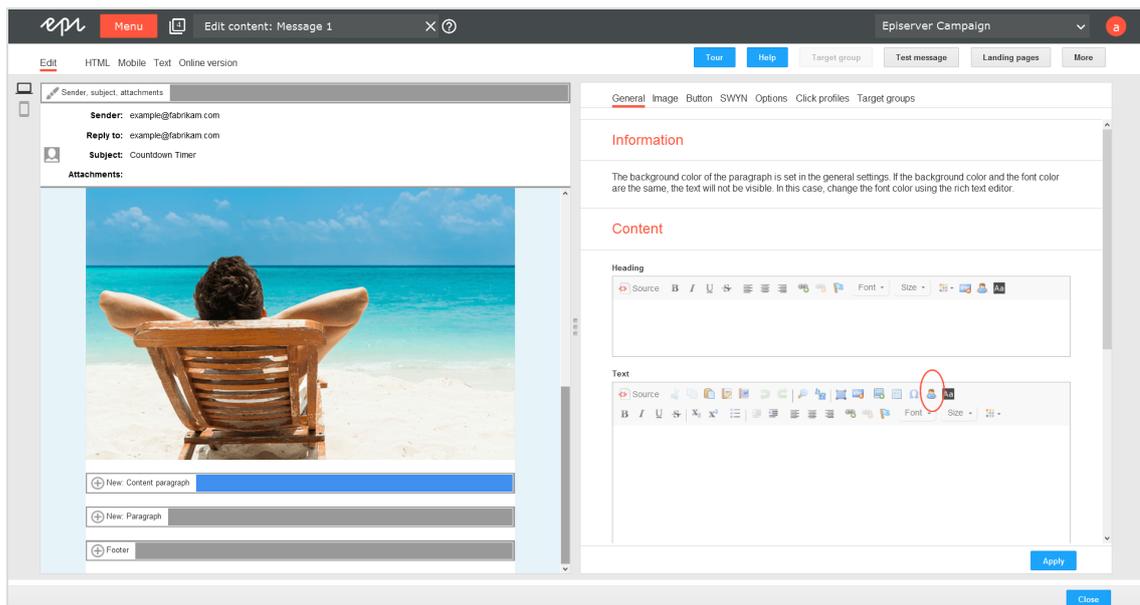
14. In the list, select the field function for the countdown timer that you want to insert into the content paragraphs and click **OK**.
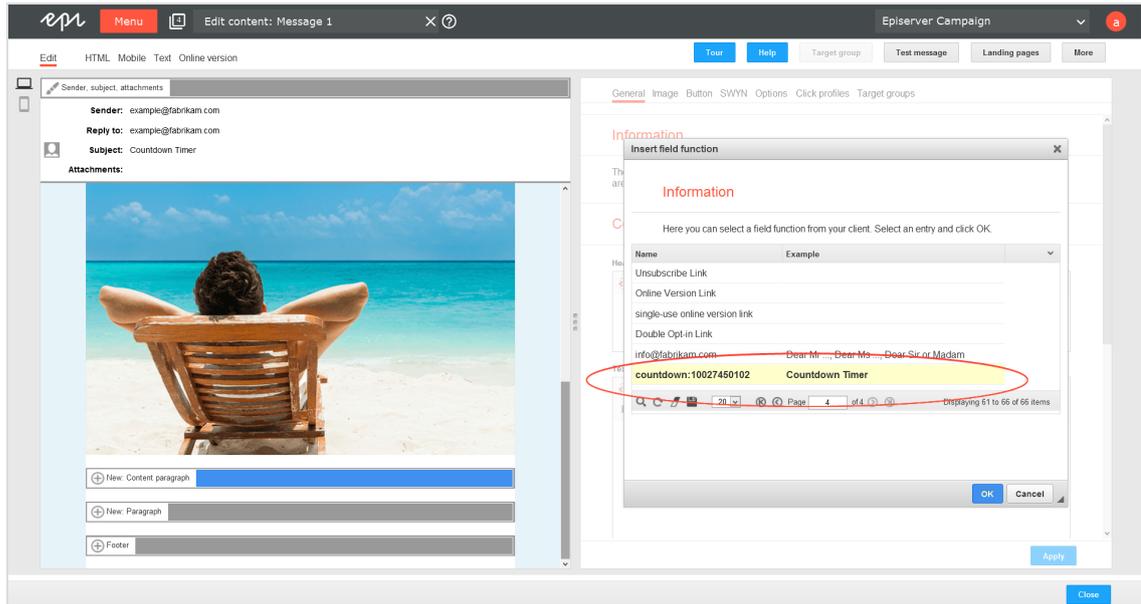
15. Click **Center** to center the inserted field function.
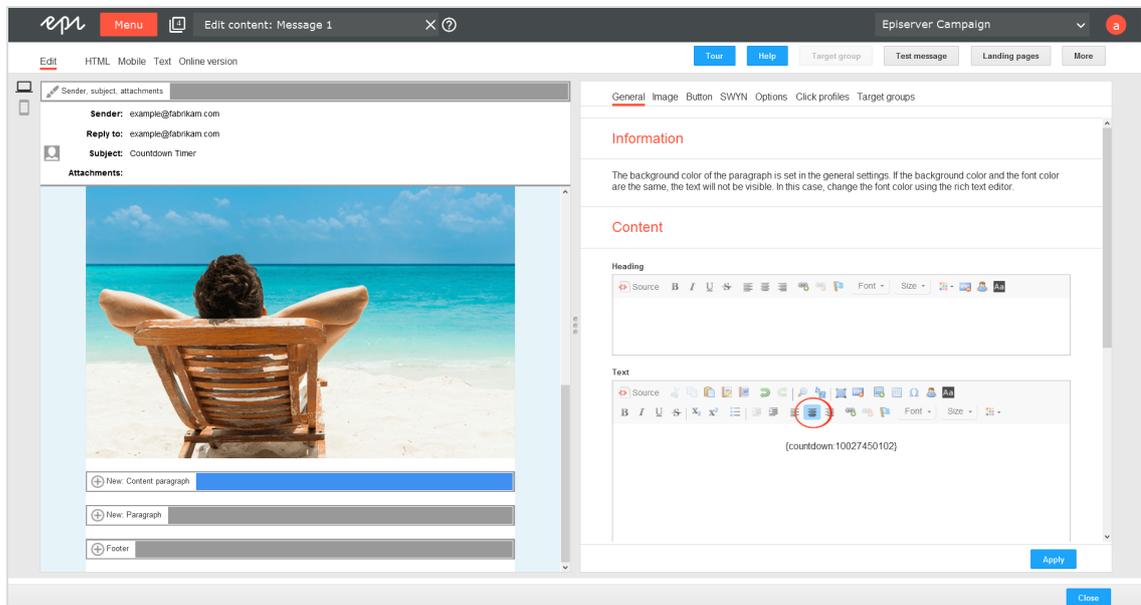
16. Click **Apply** to save your changes.

> **Note:** The countdown timer does not show in real time in the preview, but you can send yourself a test message.
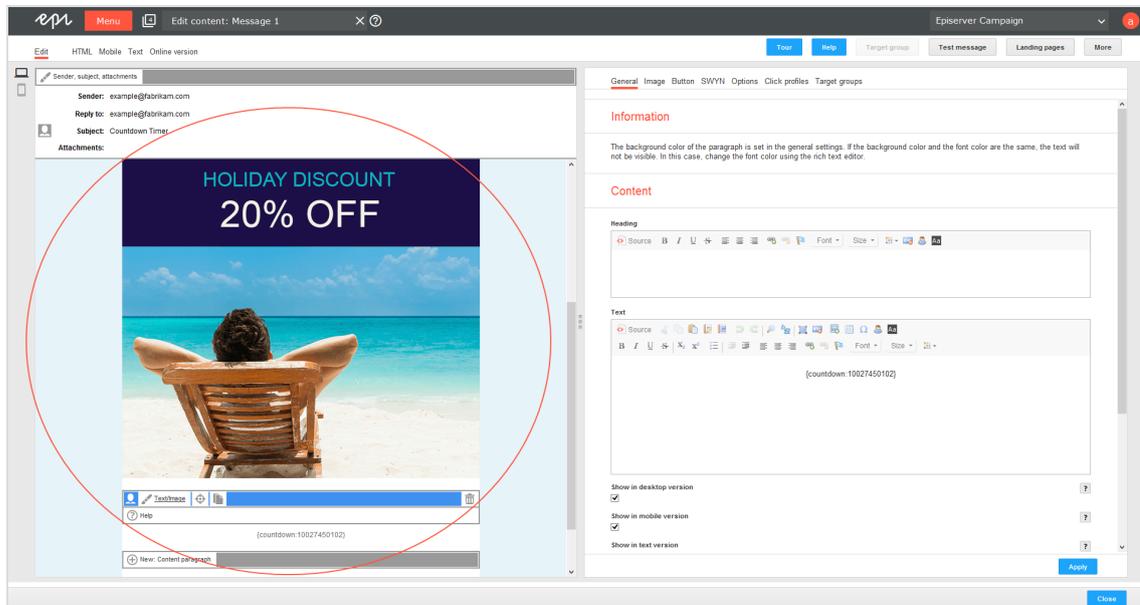
17. Before sending the message to recipients, check that the image merge is successful by sending a test message to yourself.

Editing, copying, and deleting a countdown timer

Editing a countdown timer

1. Open the start menu and select **Special** > **Countdown timer**. The **Countdown timer** window opens.

2. In the overview, select a countdown timer and click **Edit**. The **Edit countdown timer** window opens.
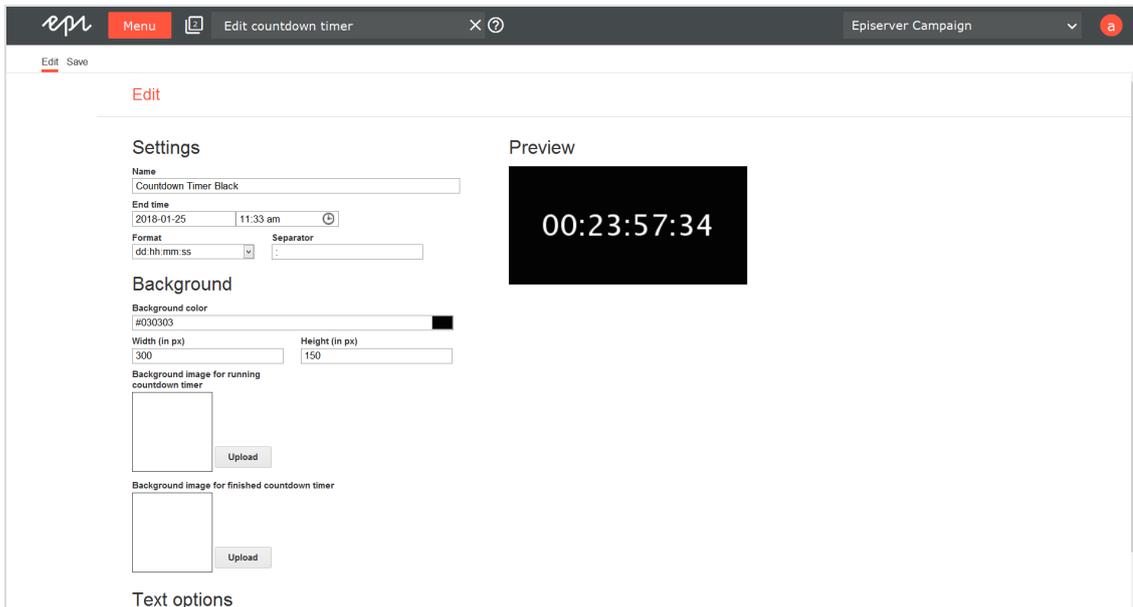
3. Make your changes (see Creating a countdown timer).
4. Click **Save**.

Copying a countdown timer

1. Open the start menu and select **Special** > **Countdown timer**.
2. copy and click **Copy**.
3. Optional: Edit the copy and give it a new name.
4. Click **Save**.

Deleting a countdown timer

> **Warning:** Do not delete countdown timers that are in use in ongoing mailings.

1. Open the start menu and select **Special** > **Countdown timer**.
2. In the overview, select the countdown timer that you want to delete and click **Delete**.
3. Click **Delete countdown timer**.

Troubleshooting countdown timers

The following are common errors that can arise while working with the countdown timers.

> **Tip:** If the issue continues after you attempted the suggested solution, contact [customer support](#).

Issue	Possible cause	Solution
In the message, the countdown timer is displayed wider than the product image, even though the original file for the countdown timer has the same width.	The global message width for your Episerver Campaign template or your paragraph is smaller than the width of the countdown timer.	Make the global width of the message or the width of the paragraph the same as the width of the countdown timer, or reduce the countdown timer width.
A gap between the product image and the countdown timer.	A margin is defined for your content paragraphs.	Set the margin for your content paragraphs to 0.
Animated countdown timers are not animated in Microsoft Outlook	Microsoft Outlook (version 2007 and above) does not support animated GIFs.	Open the mailing in Microsoft Outlook using the **View in browser** view.
The generated animated countdown timer exceeds 1.5 MB even though the uploaded background image is significantly smaller.	Episerver Campaign generates an animated GIF with a total of 60 images from the single background image. The file size increases exponentially and exceeds the factor 60 because Episerver Campaign adds the timer for the countdown timer to your background image.	Reduce the file size of your background image. The recommended maximum size is 20 KB. Also, avoid using complex graphic designs such as patterns, photo scenes, many colors, color gradients, and so on. Even if you use a highly com-

Issue	Possible cause	Solution
		pressed JPEG with a file size of a few KB, if it contains many colors, the subsequently generated GIF animation may exceed 1.5 MB.

Click2Go

> **Note:** Contact customer support to activate this feature.

Use Click2Go to create buttons for your mailings, with no HTML expertise, directly in Episerver Campaign's content management system. Click2Go is integrated directly into the Episerver Template Kit and can be used in any paragraph type.

Buttons are call-to-action elements with great potential for capturing attention and directing readers to landing pages for products, campaigns, profile pages, and so on.

> ### Tip: Test your button's potential
>
> To test how much attention a button captures in the context of a mailing, use the automated attention analyses from Episerver Campaign. Attention analysis indicates whether a button's location captures a high level of attention and directs readers to desired content.

Activating Click2Go

When Click2Go is activated, content paragraphs display a new **Button** tab. Design the buttons as described below, and test them using a test email.

Inserting and designing buttons

To insert a button into a paragraph and edit it, perform the following steps:

1. Edit the paragraph in which you want to add a button.
2. Select the **Button** tab in the top tab bar. The following areas are displayed:

    - **Template**. In this area, you can insert two button templates into your mailing. The templates are provided along with the Click2Go function.
    - **Options**. In the tabs (described below), you can create a new button or edit an available template.
    - **Preview**. Shows the current design of your button in real time.

    > **Tip:** When you are finished, test your buttons in a [test email](#).

General

Parameter	Description
Text	Enter the button text.
URL	Insert a destination URL to which your button should link. > **Note:** If you do not name a destination URL, the button will appear in your messages.
Alignment	Set the position of your button in relation to other content elements of your mailing.

Text

Parameter	Description
Font type	Select the text font.
Color	To define the color of your button border, click the displayed value then set the desired color in the selection window.
Size	To set your text size, adjust the value manually or via the slider.

Parameter	Description
Bold	To make your text bold, select the check box.
Italic	To make your text italic, select the check box.
Underline	To make your text underlined, select the check box.

Background

Parameter	Description
Color	To select your button's background color, click the displayed value then select the color in the selection window.
Image	To select a background image for the button, click **Browse…** and select the image from your computer. Alternatively, use the **Alternatively external URL** box. Background images may not be displayed, depending on the email software and the recipient's security settings. **Note:** If you select a background image, specify an additional background color as a fallback, in case the background image is not displayed.
Alignment	Set the position of your background in relation to the other content elements.
Repeat	Select an uploaded image to be repeated in various arrangements.

Symbol

Parameter	Description
Image	To select a symbol for your button, click **Browse…** and select the image from your computer. Alternatively, use the **Alternatively external URL** box.

Parameter	Description
	Background images may not be displayed, depending on the email software and the recipient's security settings.
Position	Specify the position of the symbol in the foreground of your button.
Margin left	Set spacing for your border's left side of by adjusting the value manually or using the slider.
Margin right	Set spacing for the border's right side by adjusting the value manually or using the slider.

Padding

Parameter	Description
Top	
Bottom	Internal spacing (padding) indicates how much spacing is between the text and the outer edge of the button.
Left	Change this value to change the size and visual appearance of the button. You can individually define the internal spacing for each side.
Right	

Border

Parameter	Description
Width	To set the width of your border, adjust the value manually or use the slider.
Color	To select the color of the button border, click the displayed value then set the desired color in the selection window.
Radius	Define the shape of your button. A higher value produces rounder corners.

Personalizing images

Personalized images can boost response rates significantly because images convey more emotion than text alone, and have an impact even before a recipient starts reading. Personalized images are especially eye-catching when they contain the recipient's name, a unique prompt that entices the recipient to continue reading.

Mailing recipients can be sent personalized pictures to suit the occasion, for example, their name written on a birthday cake, or the travel destination they just booked on an airport display board.

How it works

Episerver has worked with leading image personalization company, DirectSmile, so that integration of their solution with Episerver Campaign is seamless. Mailings containing personalized images are edited using the same method as regular types. The personalization occurs automatically during dispatch.

The data required for personalization (for example, recipient name) is transferred together with the image URL by Episerver Campaign when the emailing occurs. The personalized image, available in real time, is located on the DirectSmile server with a unique URL. When the recipient opens the email containing the personalized image, the URL is invoked and its content is displayed in the email.

Setting up a mailing project with personalized images

You insert personalized images into mailings the same way as normal images. The image URL contains the text to be inserted in the form of a placeholder (in the example below: {name}). When the URL is invoked, the corresponding name is automatically inserted from the Episerver Campaign database.

```
http://xyz.example.com/.../streamimage.aspx?set=motifname&t={name}...
```

If personalization data is missing, a standard fallback text is inserted in the image in place of the name. For a birthday mailing, this might be *Happy birthday!*

Uniting image personalization and target groups

Various themes can be used for personalization in a single mailing. In this case, a motif is inserted for every theme, which is then allocated to one target group. You can employ different motifs for men and women.

Other obvious target group segmentations include age or location (on the basis of postal codes). If you have information on the recipients' interests (such as sports, travel, technology), these are also ideal for targeted personalized images.

Selecting a motif

DirectSmile has a wide range of pre-configured motifs for types of themes for personalization. You can view these in the online catalog. If you want to use one of the motifs for your image personalization efforts, customer support sends you a new mailing template that incorporates the formatting adjustments, so you can assess the image's impact.

Episerver can produce an image according to your request. Episerver requires a background (such as a clear sky or a meadow) along with details on how you want the text to be inserted (such as skywriting or foliage on the meadow). The image format (that is, a header spanning the entire width) is also considered during the production of the template. Episerver can depict 3D scripts, distorted perspectives, textures, shadows, and take your corporate design into account.

Personalizing images examples

Personalized images are especially beneficial as part of a lifecycle marketing campaign: to turn prospective customers into regular customers, to provide existing customers with incentives or trigger mailings, or to reactivate dormant customers. Episerver can provide information regarding the personalization of images and their incorporation in your campaign emails.

The following examples provide typical instances for effective image personalization in email marketing.

Regular mailings

Use regular mailings with personalized images to address your customers personally on special occasions, such as Christmas or New Year. If you send such types of emails regularly, let Episerver prepare a mailing template for the corresponding occasions.

Special mailings

Mailings triggered by specific events are especially suited for incorporating personalized images:

- **Birthday mailings**
- **Voucher** or bonus mailings (*Thank you for your loyalty, Ms Citizen!*)
- Competition news mailings (*Dear Mr Citizen, you have won!*)
- Mailings triggered by profile changes (*Welcome to Berlin, Ms Citizen!*)

> **Note:** A fee is charged to prepare the motif, based on expended effort. Besides normal dispatch costs, an additional change is levied per image opened by the recipient. These costs are invoiced separately. Episerver can provide a quote for image personalization in your mailings.

Easy Copy

> **Note:** Contact customer support to activate this feature.

Save time by using the intelligent Easy Copy feature. When creating messages, apply individual paragraphs (including text and images) from other messages – from any client. The imported content can be edited and adapted to the new message.

> **Note:** The source message and the target message must have the same paragraph structure. The source paragraph must be at the same structural level as the target paragraph.

To copy content from other messages to a new message, perform the following steps while in the edit mode of the Template Kit.

1. To the left of the message preview area, click **New: Content paragraph**. The right edit window shows a selection of paragraph types.
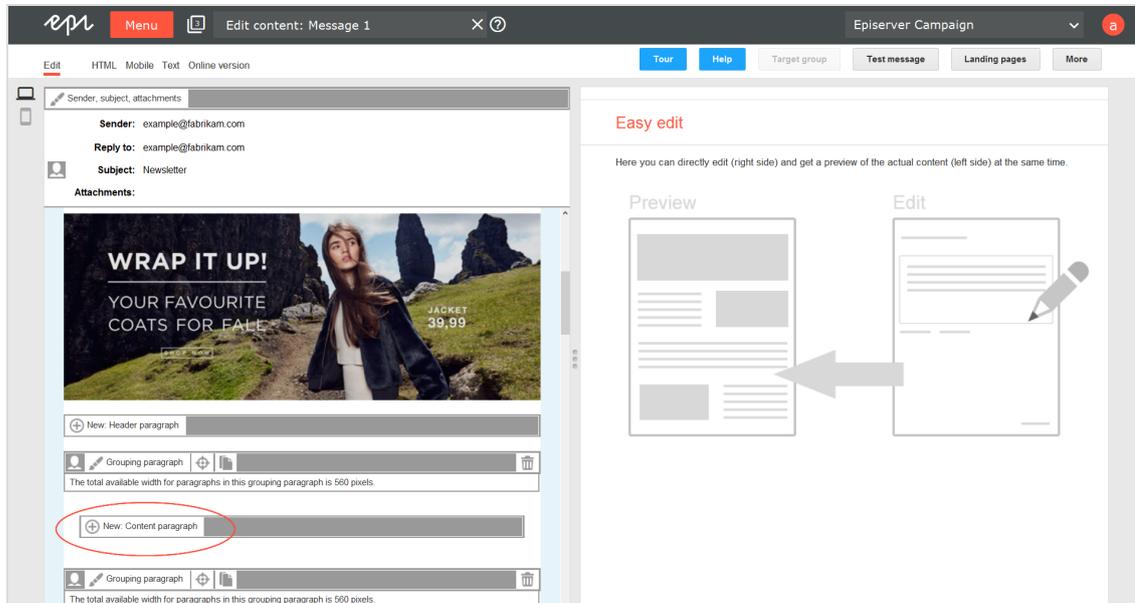
2. Click **Import paragraph**. A new window opens. You are asked to select the source content.
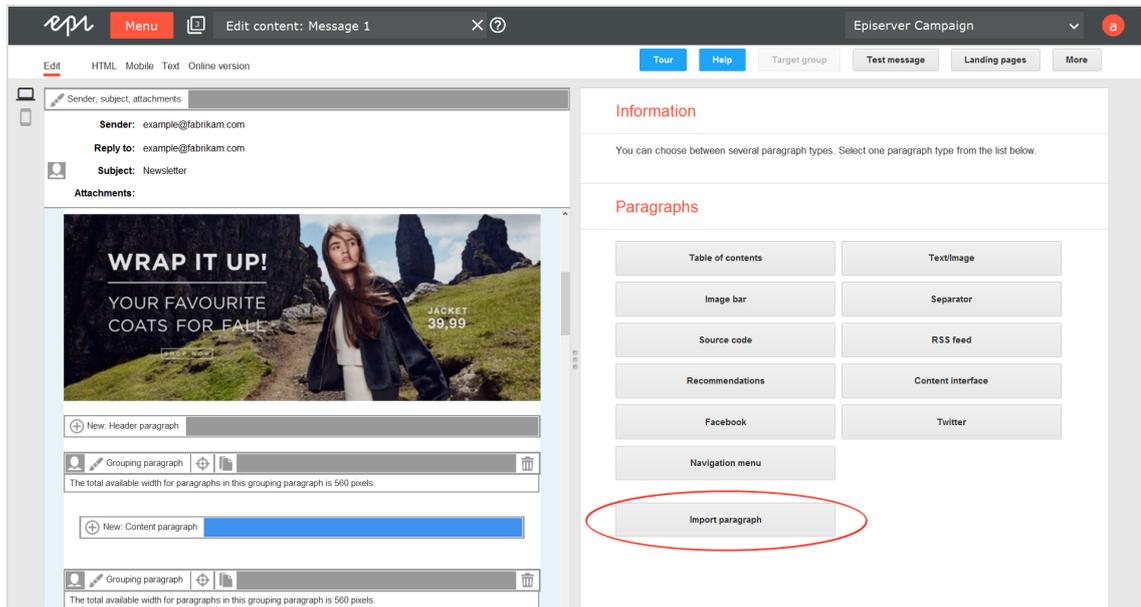
3. In the **Source client** drop-down list, select the client that contains the message or message template that you want to import.
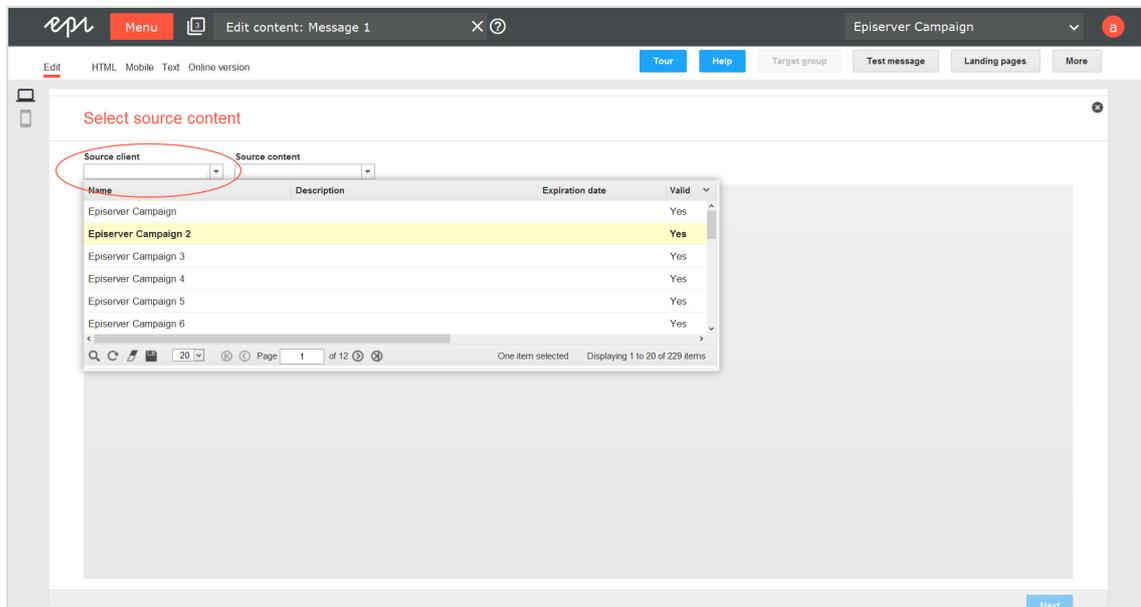
4. In the **Source content** drop-down list, select the message or message template which contains the content you want to import.

> **Tip:** If you are unsure of which message or message template contains the content, click a message or message template in the overview list to preview its content.
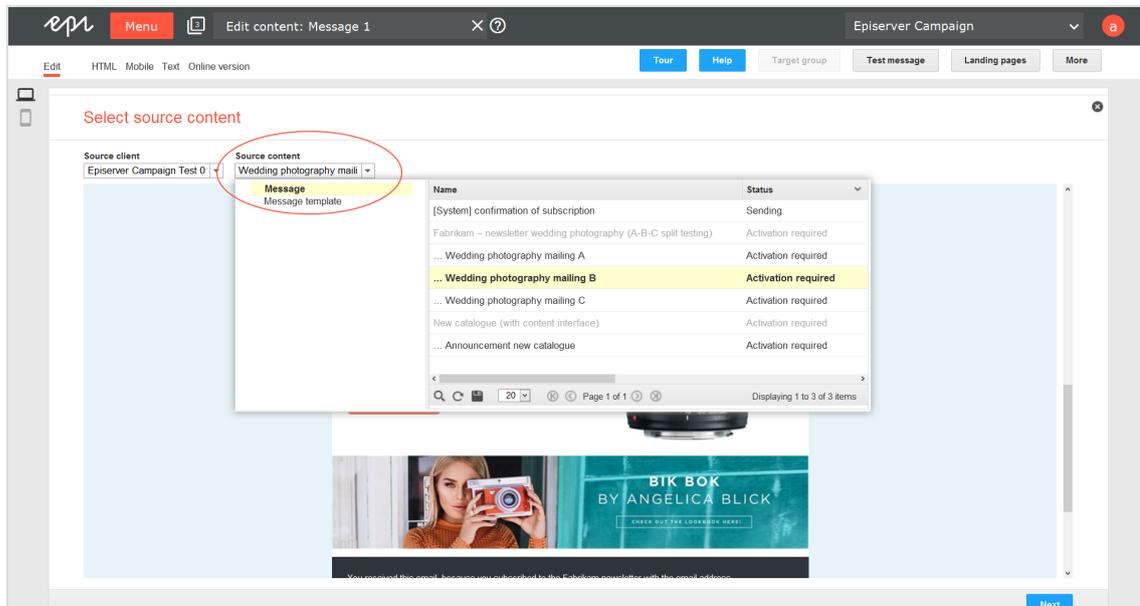
5. Select the message or message template containing the content you want to import.

> **Tip:** To import content from several messages or message templates, repeat steps 1 to 8 after you complete an import from a message.

6. Click **Next**. The **Select paragraphs** window opens.

7. Select the content you want to import by checking the relevant check box.
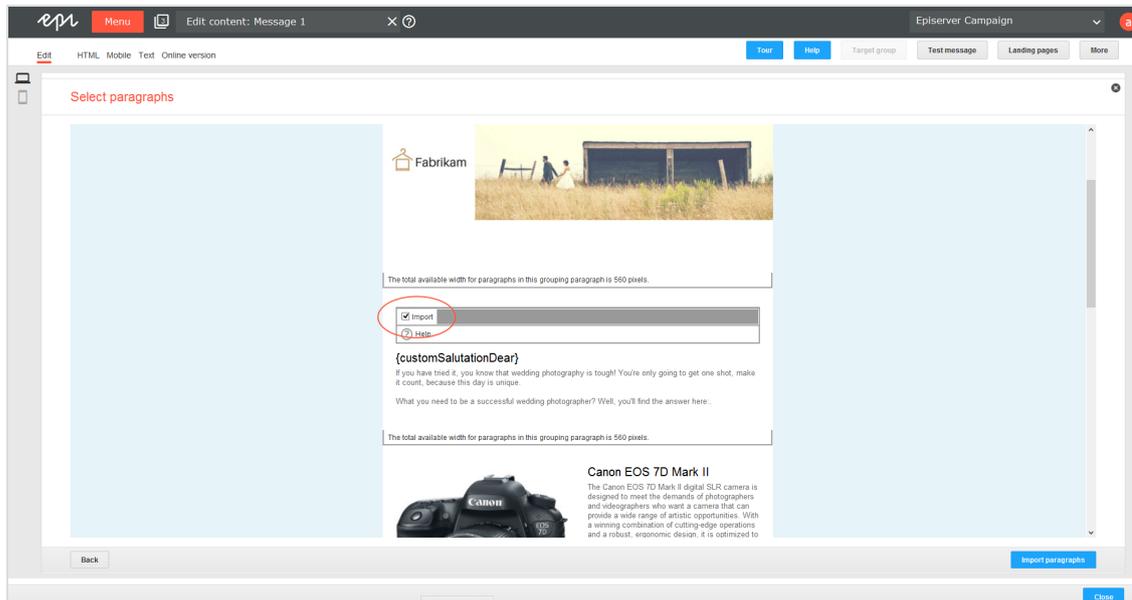
8. Click **Import paragraphs**. You can now edit the content.

Mobile Fusion

Mobile Fusion makes your templates fit for mobile devices. Up to **50 percent** of internet users regularly read email on a mobile device. Display size and usability of these devices (using a touch screen instead of a computer mouse or track pad) lead to new paradigms in newsletter design. Mobile Fusion lets you add a mobile version to your existing template and make it fit smart phones and computers.

From a usability perspective, smart phones and tablet PCs are quite different from a traditional computer. Their display sizes are significantly smaller, depending on the type of device. So, the available space should be used optimally. Scrolling should be limited to vertical, not horizontal. To increase usability, images should be displayed as large as possible, that is "fit-to-screen." Avoid a floating layout or columns. Finally, the newsletter should support the optional switch from portrait to landscape mode by rotating the device.

Checklist for a mobile version of your newsletter

- Layout's minimum width is 320 pixels
- Additional layout for a maximum width of 480 pixels recommended
- Adaption of the layout to full-screen mode
- Images displayed at optimal size
- Single-column layout preferred
- Automatic detection of display width used to adapt the newsletter layout

Adapting your template

You can adapt any newsletter template to a mobile layout. Episerver offers a full-service adaptation, where you get everything "from scratch." Or, send Episerver your mobile layout and let us implement it into your template.

Full-service adaptation

1. You indicate the template you want to adapt for a mobile version.
2. Episerver creates a layout with flexible widths (two widths, flexible display according to display size) **or** another layout using fixed width.
3. You choose a layout.
4. Episerver implements it into the template.

Benefits

- You get everything from one source and benefit from Episerver's experience in template design.
- You can be confident that Episerver's layouts work in your template.

Implementing your own layout

1. You indicate the template for which you want to implement a mobile version.
2. Episerver checks if the indicated template is suitable for flexible width or fixed width mobile layout.
3. You provide a layout with flexible **or** a fixed width.
4. Episerver implements the layout into the template.

> **Note:** The mobile layout's e Elements must follow the same order and structure as the HTML layout. For example, you cannot change the position of an image above text to a position within text.

Flexible vs. fixed-width

Ideally, mobile layouts are implemented with a flexible width that adapts to the display size ("fit-to-screen"). The best way to achieve this is a flexible layout using two widths. Any width in between the two is scaled to fit automatically, so the available display space is used optimally. At a defined width between the two defined values, the layout switches from one to the other. Displays with a higher resolution use the regular HTML layout.

> **Note:** For complex template layouts, such as where text is rendered into an image, a flexible width layout **cannot** be implemented. Episerver offers a fixed layout width for your mobile version.

Layout	Width
Flexible width	320 / 480 px
Fixed width	320 px

The above are default values. If you want different values, ask customer support.

Optimizing newsletters for mobile devices

the Episerver **Template Kit** is optionally available with **Mobile Fusion**, which applies the Template Kit's flexibility to the mobile version of your newsletters. This section helps you design mobile newsletters and integrate them into the mobile version of your mailings.
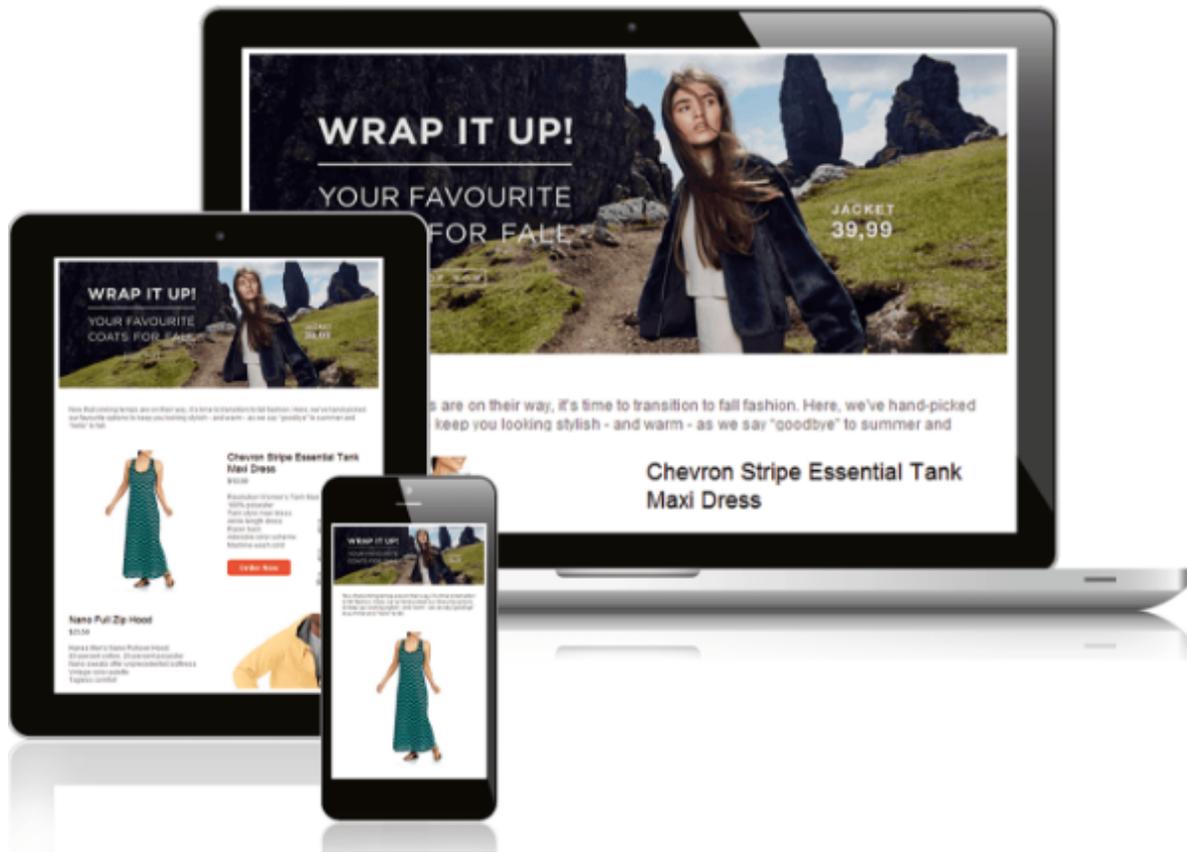
Prerequisites

- If you have not installed Mobile Fusion or are not currently using the Template Kit, contact **customer support** to get Mobile Fusion with the Template kit.
- **Template Kit** describes paragraphs, setup and configuration of the Template Kit, including mobile options.
- **Mobile Fusion** describes design options for the mobile layout of newsletters.

What does the Template Kit with Mobile Fusion offer?

- **Enable or disable mobile version**. If you enable the mobile version, Episerver Campaign automatically generates a version of your mailing optimized for mobile devices; this increases the size of each emailing. See **General settings**.
- **Place the sidebar above/below the main body**. In each paragraph, you can indicate whether to display the sidebar (if present) before or after the main body. See **Grouping paragraphs**.
- **Hide/display paragraphs in the mobile version**. You can indicate, by paragraph, whether to integrate that paragraph into the mobile version. You can also indicate if a paragraph should appear in the mobile version only. See **Content paragraphs**.
- **Set paragraph width in the mobile version**. You can set the width of each paragraph (in %) for mobile display. See **Content paragraphs**.
- **Set the width of paragraph separation in the mobile version**. You can set the width of the paragraph separators (in %) in the general settings for the template. See **General settings**.

Creating mobile versions

1. Create a click profile for the mobile version.

   You can also specify a **click profile** for the mobile version to later evaluate how many recipients clicked it. Create a click profile and select this profile by accessing the **Mobile** tab of the template's general settings > **Click profile** drop-down list.

   > Tip: Landing pages
   >
   > Mobile Fusion also automatically creates mobile versions of landing pages and SWYN pages. The mobile versions of landing pages can also be adapted using the settings described here.

2. Create the desktop version first.

   Before creating a mobile version of a mail, create the desktop version. The default settings for Mobile Fusion were selected for the template kit so that content paragraphs are automatically copied to the mobile version. The sidebar is displayed beneath the main content area; the table of contents is hidden. You can change default settings later.

3. Hide content that should not appear in the mobile version.

   You can enable individual paragraphs for the mobile version. By default, this option is already active for paragraphs, except for the table of contents. To make your mobile newsletter more compact, remove selected paragraphs from the mobile version by removing the **Show in mobile version** check mark.

> **Note:** Do not hide main elements such as the header, footer or editorial, to ensure that the mobile newsletter remains complete.

4. Create alternative paragraphs for the mobile version.

Some content paragraphs may not display correctly or as desired in the mobile version, because the images look awkward or the paragraph has too much text. To add these paragraphs to the mobile version, create two variants—one for desktop viewing and one for mobile viewing. Deactivate the unused view in the settings of both paragraphs.

> **Note:** Only use this option if adjustments to the mobile layout did not result in desired effect. Also, make sure that only one paragraph version appears in the newsletter.

5. Add paragraphs to be displayed in the mobile version only.

To send information only to recipients with mobile devices, add a paragraph at the corresponding position and hide this paragraph in the desktop version by clearing the **Show in desktop version** check box.

> **Note:** Do not hide important content in the desktop version.

6. Position the sidebar.

In the mobile version, the sidebar of a structuring paragraph is displayed above or beneath the main content area for display purposes. This causes the arrangement of elements to shift.

If you insert a table of contents or the newest messages into the sidebar, display the sidebar above the main area or to hide the table of contents in the mobile version. Test to see whether the content of the mobile version is displayed in the correct order.

When using multiple structuring paragraphs in a single mail, you can configure this setting separately for every structuring paragraph.

7. Adjust the paragraph width for the mobile version.

You can create a multi-column layout by specifying a percentage width for content paragraphs in the mobile version. This setting only takes effect if you adjust the width in two consecutive paragraphs so that you get 100% width. You can use this option to force an image to be displayed next to a specific text.

Use a paragraph with an image and another paragraph with a text for this purpose. Then, specify 30% width for the image paragraph and 70% width for the text paragraph. Only use this option for short texts and simple images or graphics, as multi-column layouts reduce the visual quality and readability for mobile viewers.

Tips for optimizing the mobile version

- **Optimize the general settings of the template.** You can select spacings, borders, colors and other configurations. Most settings, except the newsletter's width and outer edge, are copied to the mobile version. You can also change the appearance of the mobile version using these settings.
- **Test the newsletter using Outlook.** The HTML and mobile preview shows a simulated view of the mail in email programs and on mobile devices. The actual view varies depending on software and hardware. Views provided by Microsoft Outlook 2007 or 2010 are a good indicator for the correct display of the newsletter. If Outlook displays correctly without errors, it is likely that other programs and web mailers also display the mail as intended.
- **Change to the mobile view in editing mode.** You can change between the desktop and mobile view by making the editing window in Episerver Campaign smaller and decreasing the width using the cursor. When the window width is less than 600 pixels, the view changes to the mobile view.
- The mobile version may not display uniformly in all email applications and can deviate from the preview layout or the testing emails.

Tips and possible sources of error

Desktop version

The desktop version of this newsletter is the basis for the mobile version. If the mobile version is activated, paragraphs are copied into the mobile version by default.

Mobile version 1

This mobile version is created from the desktop version with minor adjustments.

Mobile version 2

In this adjusted mobile version, a table of contents is displayed. The two small paragraphs after the editorial were positioned next to each other, both with a width of 50%.
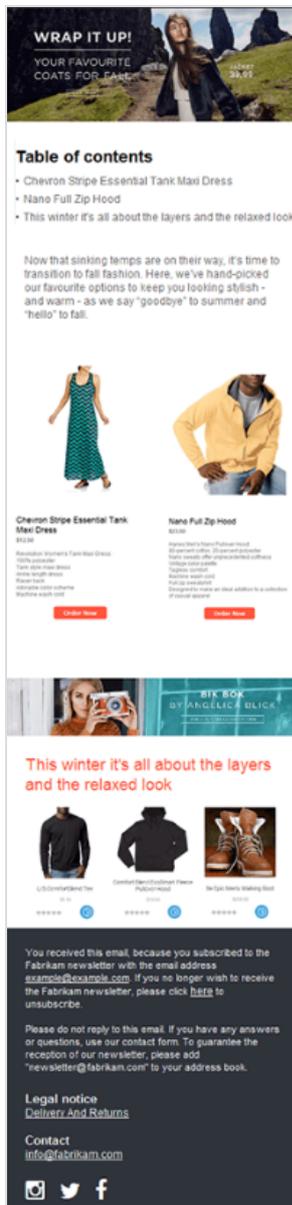
Mobile version with errors

This mobile version contains common errors. You should check the mobile view of your newsletter and, if possible, test it using mobile devices to avoid such mistakes.

The width of this paragraph is set to 50%. But the width of the following paragraph was unchanged. So, the first paragraph only occupies half of the available width and creates a gap. For both paragraphs to be adjacent, adjust the width of the following paragraph so that both add up to 100%.

Attachments

The attachments function provides an overview of attachments and images saved in the Episerver Campaign content database, and also lets you edit those files.

To access the content overview, open the start menu > **Campaigns** > **Attachments**.

You can perform the following actions:

- New

  Click **New** to import an [image] or [attachment].

- Edit

  1. In the overview, click an image or attachment.
  2. Click **Edit**. The **Edit Image**/**Edit Attachment** window opens.
  3. Enter a new file name for the image or a new file name and a description for the attachment.

     > **Tip:** The name you apply to the file should match the original file, so as not to confuse the mailing recipient.

     > **Note:** Do not use uppercase, spaces, umlauts, or special characters, and add the file extension. Otherwise, the attachment does not load correctly. Example: *flowers_for_you.pdf*.

  4. If you want to change the file, that is, use another file (by uploading a new file or specifying another URL), click **Previous** and make the change.
  5. Click **Save**.

- Delete

  1. In the overview, click an image or attachment.
  2. Click **Delete**.

- Deselect

  Click **Deselect** to deselect the image or attachment.

Categories

Click the **Image** tab to display images, or the **Attachment** tab to display attachments.

Images

The Images overview displays the following information:

- **Name**. The file name.
- **URL**. Where the image is stored. If it is physically uploaded to Episerver Campaign, the URL is an **internal** URL (http://img.example.com/...). If you selected **Use URL**, the file's original URL is shown.
- **Width/Height**. The image's dimensions (in pixels).
- **Location**. Indicates whether the image is stored on Episerver Campaign (server) or located externally.
- **Preview**. Shows a preview of the image (scaled down in most cases).

Attachments

The **Attachment** overview displays the following information:

- **Description**. The attachment description.
- **File name**. The file name.
- **URL**. If you selected **Use URL** while importing the attachment, the file address appears. If the file was physically imported into Episerver Campaign, this field is empty.
- **Location**. Indicates if the file is stored on the Episerver Campaign (server) or located externally.
- **Type**. The file format (PDF, DOC and so on). This is the original file format as recognized by Episerver Campaign when the file was added, not the format you applied while naming it.

  > **Tip:** The type you apply to the file should match the original file, so as not to confuse the mailing recipient.

- **Size**. The file size in bytes. Use discretion with the file size, so recipients are not annoyed by large attachments.

Adding an image

This window lets you import images into Episerver Campaign. These are available when new mailings are created.

> **Note:** The image's file format must be .gif, .jpg, .jpeg or .png.

1. Open the start menu > **Campaigns** > **Attachments**.
2. Open the **Image** tab and click **New**.

3. Select one of the following options:

- **Upload from hard drive**. Upload an image from your computer to Episerver Campaign. The image is still available even if your local version no longer exists.
- **Use URL**. The URL defines image's location. The image is not physically imported into Episerver Campaign. Mailings include only a link to the image.

  Only choose this option if you are sure the image is available at the address.

4. Click **Next**.

- If you selected **Upload from hard drive**, click **Browse** and select a file from your computer.
- If you selected **Use URL**, enter the web address where the file can be found, beginning with `http://`.

5. Click **Next**.

   A progress bar indicates that the file is uploaded.

6. In the **Image name** box, enter a name that helps you recognize the image when creating a mailing or in the content overview.

7. Click **Save**.

Adding an attachment

This window lets you import any files into Episerver Campaign. These are later available when new mailings are created.

1. Open the start menu > **Campaigns** > **Attachments**.
2. Open the **Attachment** tab and click **New**.
3. Select one of the following options:

- **Upload from hard drive**. Upload a file from your computer to Episerver Campaign. The file is available even if your local version no longer exists.
- **Use URL**. The URL defines the file's location. The file is not physically imported into Episerver Campaign. Mailings include only a link to the file.

  Only choose this option if you are sure the file is available at the address.

4. Click **Next**.

- If you selected **Upload from hard drive**, click **Browse…** and select the desired file from your computer.
- If you selected **Use URL**, enter the web address where the file can be found, beginning with http://.

5. Click **Next**.

6. In the **File name** box, enter a name that helps you recognize the file when creating a mailing or in the content overview. Maintain the file extension (.pdf or .doc) so recipients recognize the file type.

7. In the **Description** box, enter a file description.

> **Tip:** The description is used internally and is not part of the mailing.

8. Click **Save**.

Sending personalized attachments

Personalized attachments let you include attachments to particular recipients when sending transactional mails. For example, you can send invoices or order confirmations.

Before sending, transmit the attachments to Episerver Campaign via **HTTP API**.

Prefix or suffix subject line

> **Note:** Contact customer support to activate this feature.

This add-on automatically adds a prefix or suffix to the subject line of any mailing. For instance, the suffix "TEST" may be added to each test email subject line.

Uploading files

> **Note:** Contact customer support to activate this feature.

Upload a file (such as a CSV file) manually into your Episerver Campaign client. This feature is an alternative to the automatic file exchange via **FTP API**, in cases where the automatic exchange is not possible.

The uploaded file can contain any content and is processed internally according to the file name and the processes and jobs associated with this file name. For example, upload product data if you use a content interface and update product details manually.

Updating mailing content prior to dispatch

> **Note:** Contact customer support to activate this feature.

Days may pass between a mailing's creation date and its dispatch date. This delay can cause content to be out-of-date, such as a product that is no longer available.

This add-on verifies the imported content in the mailing when it was created. Product information is validated with the help of a unique product ID.

Also, if a product is not available at dispatch, or if some information is incorrect, the add-on pauses sending.

> **Note:** This add-on requires a content interface.

Publish mailing

> **Note:** Contact customer support to activate this feature.

This add-on publishes a mailing or parts of a mailing into another client or template. It is a useful tool for reusing content from an existing mailing in another context or client.

Video emails

Incorporating videos into a mailing is a great way to get the recipient's attention and surprise them with your creativity. Videos are better than both text and still images at showing a recipient what he wants to know, in very little time and without requiring a word. Videos convey the value of your products much better.

For example, using a 360 degree view, you can demonstrate the features and design of a new product. Videos are also a great tool for obtaining higher response rates and guiding recipients to specific landing pages.

Video email tips

- An email teaser should be no longer than 20 seconds.
- Landing page videos should be no longer than 60 seconds.
- Rapid intercutting between images attracts greater attention.
- Use animation in intros, animate info graphics and transitions.
- Place a call-to-action at the end of a video.

Tools for incorporating videos into emails

Note: The Flash format is not a suitable option for videos in emails, because most email programs block Flash applications for security reasons. However, there are other ways to incorporate moving images into emails.

Animated GIF

This is the best format for showing a video directly in an email, because many email programs can play GIFs without difficulty. Compared to other formats, the quality of animated GIFs is limited and they do not allow audio playback.

A comparison of advantages and disadvantages shows that animated GIFs can be used primarily as teasers lasting only a few seconds. To incorporate full videos, add a playback button to animated GIFs, linked to a landing page. The email should explain that there is no audio playback.

Advantages	Disadvantages
- Videos run directly in an email - Broadly supported by current email programs and web mailers - Unsupported email programs (such as Microsoft Outlook) display the first frame as a fixed image (fallback)	- No audio - Limited quality (in terms of color intensity, image frequency) - No compression (i.e. file size increases proportionally with frame rate, each individual image is stored) - No control elements

Note: The width of the GIF must be less or equal to the width of the content paragraph in your mailing. Example: If you are adding a GIF with a width of 650 pixels to a

> Text/Image paragraph with a content width of 600 pixels, the GIF will be compressed and lose its animation.

Landing page

Rather than integrating a video into an email, insert a screenshot from the video (such as the opening image) into a newsletter, along with a playback button that links to a landing page containing the video. You can couple this variant with an animated GIF. The recipient sees a moving image in the email with a teaser lasting several seconds. If he/she clicks on it, the actual video starts running in the landing page.

Advantages	Disadvantages
- Simplest way of linking videos and emails - Supported by current formats (Flash, MP4, HTML5) - Practically unlimited video length and quality - Video and audio - Control elements may be used - Does not require videos to be adjusted to your newsletter's specific format	- Large videos or high click rates require a hosting service - This sort of "fake player" can irritate recipients, who may expect the video to run in the email

To accommodate recipients who set their email programs to suppress images, include a text link to the video in addition to the fake player. To avoid irritation caused when the video begins running in the browser rather than in the email, include a note indicating that the video will run externally.

YouTube videos

Several email programs (Google Mail, Outlook, Yahoo) allow videos hosted on YouTube to be played back directly in an email.

Advantages	Disadvantages
- Videos are hosted on a widely used platform - Supported by many email programs (playback in the email)	- Video URLs may not be substituted with tracking URLs, to ensure reliable identification - Identified URLs are extracted; does not allow incorporating the player into email

Videos recognized by email programs are displayed across or at the bottom of the body of an email. If the recipient clicks the link, the video generally starts running in a layer (Lightbox).

HTML5 video

Mobile devices in particular, like iPhones and iPads, run videos in their email programs.

Advantages	Disadvantages
• Allows embedding of high-quality videos. • Audio track. • Displays control elements.	• Not supported by many email programs. • Only useful as a supplement in combination with other options.

HTML5 videos can be combined with animated GIFs or a landing page to enable recipients to play back videos. HTML5 video tags and an image tag with an animated GIF or fake player are incorporated into the email source code. The relevant variant is then delivered to the recipient, according to the type of email program he/she uses. Insert the HTML code snippet directly into the email, for example into the source code paragraph of the Template Kit.

Testing and evaluation – Finding the right technical implementation

To give your video email strategy the greatest opportunity for success, you can test how well each integration method works by applying split tests to a representative sampling of your recipients. This is an easy way to determine the best approach for embedding videos and which offers the highest conversion rates.

The chart below shows a split test with results for the variants described above.

Video embedding	Split A	Split B	Split C
Animated GIF and landing page	✓	✓ *	✓ *
Landing page with embedded video	✓	✗	✗
HTML5 video	✗	✓	✗
Youtube video	✗	✗	✓

Note: The animated GIF in Split B and Split C should be included as a fallback option;

recipients who cannot display the embedding variant used only see an animated GIF.

Reporting

Evaluating clicks on video links is easy using conventional tracking. Depending on the technique being used, you also can collect data on playback time and playback rate. At minimum, measure conversion and click-through rates to evaluate the effectiveness of your videos. In particular, assess the following steps/actions:

- Recipient clicked on the landing page in the newsletter
- Recipient ran video (web analysis accessibility required)
- Time spent on landing page (web analysis accessibility required)

To assess how many recipients made a purchase after viewing a video, set up a segment in your web analysis software that links two actions:

1. Recipient made a purchase in the product category.
2. Incoming page (the page clicked on to reach the product page) equals video landing page.

Incorporating videos into a mailing

This example uses a mailing containing an animated GIF teaser that links to a landing page with a full-scale, high-quality video. The animated GIF is created from a short sequence taken from the video and loaded into the mailing as a normal image file. This animated GIF is set in a text/image paragraph, together with the teaser text. The mailing would appear this way in an inbox:

The animated GIF links to a landing page. The full, high-resolution video is integrated into this landing page. The video itself can be hosted on YouTube, Vimeo or another hosting service. These services supply a snippet of code that you insert into the source code:
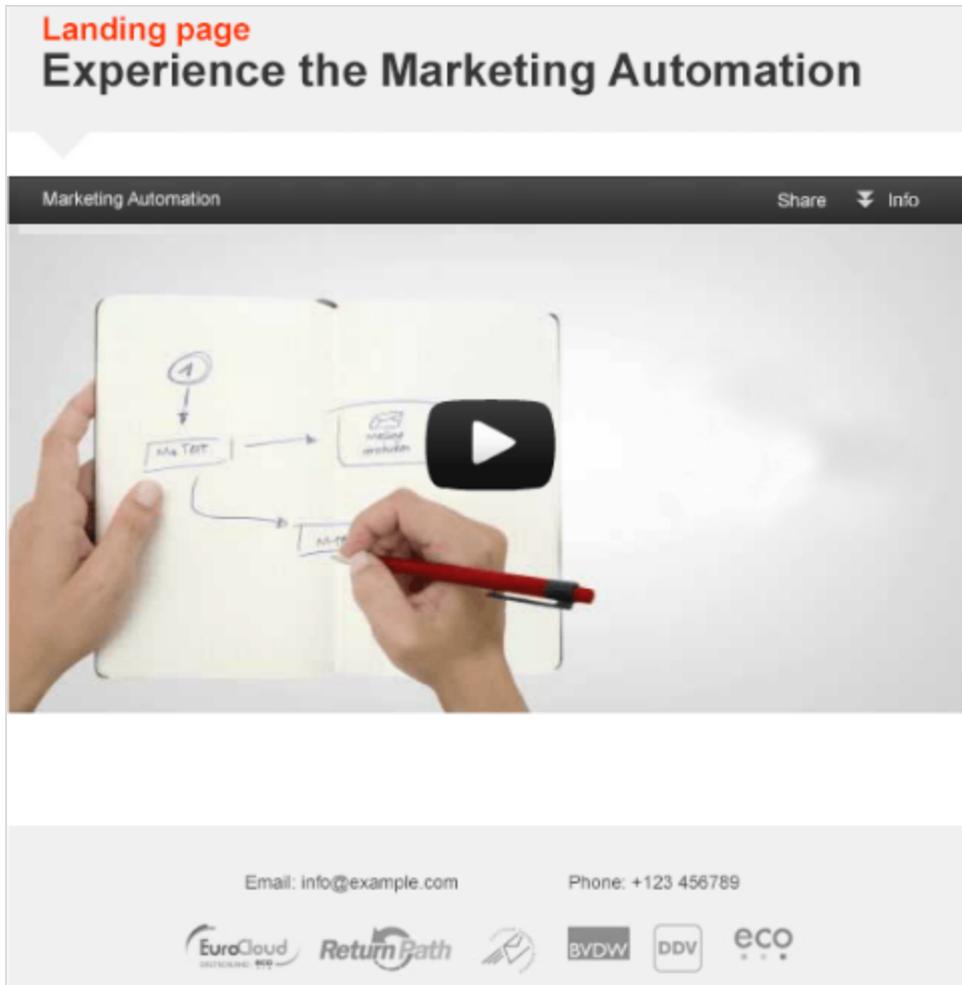
How to create a video mailing with an animated GIF and landing page:

1. The video must be in a standard format. You get best results using the widely available and high-quality MP4 format.

2. Load the video to a hosting service (such as YouTube or Vimeo), if you are not hosting it yourself.

3. Create an animated GIF to use as a teaser. Animated GIFs can be created using standard editing programs like Adobe Photoshop.

   Note: The width of the GIF must be less or equal to the width of the content paragraph in your mailing. Example: If you are adding a GIF with a width of 650 pixels to a Text/Image paragraph with a content width of 600 pixels, the GIF will be compressed and lose its animation.

4. Set up a mailing in the client where you want to insert the teaser.

5. Create a landing page based on this mailing.

6. Switch back to the mailing and insert a text/image paragraph. Upload the animated GIF in the **Image** tab and compose the paragraph in the usual manner.

7. Select the landing page from the list in the **Link** field.

8. If needed, add a note indicating that the video will open in an external browser window.

9. Open the landing page and insert a source code paragraph containing the code snippet that embeds the video. You can get this code snippet from YouTube by going to the video and clicking **Share** and then **Embed**. You can get the code from Screencast by hovering over the video icon and then clicking **Share**.

10. Save and test the mailing.

Recipients

This section shows how to manage active and inactive recipients, create target groups and send personalized content to customer segments.

- **Recipients overview**. Functions for working with recipient datasets.
- **Recipient lists**. Copy, edit and clear recipient lists.
- **Target groups**. Generate, utilize and analyze segments.
- **Opt-in**. Information on the opt-in procedure.
- **Recipient history**. Display mailing progress with individual recipients.
- **Export mailing and performance data**. Export response data as CSV or XML.
- **Click profiles**. Create, edit and assign click profiles.
- **Returned emails**. View bounces and replies.
- **Blacklist overview**. Manage the blacklist.
- **Change email addresses**. Change recipient ID.
- **Export recipients by category**. Export recipients to a CSV file according to category.
- **Importing recipients by category**. Synchronize recipients from external sources with Episerver Campaign.
- **Preference Center**. Link Preference Center to Episerver Campaign.
- Connect for Campaign. An add-on that connects Episerver CMS, Episerver Forms, and Episerver Campaign.

Recipients overview

The recipients overview provides access to functions for working with recipient data sets.

- **Open recipient overview**. Open the start menu and select **Recipients** > **Overview**.
- **Show recipient datasets**. Select a recipient list.
- **Filter selected datasets**. Select a target group from the **Target group** list and click **Apply**.
- **Search**. To search for a recipient or key word within a dataset, enter a search term into the **Free text** search box and click **Apply**.
- **Create recipient**.
  1. Click **Create recipient**. An row of input boxes appears.
  2. Enter data for the new recipient.

    3. Click **Confirm**. The list is re-sorted. See also [Add element](#).

- **Edit recipient**.

  1. Select a recipient from the list and click **Edit recipient**. Editable fields change to input boxes.
  2. Click **Submit**.

- **Delete recipient**.

  1. From the list, select a recipient and click **Delete recipient**.
  2. Confirm.

  > **Note:** Only use **Delete recipient** to remove a recipient whose email address does not exist. Recipients who should not receive email from you because of a complaint should be added to the blacklist.

- **Blacklist recipient**. See [Blacklist overview](#).

  1. Select a recipient from the list and click **Blacklist recipient**. The **Blacklist recipient** dialog box appears.
  2. Optionally, enter a blacklisting reason, such as, *complaint by telephone*.
  3. Click **Apply**. The recipient is added to the blacklist.

- **Anonymize tracking**.

  > **Note:** Contact [customer support](#) to activate this feature.

  Lets you deactivate personalized click and link tracking for a recipient. If you do, the person who is no longer included in action-based target groups (that is, *has clicked link B in mailing A*), even if they meet the target group's conditions.

  - To deactivate personalized tracking for a recipient, select a recipient and click **Anonymize tracking**.
  - In the dialog box that opens, confirm.

    > **Note:** Personal action-based data is anonymized from the time of activation. Action-based data from the recipient history is not retrospectively anonymized. If you later reactivate personalized tracking, anonymized action data is not restored and assigned to the recipient.

- **Download recipient**. If you have permissions to download recipient lists, you can save recipients in a recipient list or a selected set of recipients to a CSV file by clicking **Save** 💾 at the bottom of the list.

  > Warning: Take care when handling the downloaded data

A recipient list or set of recipients downloaded with this function also contains data for unsubscribed recipients, blocked recipients, and recipients for whom the bounce limit is exceeded. Do not use this dataset for sending messages or mailings from other clients or mailing systems. To export only active recipients in a recipient list, use **Recipient export** instead.

Importing recipients

Import a file that contains recipient data using a CSV file. If the source file is not in this format, or to export recipient data from your local database or CRM first, ask your IT department for assistance. If the source file is a spreadsheet, convert it to CSV with the **Save as** command.

Tip: Test import

Before importing, run a test import to check recipient list data and the correct assignment to a Episerver Campaign recipient list.

To import your recipient data, follow these steps.

Step 1: Start the process

1. Open the start menu > **Recipients** > **Import**.
2. Click **Browse** and select the file with the recipient data.
3. Click **Next**. The file is uploaded to the Episerver server.

Step 2: Select a recipient list

1. In the **Select recipient list** area, click the list to which you want to import new recipients.
2. In the **File options** area, specify the characters your CSV file uses to separate the entries.
   - **Separator**. Select the character (semicolon, comma, tabulator and so on) that separates data fields on the lines of the uploaded file.
   - **Escape character**. Some database programs use a single quote (') or double quote (") around each data field when exporting. Select which one is used in the uploaded file.
3. Click **Next**.

> **Tip:** You cannot add new recipient lists. New recipients are added to an existing list.

Step 3: Set the mapping

You must assign each column of the recipient list to a corresponding column in the imported recipient list. The left column of the **Row Mapping** tab lists fields of the Episerver Campaign recipient list into which you are importing. The right column contains column headers from the imported list.

1. Assign fields according to their content. Typically, Episerver Campaign suggests the correct assignment (such as matching *first name* with *first name*). However, if *first name* in the recipient lists corresponds to *name* in the file, you must select the correct assignment.

2. If you prefer to import data fields selectively (for example, only recipients' last names have changed), select the **---** option for fields that should not be changed.

3. Select the **Fixed value** check box to change the pop-up menu to an entry field in which you can enter any text or value. This value or text is then imported into the corresponding field for each record.

   For example, you generate email addresses of newsletter subscribers through your website as well as other sources (cooperation partners and so on). If you import records supplied by a cooperation partner, use the **Origin** field to indicate the partner's name or a corresponding code, so you can track the subscription's origin. You can also evaluate the activity of subscribers from various sources.

   For another example, if your recipient list also contains mobile numbers, enter a country code for these fields during import if the imported numbers do not contain them. The country code is automatically prepended to the telephone number, and the telephone number may be standardized (eliminating the 0 before the area or network code).

4. After making the settings, click **Next**.

Step 4. Set import type and import options

1. In the **Select import type** area, select the import type.

   Depending on the configuration of your client and your user authorization, you may see only some options.

   - **Simple import**. Imports new recipients into your list. Existing records, unsubscribes or blacklisted recipients are skipped.
   - **Import new recipients and update existing records**. Default import type. New recipients are added to the recipient list. Existing records are checked and updated as required. Episerver Campaign identifies recipients by recipient ID, usually email address. If a recipient's email address has changed, he is imported again, becauseEpiserver Campaign does not recognize it as an existing recipient.
   - **Update only**. Does not import new recipients. Only updates existing records as needed. If a recipient's email address changed, the recipient is skipped, because Episerver Campaign does not recognize it.
   - **Clear recipient list before importing**. Overwrite existing recipient list in Episerver Campaign with data from the uploaded file. You should upload your complete address data.

     Overwriting can be practical if recipients can unsubscribe both by clicking in the newsletter and through the call center. In this case, the unsubscribe information must find its way to Episerver Campaign so that these recipients are unsubscribed and receive no further mailings. If your call center deletes a record from your database or CRM software, you can guarantee that this recipient is deleted by selecting **Clear recipient list before importing**.

2. In the **Set import options** area, select one or more of the following import options:
   - **Skip first row**. Often, the uploaded file has field names in the first row. Select to skip the table headers and start importing with the second row.

- **Import unsubscribers.** If this option is displayed, you can import recipients who are marked as unsubscribed in your client. Newly-imported recipients receive mailings right after importing them with this import option.

    > **Note:** Permission is required for recipients. Do not send newsletters to unsubscribed recipients, if no permission (opt-in) exists.

3. Add opt-in processes if you want to import recipients from a source that is not linked to an automatic opt-in process, such as from a telephone campaign. Imported recipients receive a welcome or a confirmation email with an activation link. You can select this option only if the confirmation mailing is set up and edited beforehand.

    > **Note: Only import recipient lists once**
    >
    > If a double opt-in process is selected, imported recipients only appear in the list after they have clicked the activation link in the confirmation email. Episerver Campaign automatically sends this email after the import, if an opt-in process is selected.
    >
    > Only import recipients once, even if they do not appear in the list after the import. Otherwise, a confirmation email is sent each time you carry out an import.

4. Click **Import**. The Import starts and the **Import** tab opens.

Step 5: Import the data

When the import is finished, **Save** ▣ appears next to each category for which records were found. Click
Save ▣ to download those records.

The number of processed records and the import result are listed for each category:

- **Records processed**. Number of processed records.

- **Records added**. Number of newly added records.

- **Records updated**. Number of updated records.

- **Records skipped (error in file)**. The column assignment did not correspond with the selected values in the third step. For example, the *email address* field did not contain a valid email address.

- **Records skipped (error in list)**. Number of skipped records; because they already existed, no changes were found, or you selected the option **Update only** and new records were found in the list.

- **Records skipped (on blacklist)**. Recipients that are blacklisted. Depending on your client hierarchy, there might be several blacklists. A blacklisted recipient might not appear in the blacklist of your client, but be blacklisted on the list of the main client.

- **Records skipped (prior unsubscribes)**. Recipients who previously unsubscribed.

- **Records skipped (prior target group)**. The recipients were not imported because your client or the confirmation email (confirmed or double opt-in) uses target groups that do not match.

- **Duplicates in file**. Recipients only imported once to avoid duplicates in the recipient list.

- **Records already in recipient list**. Recipients already in the recipient list are skipped to avoid duplicates.

- **Defective records**. Episerver Campaign validates email addresses when importing them. For example, an email address contains an @ symbol, a valid domain, and does not contain or invalid characters. Such records are not imported.

Trial import

Use trial import to determine how many recipients in a file are recognized by Episerver Campaign versus how many are new.

1. Open the start menu > **Recipients** > **Trial import**.
2. Proceed as described in **Import**. You get statistics with the number of imported recipients, duplicates, invalid email addresses, and so on.

> **Tip:** Unlike import, no changes are made to a recipient list during a trial import. You can download the analyzed records to filter out duplicates or invalid email addresses. To do so, in the overview, click **Save** next to the corresponding category.

Exporting recipients

> **Note:** You need special user rights to use this function.

You can export recipients by status into a CSV file:

- Active recipients
- Unsubscribed recipients
- Blacklisted recipients
- Recipients that exceeded the bounce limit

To export recipients:

1. Open the start menu > **Recipients** > **Export**.
2. Select the recipients you want to export.
3. Click **Options**.
   - **Active recipients**. Click the recipient list whose recipients you want to export. To export only recipients of a specific media type, select the media type from the **Media Type** drop-down list (available for active recipients only). You can also limit the recipient list by selecting one or more target groups from

the **Target groups** drop-down list.

- **Unsubscribed recipients**. Enter a start and/or an end date.

    - If you do not enter a start or end date, all recipients in the selected status are exported.
    - If you enter only a start date, recipients from that date to the present are exported.
    - If you enter only an end date, recipients from the creation of your client until the entered date are exported.

- **Blacklisted recipients**. Click the recipient list whose recipients you want to export.
- **Recipients that exceeded the bounce limit**. Enter a start and/or an end date.

    - If you do not enter a start or end date, all recipients in the selected status are exported.
    - If you enter only a start date, recipients from that date to the present are exported.
    - If you enter only an end date, recipients from the creation of your client until the entered date are exported.

4. Click **Finish**.

> **Tip:** You can start several exports for different statuses simultaneously, but only one export per status.

Cross-checking recipients

Episerver Campaign identifies the recipients of a mailing and which internal lists are used for this purpose. If you maintain recipient lists outside the Episerver Campaign environment, this information can help keep your lists consistent. Contact **customer support** with questions regarding the operation and configuration of your client.

Episerver Campaign validates recipient data in the following modules and functions:

- Importing recipient lists
- Calculating recipients for a mailing
- Sending out a mailing
- Editing the blacklist

The following lists, managed internally by Episerver Campaign, also impact the validation of recipients for mailing dispatches:

- Unsubscribe list
- Bounce counter

Importing recipient list cross-checks

Duplicates

When you import a recipient list, Episerver Campaign filters out duplicates. Duplicates within imported CSV files are also checked, so only one record per recipient is imported.

> **Tip:** If you select the **Clear recipient list before importing** option, the list is not cross-checked because it is deleted before any data is imported.
>
> If you select the **Import new recipients and update existing records** option, existing records are not treated as duplicates but are overwritten with new values.

Blacklist

Imported records are cross-checked against the blacklist. Blacklist recipients, including those serving as a place-holders, are not imported.

Unsubscribers

Unsubscribers are included on an unsubscriber list, which usually applies to clients (though not inherited). You can create unsubscriber lists based on recipient lists and permanently linked to a recipient list, which do not affect other recipient lists in the same client.

Unsubscribers are not deleted from the database and not imported a second time.

Incorrect data records

During import, Episerver Campaign checks the following email address criteria:

- An address must contain exactly one @ symbol.
- An address's local element (before @) may not begin or end with a dot.
- Two consecutive dots cannot occur
- Blank spaces and the following special characters are not permitted: `( ) [ ] \ ; : , < >`
- An address's domain element (after @) must conform to the [domain name system](#) rules

Imported records must also have fields in the recipient list that match columns in the imported list. Incorrect records are not imported.

Analyzing records that are not imported

After importing a recipient list, you can download the non-imported records as a CSV file for each category described above. Use this file to manage the original list.

Sending mailing cross-checks

When you initiate a mailing, recipients are selected based on the following criteria and algorithms:

- Recipients on a blacklist, unsubscribers, and recipients with a bounce overflow are not contacted.
- Where applicable, target groups and maximum numbers of recipients are determined.
- Email addresses are checked for correctness (see Incorrect data records).

After a mailing is sent out, returned emails are analyzed. Recipient addresses that produce a bounce generate an automatic reply to the return address. The replies are analyzed by Episerver Campaign. Hard and soft bounces are counted separately for each recipient. A recipient who reaches the bounce limit for hard or soft bounces will not be contacted again. These recipients remain on the recipient list but are skipped when mailings are sent out (see Bounces).

Recipients who click the unsubscribe link are placed on the unsubscribe list. These recipients still appear in the recipient list but will not be sent mailings. The unsubscribe list records the email, a time-stamp, and the mailing the recipient received when he/she unsubscribed. These records make it easier to track cancellations – in the event of a complaint, for instance.

Cross-checking bounces

A bounce is generated whenever an email fails to reach a recipient's email server or mailbox. It informs the sender that the email could not be delivered.

Soft bounces

A soft bounce is generated when a mailbox is temporarily unavailable, such as when a mailbox is full and unable to accept more email until the user deletes some. Soft bounces seldom occur, because memory is usually large enough to handle a large number of emails.

Hard bounces

A hard bounce is generated when a server address or mailbox does not exist due to a technical problem (such as a server is down). A hard bounce is also generated if a mailbox no longer exists, which may have several reasons:

- The email address is entered incorrectly (even though syntactically correct).
- The user canceled the email account.

Bounce counter and bounce limits

Bounce limits for soft and hard bounces are set when configuring the client. The standard limit is three hard bounces or five soft bounces. Once reaching this limit, the recipient receives no more mailings. Bounces are counted across clients for each recipient.

- **How can I see how many bounces a recipient has generated?**

  You cannot view bounces from the Episerver Campaign user interface but you can retrieve the number of bounces via the Episerver Campaign REST API. If you use the SOAP API, the getBounceCounter method also shows the number of bounces.

- **Can I view recipients who have generated a bounce overflow?**

  You cannot view bounced out recipients from the Episerver Campaign user interface. However, you can use the Download bounce overflows feature to download bounced out recipients as a CSV file. Contact customer support for assistance.

  You can also use the Episerver Campaign REST API to get information whether a recipient has exceeded the bounce limit. If you use the SOAP API, the isBounceCounterThresholdExeeded method also shows if a recipient has exceeded the bounce limit.

- **Can I reset the number of bounces generated by the recipient?**

  You cannot reset a recipient's bounce count from the Episerver Campaign user interface. Contact customer support to reset the bounce count. But you can reset the bounce count via the Episerver Campaign REST API, or if you use the SOAP API, the resetBounceCounter method also resets the bounce count to 0.

- **If an email account cannot be contacted, does it matter whether and how often I send mailings to it? It may be reactivated at some point.**

  That may be true in theory. In practice, however, mailings to unavailable or non-existent emails are saved and analyzed by the internet service provider. If a sender sends too many emails to unavailable addresses, the provider places the sender on a blacklist and treat those emails as spam. So, it is better to stop mailings to a recipient who generates three/five bounces.

Cross-checking blacklists

Blacklists contain recipients who should not be contacted, including recipients who have submitted complaints, but also known spam traps and postmaster accounts which are standard for every email account.

Blacklist hierarchy and delegation

Depending on the how a client is structured, it can have one or more blacklists. Entries in a blacklist are inherited by sub-clients from main clients. If you lack authorization to access the main client, you cannot view its blacklists. The main client blacklists also apply to the sub-clients.

Placeholders

Blacklists, unlike recipient lists, can use placeholders. For example, you can block a domain. So while a recipient's email address is not specifically on the blacklist, a recipient's domain can block the recipient.

- **Can I define a blacklist for a single recipient list?**

  No. A recipient list applies across clients.

- **Can I view blacklist entries in higher level blacklists?**

  You must have authorization to access a higher level client.

- **Can I prevent a blacklist from being inherited by sub-clients or define exceptions?**

  No. Blacklist entries are inherited by sub-clients. You cannot circumvent this type of inheritance. Also, you cannot define exceptions for blacklist entries.

Cross-checking unsubscribe lists

Recipients who unsubscribe from a mailing by using an unsubscribe link or de-registration form are marked as unsubscribed. However, they are remain on the recipient list. When a mailing is sent, these recipients are filtered out.

- **Can I view the unsubscribe list in my client?**

  You may not view unsubscribe lists using the Episerver Campaign user interface. There are several ways to retrieve unsubscribers.

  1. Using the **Download unsubscribers** feature, download an unsubscriber list as a CSV file through the user interface.
  2. If you are using the **REST API**, use the **GET method** to retrieve information about all unsubscribes.
  3. If you are using the **SOAP API**, use the **contains** and **containsAll** methods to query whether one or more recipients are on an unsubscriber list.

- **Can I configure an unsubscribe list so that it only applies to one recipient list?**

  Yes. You can set up an unsubscribe list based on a recipient list. Whether it makes sense to do so depends on the recipient list and how a client is structured. Contact **customer support** for assistance.

- Can I use the Episerver Campaign user interface to place a recipient on the unsubscribe list or remove him/her from it?

  No. Only the recipient can complete the unsubscribe process. To rescind an unsubscription, the recipient must re-register (by using the opt-in option, depending on the configuration).

- Can I unsubscribe a recipient by deleting him/her from the recipient list?

  If you deleted from the recipient list, the recipient no longer receives mailings from this list. If appearing in multiple lists, however, the recipient will continue to receive mailings via the lists from which the recipient is not deleted.

  > **Note:** You should not delete a recipient from the list because the recipient's de-registration is not recorded, so the recipient can be added to a recipient list again. This can result in a complaint if the recipient continues to receive mailings after unsubscribing.

- I manage my recipient list myself and import it to Episerver Campaign prior to each mailing. What should I keep in mind when doing this?

  Make sure that you import only active recipients into the recipient list. Import unsubscribers into the unsubscribe list so that the cross check can take place before dispatch.

  You also can use specially designed jobs/services to import unsubscriber lists or multiple lists. These jobs/services are not accessible via the Episerver Campaign user interface. The lists are transferred onto the Episerver Campaign server per SFTP and automatically imported to the client:

    - **Importing an unsubscribe list**. Import your local unsubscribe list to the unsubscribe list on your client.
    - **Importing recipients including unsubscribers**. Import an individual recipient list that contains active recipients for a variety of recipient lists and unsubscribers. The status of a recipient, or the list to which it is being imported, must be entered in a separate recipient list column to keep your lists consistent.

  > **Tip:** Contact customer support for configuration of jobs/services. Imported data must have a defined name and be stored in a defined directory per SFTP.

Recipient lists

> **Note:** To create a new recipient list or change properties and data fields of existing recipient lists, contact customer support.

The **Recipient list** menu provides functions to edit, empty, or copy recipient lists. The overview area shows recipient lists for your client, and the number of recipients in each list.

Copying a recipient list

Creates a new recipient list that contains the same data fields as the selected source list. Only the list structure is copied, not the entries.

Editing a recipient list

Change the name or description of a list. You can also set any recipient list as a test list. Use test lists only for sending test emails, not regular sending.

> **Note:** Do not use real customer data for test lists, but use your own data or that of your co-workers and superiors, for example.

Clearing a recipient list

Deletes entries from a recipient list. The list itself is not deleted and can be used again.

> **Tip:** To delete and/or unsubscribe multiple recipients from multiple recipient lists, use Cleanup.

Displaying recipient list details

If **Separate data storage** is activated in your client, you can use **Details** to access the settings to hide or display recipient list fields with personal data for users of your client.

1. Click **Details**. The **Show recipient list details** opens.
2. In the list, select the recipient list field you want to hide or display for users of your client.
3. Click **Edit**. In the **Shown data** column, a drop-down list opens.
4. In the drop-down list, select:
   - **Master data**. Display the recipient list field only to users with appropriate permissions.
   - **Properties**. Display the recipient list field to all users.
5. Click **Submit**.
6. If necessary, repeat these steps for additional recipient list fields.
7. To save the changes for recipient lists, click **Apply changes to all lists**. To save the changes only for the selected recipient list, click **Apply changes**.

> **Tip: Separate data storage** supports three user permissions for displaying personal recipient data:
>
> - View **Properties** fields only
> - View **Master data** fields and **Properties** field separately (so a user cannot associate properties with a recipient)
> - View **Master data** and **Properties** fields

For details about **Separate data storage** and individual user permissions, contact **customer support**.

Recipient list data fields

Every recipient list contains an unlimited number of data fields. One data field is reserved for the recipient ID, usually the email address. You cannot edit the recipient ID field. Instead of the email address, you can use any other ID, such as a customer ID.

Recipient list data types

Each data field can store a certain data type, which is selected when the recipient list is created. According to the data type, you can perform mathematical and/or logical operations with the value of a data field. For example:

- **Numbered fields**. Numbers can be integers (32-bit/64-bit) or floating decimals. Compare the value of a field with a given value (equals/is less than/is greater than).
- **Date fields**. Compares date and time (is older than/is younger than/is prior a given time/date/is past a given time/date/is exactly ... old).
- **Boolean fields**. Perform *is true* or *is false* operations.
- **String fields**. Congruity or incongruity of strings and characters (*begins with*, *end with*, *does not begin with*, *does not end with*, *contains*, *does not contain*).

The following data types and range of values are permitted for recipient list data fields:

Data type	Range	Example
Boolean	true/false	Registration via website, interested in promotional newsletters
Date	date	Registration date. Supported date formats:

Data type	Range	Example		
		Note: Programming interfaces (APIs) only support date formats according to ISO 8601.		
		Date format	**Description**	**Example**
		yyyy-MM-dd	Date with separator	2017-05-07
		yyyy-MM-dd HH:mm:ss	Date and time	2017-05-23 09:50:04
		yyyy-MM-dd'T'HH:mm:ss	Date and time according to ISO 8601	2017-05-23T09:50:04
		yyyy-MM-dd'T'HH:mm:ss,SSS	Date and time with milliseconds	2017-05-24T08:03:59,123
		yyyy-MM-dd'T'HH:mm:ssXXX	Date and time with time zone offset	2017-05-07T12:18:54+02:00 2017-05-07T08:18:54-02:00
Float	single-precision 32-bit IEEE 754 floating point	Conversion volume, customer score		
Integer	32-bit-signed; -2,147,483,648 - 2,147,483,647	Age		

Data type	Range	Example
Long	64-bit-signed; -9,223,372,036,854,775,808 - 9,223,372,036,854,775,807	Customer ID
String	unicode text up to 256 characters	Email address, first name, last name, city, postal code
Text	up to 64,000 characters	Email address, first name, last name, city, postal code

Cleaning up recipient lists

Cleanup lets you automatically delete and/or unsubscribe recipients from recipient lists. You upload a CSV file with the recipients you want to delete or unsubscribe, then select the lists.

> **Note:** To delete and/or unsubscribe recipients, you must have the appropriate rights.

1. Create a CSV file containing the IDs of the recipients you want to delete or unsubscribe.

   > **Tip:** Episerver Campaign identifies recipients by recipient ID, usually email address.

2. Open the start menu > **Recipients** > **Cleanup**.
3. In the **Upload file** tab, click **Browse…**.
4. Select the CSV file created in step 1 and click **Preview**. The file is uploaded to the Episerver server. The **Preview** tab shows the uploaded recipients.

   > **Note:** The **Recipient** column must contain recipient IDs. On import, only this column is considered.

5. If email addresses do not display correctly, change the **Character encoding** option.
6. If the first line of the CSV file contains column names, in the **Skip first row** list, select **Yes**.

7. Click **Refresh preview** to check your settings.

> **Tip:** To only unsubscribe recipients, go to step 10. To only delete the recipients, go to step 12.

8. Click **Delete**.
9. In the **Delete recipients** area, select the **Delete recipients** check box. In the **Recipient lists** area, select one or more recipient lists from which you want to delete the recipients.
10. Click **Unsubscribe**.
11. In the **Unsubscribe recipients** area, select the **Unsubscribe recipients from all recipient lists** check box to unsubscribe recipients from recipient lists.
12. Click **Summary**. In the **Summary** tab, all actions to be performed are displayed.
13. To make changes, click the corresponding tab and perform the appropriate steps.
14. Click **Finished**. The recipients are deleted and/or unsubscribed according to your settings. You receive a notification email to your email address once the process is complete.

> **Note:** While the process is running, you cannot run a new one.

> **Tip:** You may need to export the data from your recipient database, CRM application or similar. If the source file is not a CSV file or if you want to export the recipient data from your local database or CRM first, ask your IT department for assistance. If the source file is a spreadsheet file, you can convert it into a CSV file. Open the file with your spreadsheet application (for example Microsoft Excel), select **Save as** -> **.csv file** and save it to your local hard drive.

Target groups

A target group is a subset of recipients defined by specific rules and conditions. Each target group may contain several rules and conditions and a logic relation between them. Use target groups to send a mailing to a predefined group of recipients (such as *recipients in the US*) or to create dynamic content and subject lines. Dynamic paragraphs let you show, for example, different items to male and female recipients. You can use dynamic subject lines to create specific attention even before a recipient has opened the mailing.

You can define a target group using the following classes of conditions:

- **Action-based conditions**. Criteria based on an action or event (such as *click*, *open*) that a recipient has performed. Those conditions apply only after a mailing is sent. An example for an action is: *Recipient has*

received a specific mailing and has clicked on a specific link in it.

- **Recipient list-based conditions**. Determines whether recipients are contained in specific recipient lists.
- **Recipient data-based conditions**. Criteria based on any field of the recipient list (such as *City* or *Interest*).
- **Episerver Campaign-based conditions**. Determines whether recipients are currently passing through or already passed through Marketing Automation campaigns.
- **Target group-based conditions**. Determines whether recipients are contained in another target group.

If your client is configured for post-click tracking, you can track actions that are made on your website. For example, *select recipients who have bought a certain product* from your shop or *have spent a certain amount* in your shop. To configure a target group with post-clicks, select **Actions** from the first drop-down list and then **has created one or more post-clicks**.

Example: Define a target group that contains *male recipients in the US*. You may now vary this target group by adding further rules, such as *recipients who clicked on a specific link in the last mailing they received*. Use this target group to send a special offer or a promotional email to selected recipients. If you apply the target group to the whole mailing, only the target group receives the mailing. If you apply it to a paragraph, it is shown only to these recipients, while the others receive the regular mailing.

> **Note**: If you want to see the matches of a target group in the [recipients overview](#) and the selected target group contains user-based data (for example, user actions), you get an error after clicking **Apply**. Due to data privacy reasons, you are not allowed to analyze a single user's data. When using this target group to send a mailing or to create dynamic content, it will work properly, though.

> **Tip**: You can use Insight segments as target groups in Episerver Campaign mailings. See Creating a marketing segment.

Managing target groups

To manage target groups, open the start menu > **Recipients** > **Target groups**. Existing target groups appears. If you click a target group, its definition appears in the bottom of the window. Every target group definition is made up of one or more rules. For example, *The email address contains "@example.com"* or *The first name is "Mark"*.

You can organize target groups in [folders](#).

Creating a target group

1. Click **Create**.
2. In the **Client** drop-down list, select the client for which you want to create a target group.

3. In the **Target group definition** area, define the rules and conditions for the target group by clicking **+** and performing steps described in [Defining a target group](#).

4. Optionally, you can execute a target group [analysis.](#)

5. Click **Properties**.

6. Enter a name and an optional description for the new target group.

7. Click **Create**.

Copying a target group

1. Select a target group you want to copy and click **Copy**.

2. In the **Client** drop-down list, select the client to which you want to copy the target group.

3. In the **Target group definition** area, define the rules and conditions for the target group by clicking **+** and performing steps described in [Defining a target group](#).

4. Optionally, you can execute a target group [analysis](#).

5. Click **Properties**.

6. Enter a name and an optional description for the new target group.

7. Click **Create copy**.

> **Note: Recipient field does not exist in target client**
>
> If the target group you want to copy contains a recipient field based on a rule that uses a recipient field that does not exist in the recipient lists of the target client, the respective name of the field is shown like this: *???Name???*. You can still copy the target group. Next, open the target client and select the copied target group. Change the field name by selecting a field from the drop-down list and save the target group.

Editing a target group

1. Select a target group you want to edit and click **Edit**. The **Edit target group** window opens.

2. In the **Target group definition** area, edit the rules and conditions or add new ones for the target group. To edit a rule, click it and perform steps described in [Defining a target group](#).

3. Optionally, you can now execute a target group [analysis](#).

4. Click **Properties**.

5. You can change the name or description of the target group, or add and edit rules and conditions.

6. Click **Save**.

Using Episerver Insight segments as target group

If you have Episerver Insight on your website, you can use segments from Insight as target groups for your campaigns. See Creating a marketing segment for an introduction on how to create a segment based on website visitor profiles. See **Create and edit campaign** and **Smart Campaigns nodes** how to work with Insight segments for campaigns.

Defining a target group

When creating a new target group, the **Target group definition** area is empty, except for a plus icon **+**.

1. Click **Add +** and, in the very left drop-down list, select whether you want to create a negative condition. Select **Not** if the criteria you define for it is false. To create a positive condition, leave this first drop-down field blank.

   > **Note:** Sometimes you want to formulate rules in a negative fashion. Select the **not** option from the first drop-down list while creating a rule. For example, to find recipients not from Berlin, the rule would be: *not Recipient list field "Location" is equal to "Berlin"*.

2. In the next drop-down list, select whether you want to create an **action-based**, **campaign-based**, **recipient list-based**, **recipient data-based** or **target group-based** condition.

As another option, you can use the parentheses to hierarchically handle more complex definitions. Rules within parentheses are applied first and then the rules in the second level and so on. Use AND or OR logic relations between two conditions. To change the type of relation, click it. Due to correctness and logical unambiguousness, target groups without parentheses can only contain one type of logic relation. Thus, if you click a relation, relations between the rules are changed. If you want to use different types of logic relations, use parentheses as in the following example.

Example

You are looking for recipients located in *Berlin* or *Hamburg* and with email accounts at *example.com*.

(Recipient location equals Berlin OR Recipient location equals Hamburg) AND email address contains @example.com

The parentheses makeEpiserver Campaign select recipients from *Berlin* or *Hamburg* first. Then out of this subset, recipients with an *example.com* email account are selected.

> **Tip:** Use drag-and-drop to sort rules and conditions or put them into parentheses. If you hover over a rule, a context menu appears on the right side. Click **Add +** to add a

new condition at a specific position; click **Remove —** to delete a condition. The **Copy** symbol creates a copy of a condition.

Defining a target group based on recipient data conditions

If you selected **Recipient list field** in the second drop-down list, the following drop-down list shows fields from your recipient list. Select the field you want to query, such as **ZIP code**.

Depending on the type of field, in the next step you can select an operator. The operator compares the content of the selected recipient field with a targeted value. The following table shows all available operators. You complete other rules by entering a matching value in the last field.

Operator	Data field type
equals	String, numeric field, date field, boolean
does not equal	String, numeric field, date field, boolean
is greater than	Numeric field
is greater than or equals	Numeric field
is less than	Numeric field
is less than or equals	Numeric field
is one of the following values	String, numeric field, date field See Multiple values.
contains	String
starts with	String
ends with	String

Operator	Data field type
is empty/un-known	String, numeric field, date field, boolean See Empty fields (NULL values).
is not empty/un-known	String, numeric field, date field, boolean See Empty fields (NULL values).
in exactly X hours	Date field
in exactly X days	Date field
is anniversary	Date field Compares the day and month of the date field entry with the current day and month so you can filter recurring events such as birthdays and anniversaries.
is anniversary in exactly X days	Date field
dates back exactly X days	Date field
dates back less than X days	Date field
dates back more than X days	Date field
dates back less than X months	Date field
dates back more than X months	Date field
month is current month	Date field Compares only the month of the date field entry with the current month.

Operator	Data field type
day is current day	Date field Compares only the day of the date field entry with the current day. However, this does not mean **today** because all dates that have the same day, will match.

Action-based conditions

If you selected **Action** in the second drop-down list, you can define the rule through recipient-specific actions or events (such as opens, clicks).

The following actions are available:

Action	Description
has caused hard bounce	Recipients who have generated a hard bounce. In the **Mailing** drop-down list, select either all mailings, mailings of a specific type or specific mailings.
has caused soft bounce	Recipients who have generated a soft bounce. In the **Mailing** drop-down list, select either all mailings, mailings of a specific type or specific mailings.
has clicked a link	Recipients who have clicked one or more links. Select a time period, the desired mailings, and the corresponding links. In the drop-down list **Count** you can define the number of clicks on a link (exact value or minimum number, optionally with upper limit).
has clicked in click profile at least X times	Recipients who have made a certain number of clicks in a selected click profile. Select a time period and the desired mailings. You can select the number of clicks and the desired click profile in the drop-down list **Clicks**.
has received mailing	Recipients to whom a mailing was sent, which means that the sub-scriber is not unsubscribed, blacklisted, or outbounced. Note that a recipient matching this criterion can still create a hard or soft bounce. To exclude these recipients, create the target group as follows: *has received mailing AND has NOT created soft/hard*

Action	Description
	bounce. **Note:** If you use Mailings Classic, please see the note in the FAQs.
has opened mailing	Recipients who have opened mailings one or more times. Select a time period and the desired mailings. In the **Count** drop-down list you can define the number of openings (exact value or minimum number, optionally with upper limit).
has replied	Recipients who have responded to mailings. Select a time period and the required mailings.
has created one or more post-clicks	Recipients who have created one or more post-clicks.

> **Note: Relative time period filter**
>
> In most action-based filters, you can select the **Period** filter **Within the last…** *n* **Hours/Days**. The relative time period filter takes into account the time span from the time of the calculation to the last relevant time stamp and calculates *n* further days/hours back from there. Example: The period filter *Within the last 1 hours* takes into account the currently started hour plus the last full hour. The highest possible time value of this filter is 119 min 59 s.

Mailing types

In action-based filters, you can select under **Mailings** the option **Mailings of type**. The mailing types from the drop-down list include the following mailings:

- **Regular**. Optimized mailings of an A/B test (Smart Campaigns) and mailings from Mailings Classics (deprecated).
- **Special**. Transactional mails.
- **Confirmation email**. Confirmations.
- **Split**. Split mailings from Mailings Classics (deprecated).
- **Campaign**. Mailings and split mailings of a Smart Campaign (without optimized mailings).

> **Tip:** To select all mailings of an A/B test in a Smart Campaign, select both options **Regular** (to select the optimized mailing) and **Campaign** (to select the split mailings).

Post click conditions

If post-click tracking is configured for your client, actions that a recipient does on your website are tracked. You can create target groups using the post-click data, for example, from select recipients who have bought a certain item in your online shop.

You can track post-click data using the proprietary Episerver Campaign post-click tracking or a full-featured web analytics software. Episerver maintains partnerships with several vendors, for example, Adobe, Webtrekk, Econda, Google Analytics and eTracker. If you are interested in this option, contact your Episerver account manager.

To create a target group with post-click data, perform the following steps:

1. In the second drop-down list, select **Action** and in the following drop-down list, select **has created one or more post-clicks**. The input mask changes according to the post-click setup of your client.

2. If you use more than one post-click or web analytics service, select the one you want to use from the **Service** drop-down list.

   > **Tip:** The internal Episerver Campaign post-click tracking is called **default**. If you use only one service, this drop-down list will not appear when creating the target group. The service is displayed, though when you save the target group condition.

3. In the **Mailing** list, you can select post-clicks that are created through a designated mailing. If you leave this selection empty, any mailing, or no mailing at all, respectively, is taken into account.

   > **Tip:** Post-click data that were not created through a mailing can be processed only if they carry a user ID identical to the recipient ID within Episerver Campaign. Therefore, the ID your customers use when logging in to your online shop should be the same as the recipient ID used in Episerver Campaign. Usually, the email address is used as recipient ID. New customers and customers that do not want to receive promotional emails can also receive system emails (such as order confirmations) via Episerver Campaign. If customers register for your newsletter, their post-click data is completely available.

4. To delimit post-clicks to a period or date, select a type in the **Period** field and enter a date or a number of days in the calendar interface. The following scenarios are available:

- **No restrictions**. Post-clicks are not delimited by time.
- **From … until …**. Post-clicks must be created in the designated period.
- **On …**. Post-clicks must be created on a designated date.
- **Not on …**. This scenario excludes the selected date.
- **After or on …**. Post-clicks must be created on the selected date or later.
- **Before or on …**. Post-clicks must be created on the selected date or earlier.
- **Older than … days**. Post-clicks must be created X days ago or earlier.

  - In regular mailings, the time range is calculated from the sending date.
  - In system mailings, the time range is actualized every day.

- **Exactly … days ago**. Post-clicks must be created exactly X days ago.

  - In regular mailings, the date is calculated from the sending date.
  - In system mailings, the date is actualized every day.

- **Within the last … days**. Post-clicks must be created within the last X days.
- **Within the last … months**. Post-clicks must be created within the last X months.
- **Today**. Post-clicks must be created on the current day.

  - In regular mailings, this day is the sending date.
  - In system mailings, an actualization is made every day.

- **Current month**. Post-clicks must be created in the current month.

  - In regular mailings, this is month in which the mailing is sent.
  - In system mailings, an actualization is made every day.

5. Select a category.

> **Tip:** You can define categories individually and contain a string (such as *product name*) or a float value (such as *revenue*). You can combine several categories in one target group condition and therefore select recipients who have bought product A and B or have bought products from group X for more than 500 dollars. By combining several post-click categories you may create recipient segments for discounts, cross- and up-selling offers, and so on.

6. If the selected category is a string, you can select one of the following operators from the list:

- equals
- does not equal

- contains
- is empty
- is not empty
- starts with
- ends with

7. Enter the identifier in the field next to the operator.

> **Tip:** The automatic completion function helps you to exactly match the name you are looking for. By default, the automatic completion shows the first ten or fewer matches.

8. If the selected category is a float value (for example, a product price), you can select one of the following operators from the drop-down list:

- equals
- does not equal
- is greater than
- is less than
- is less than or equals
- is greater than or equals

Optional: To aggregate post-click values, select one of the following operators from the drop-down list that appears to the left:

- one occurence in
- sum of
- average of
- number of

9. In the field next to the operator, enter a value.

> **Note:** When the selected operator is **equals**, the entered value must match exactly the value given by the system, including decimal places. Follow the instructions for [entering multiple values](#).

10. Click **Apply** ✅.

Recipient list-based conditions

If you selected **Recipient list** in the second drop-down list, the system checks whether recipients are contained in a recipient list. Perform the following steps:

1. In the **Recipient list**, click a recipient list.
2. Click **Apply** ✅ to add the condition to your target group.

> **Note:** Episerver Campaign identifies recipients by recipient ID, usually the email address. If you are using custom recipient IDs (i.e., no email addresses), you have to select recipient lists that use the same custom recipient IDs.

Campaign-based conditions

If you selected **MA campaign** in the second drop-down list, the system checks whether recipients are currently passing through or have already passed through a specific Marketing Automation campaign. You can select multiple campaigns for this condition also:

1. In the drop-down list, select **has passed through MA campaign X** or **is currently passing through MA campaign X**.
2. In the following drop-down list, select one or more campaigns.
3. Click **Apply** ✅ to add the condition to your target group.

Target group-based conditions

If you selected **Target group** in the second drop-down list, the system checks whether recipients are contained in a target group. Perform the following steps:

1. In the drop-down list, select **Recipient matches target group X**.
2. In the following drop-down list, select the desired target group.
3. Click **Apply** ✅ to add the condition to your target group.

Use this condition to add target groups that are used many times (such as **Men**, **Women**, ...) as a component to other, more complex target groups. Thus, you only have to define these component target groups once and can reuse them whenever they are needed.

> **Note:** When defining target groups with a target group-condition, take care that they do not exclude each other reciprocally. For example, the target group you want to create matches recipients from the Greater London area. To do so, you define a condition that matches the respective postal codes. If you add a target group-based condition to this target group matching recipients from Northern England, these two conditions would exclude each other reciprocally and there would be no matching recipients in this target group.

Selecting multiple values

If you select **is one of the following values**, you can enter multiple values in one text box. For example, if you want to copy values from a CSV file:

1. Select the operator **is one of the following values**.
2. Enter the values, for example, comma-separated.
3. Open the drop-down list, click the gear symbol (**Separate multiple values**) and in the box, enter the used delimiter symbol.
4. Click **Apply** ✔. The entered values are now handled as single values.

Managing empty fields

There are generally three types of fields.

- Fields which contain a value (Place of residence = "Berlin")
- Fields which contain no value and are empty (Place of residence = "")
- Fields which are unknown (Place of residence = unknown)

For example, if you acquired additional newsletter subscribers through an external action (such as a sweepstakes) and imported these into your recipient list, some will not contain information for *Place of residence*. If you want to select recipients in your target group who do not live in Berlin, the condition would be as follows:

Target group definition				
not ⌄	Recipient list field ⌄	City ⌄	is equal to ⌄	Berlin ✔ ✖

With this, recipients are selected who have entered a place of residence other than Berlin (such as Boston). However, the rule does not consider null values (unknown or no place of residence) because the Episerver Campaign logic assumes that it cannot be determined whether the recipient resides in Berlin or not.

However, with another rule, you can modify the target group so that recipients whose places of residence are unknown are also selected. To do this, add the rule *.Recipient list field "City" is empty/unknown* and link both rules with **or**:

Target group definition			
The value of field **"City"** is not **"Berlin"**.			
or ⌄	Recipient list field ⌄	City ⌄	empty/unknown ⌄ ✔ ✖

Thus, you include recipients without an explicit place of residence by using the query **is empty/unknown**.

Analyzing a target group

The target group analysis lets you check a target group for correct functionality. You can check how many recipients from recipient lists the target group definition matches. You can also change the definition, if necessary, before sending the mailing.

1. Open the start menu and select **Recipients > Target groups**.
2. Select a target group and click **Analysis**. The **Edit Target Group** window opens showing the target group definition.
3. In the **Analysis** area, in the **Recipient list** drop-down list, select one or more recipient lists for which you want to perform the target group analysis.

> **Note:** Ensure that all selected recipient lists have at least one media type in common. If several lists with more than one media type in common are selected, then select which media type represents the delivery method. For example, if you want to send emails, then select the media type **Email**.

4. If you use a default target group but you do not want this to be included in the calculation, select **Disable default target group for this calculation**.
5. Click **Calculate**. The calculation is started in the background. If the analysis is completely calculated, the graphical analysis is displayed.

   The analysis contains the following information:

   - **Recipients**. Displays all recipients of the selected recipients lists that match the target group. The recipients are sorted by the following categories:

     - **ready**. Matches the target group and ready for dispatch. You can send mailings to these recipients.
     - **bounced**. Matches the target group but is not ready for dispatch, because they are too many bounces.
     - **blacklisted**. Matches the target group but is not ready for dispatch, because they are blacklisted.
     - **unsubscribed**. Matches the target group but is not ready for dispatch, because they are unsubscribed.

   - **Recipient lists (ready)**. Displays the number of recipients of the corresponding recipient lists that match the target group and can send a mailing to; recipients that create too many bounces, that are blacklisted, or unsubscribed are not taken into account here.

> **Tip:** If you want to change the target group, because it does not match the desired number of recipients, edit the definition and perform the analysis again.

6. If the *Example recipients* feature is enabled in your client, after the analytical calculation you can display sample recipients (up to 100 datasets) that meet the target group definition. To do so, click **Example recipients**. A window with up to 100 sample recipients opens.

> **Note:** To enable the *Example recipients* feature, you need the consent of your recipients to view and use personal data. If you have this consent, complete a declaration of release for the use of personal tracking data, sign it, and send it to customer support. This form is available from [customer support](#).

Counting recipients in several lists and list order

If a recipient is contained in several recipient lists, the recipient is counted only once. The order of the recipient lists is crucial for the final result, too.

Example:

- Recipient list **Premium customers** with a total of four recipients: Peter Marston, Mark Smith, Lea Harris, Sarah Howard
- Recipient list **Default customers** with a total of four recipients: Peter Marston, Mark Smith, Julia Green, Sarah Howard

Perform the following steps:

1. Create a target group *women*.
2. First, select the recipient list **Premium customers** and then the recipient list **Default customers**. On the left, the analysis shows that mailings can be sent to only three recipients (Lea, Sarah, Julia); the recipient Sarah Howard is contained in both recipient lists so is listed once. On the right, two recipients (Lea, Sarah) of the recipient list **Premium customers** and one recipient (Julia) of the recipient list **Default customers** match the target group:
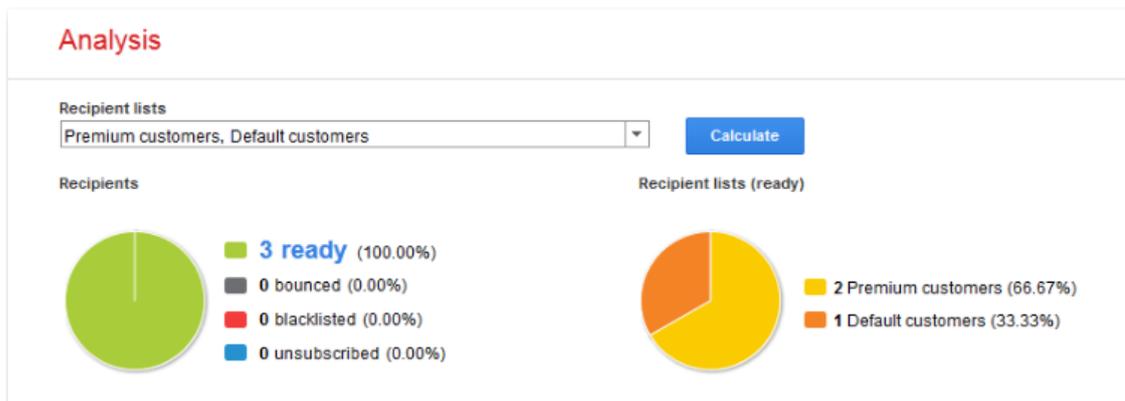
3. Swap the order of the two recipient lists and perform the analysis again. The two recipients (Julia, Sarah) of the recipient list **Default customers** and one recipient (Lea) of the recipient list **Premium customers** match the target group:
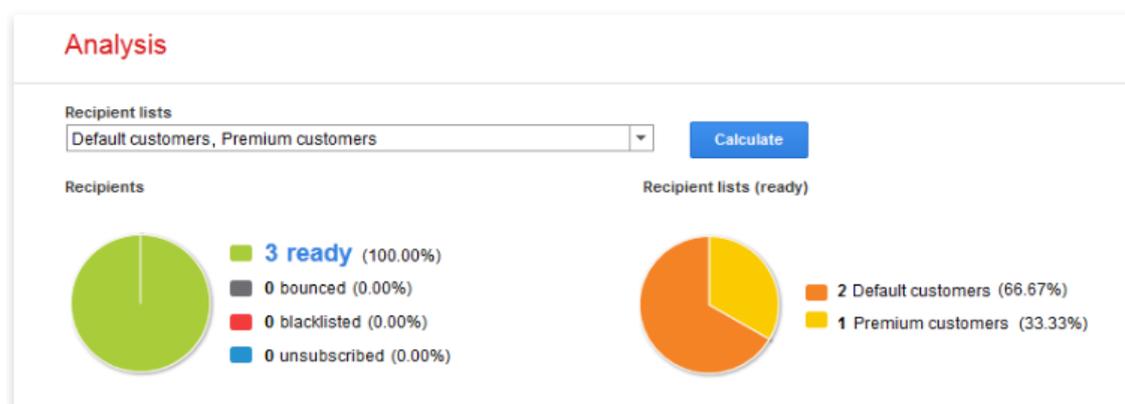
Also, you can use the target group analysis to evaluate your recipient lists. For example, you can quickly get the number of women contained in your recipient list. To do so, create the target group definition *The value of the field Salutation equals Mrs.* and perform a target group analysis for a recipient list. However, perform such evaluations only on single recipient lists because recipients that are contained on multiple recipient lists are only counted once (as described above).

Opt-in

The opt-in method forms the basis for operating legally compliant email and omnichannel marketing campaigns. An opt-in method requires recipients to give a sender explicit permission to send them advertising mails. For this, the recipient:

- actively agrees to receiving advertising emails by, for example, ticking a box, or
- separately states that this acceptance relates solely to the receipt of advertising emails, or
- agrees to a declaration that clearly defines the scope (Who is the advertiser? What is being advertised? How often?).

This topic provides detailed information about the opt-in procedure and the double opt-in to ensure you have evidence that permission was given.

> **Note:** The following information is not legally binding.

Legal basis

In accordance with paragraph 7, section 2 UWG (the German Unfair Competition Act), sending advertising emails to consumers without their prior express consent is considered an unreasonable nuisance and unfair competition.

To protect consumers from receiving unwanted email (spam), legally compliant email and omnichannel marketing are based on permissions. The sender must have the consumer's consent to receive emails (for example, newsletters).

If a recipient has given permission via an opt-in method, the sender has valid proof of consent in the event of a complaint by the recipient.

Should legal action arise, the opt-in must be demonstrable in a court of law. Precise version management of the opt-in processes is advisable for use in practice.

Exceptions

Transactional mails do not generally require an opt-in. For example, registration and order confirmation emails may be sent without an opt-in. However, this only applies if the transactional mails do not contain additional advertising.

Omnichannel marketing: Separate opt-ins

In accordance with mandatory documentation requirements of data protection legislation, ensure that you collect and record a separate opt-in for each advertising medium (telephone, text message, email and so on).

The opt-in text must exclusively seek consent for sending promotional material and – as opposed to generic "general consent" for types of advertising – the text must precisely describe the promotional materials. For example, you should differentiate between a regular newsletter and a reminder message that is sent when a customer does not respond to an offer.

Validity of the permission

An opt-in may expire as established by current case law. This is generally be the case if you do not contact a recipient for over one year. The previously given consent will no longer apply if you begin contacting the recipient again after this period.

To prevent opt-ins from expiring, contact recipients regularly.

Opt-in method types

- Double opt-in method

  > **Note:** Episerver recommends the use of this opt-in method.

  The double opt-in method is a procedure in which the end user consents to receiving emails from the sender before any promotional emails are sent. Recipients receive an email with a double opt-in link, which they must click to confirm their newsletter registration.

  Their addresses are only added to the recipient list after they click the link. This method is intended to ensure that end users are not signed up for services against their will by third parties. This not only aggravates the end users but also forces them to tediously unsubscribe from the services.

  Reasons to useEpiserver Campaign to manage double opt-ins

  - The entire process is managed from a single source.
  - Almost the entire subscription process can be managed by a single system.

  By comparison, managing the process using an external system requires recipient data to be synchronized and/or imported prior to every dispatch, which is a lot more work.

- Single opt-in method

  > **Warning:** Episerver does not recommend use of this opt-in method.

  Using the single opt-in method, an end user agrees to receive emails from the sender. Their email address is then entered into the recipient list. Unlike the double opt-in method, confirmation links are not sent. From a legal standpoint, the single opt-in method is not recommended because it cannot be assumed that recipients have entered their email addresses into the recipient list themselves.

- Confirmed opt-in method

> **Warning:** Episerver does not recommend the use of this opt-in method.

In the confirmed opt-in, an end user agrees to receive emails from the sender. The recipient receives an email confirming that their data is recorded, and that they will receive newsletters by email. This method suffers the same problems as the single opt-in method, except that the recipients are directly informed that their data was entered into a recipient list.

Implementing the double opt-in method with Episerver Campaign

Setup

If you want to use the double opt-in method, contact customer support, who sets up the opt-in process and creates the confirmation-mailing that contains information about the subscription. You can adapt this mailing as you like, and it must include the **double opt-in link** (using the field function `{Double-Opt-In-Link}`). This link refers to the confirmation page, which is provided by Episerver or hosted by you.

Adapting your website

In the next step, you update your website so that the opt-in process you set up is initiated when a new recipient subscribes to the newsletter using the form. If you are using the REST API, you can add one or multiple recipients to a recipient list. You can also set up the connection using the add2 or addAll3 methods, using the SOAP API, or using the subscribe operation in the HTTP API (the opt-in process IDs required for this are available in the API overview).

Examples

1. Newsletter subscription
2. Confirmation email
3. Confirmation

NEWSLETTER

CONFIRMATION

Thank you for your interest in our newsletter. Shortly you will receive an email including an activation link. Please confirm your subscription by clicking on the link in the email.

Return to Homepage

Your company

Product   Company & Service   Resources

Thank you for your interest in our mailings. Please confirm your subscription by clicking on the following link.

Click here to confirm your newsletter subscription

If you do not wish to receive the newsletter in the future, you will find a link to unsubscribe at the end of each email.

Your customer support team

Email: info@example.com   Phone: +123 456789

◆CSA eco BVDW TÜV M³AAWG

600 | Episerver Campaign User Guide 2019-11-28
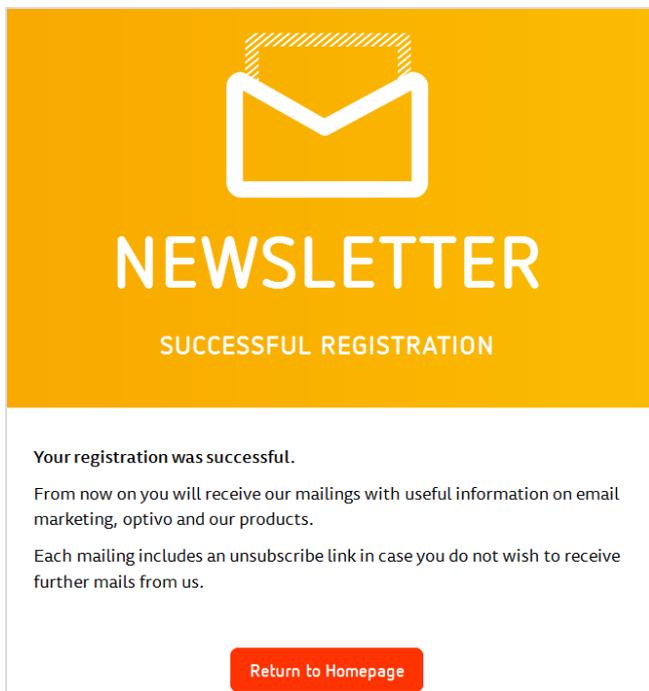
Frequently asked questions about the double-opt-in method

1. How do I explain the additional steps to new subscribers when they sign up for the newsletter?

- **Information**. After new subscribers enter their information, clearly inform them that an additional step is required to activate the newsletter subscription ("We have added your email address to our list. To activate ... "). Explain why this step is necessary. For example, "to prevent other people from subscribing using your email address" or "to validate your email address".

- **Link**. Instruct recipients to activate their subscription after entering their information. If possible, provide a link to their mailbox for activating the subscription. You can use the domain parts of the email address to determine which email provider the recipient is using and to create a link to the specific service. Example: If the new subscriber has an xxxx@example.com address, then you can display a "Go to my email inbox" link that takes them to the login page at www.example.com.

- **When to send the confirmation email**. You should send the confirmation email as soon as possible after the sign up, so it can be activated quickly. The recipient may otherwise forget the reason for the confirmation email or lose interest in the newsletter.

2. What should I be aware of when setting up the activation email?

- **Subject**. Ensure that your activation email has a meaningful subject line that directly prompts the user to take action. For example, "Please confirm your email address".

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- **Sender**. The sender name is often the first thing that a person sees and should be recognizable. You should use a consistent sender name for emails, including the activation email. Give your potential subscriber an option to reply to the activation email (avoid using a noreply@...email address).
- **Presentation**. The activation email should avoid using large blocks of text and complicated layouts. Your recipient needs to click the confirmation link. Help them by providing concise and accurate instructions along with a clearly visible confirmation link.
- **Spam suspicion**. Inform new subscribers that emails from new and previously unknown senders may land in their spam/junk mail or unknown mail folders. If the recipient cannot find the confirmation email, they should check these folders.

3. **What problems can arise when using the confirmation link in an activation email?**

- **Short length**. Make sure that the confirmation link is not too long. Otherwise, there is a danger that it may get broken across two lines and no longer work. In case this happens, you should offer a solution to your subscribers, for example, "If the link does not work, copy both lines into the address bar of your browser." You should further ensure that the confirmation link stands out from the other text in the message, even if the email preview area is small.
- **Correct link**. A further potential source of problems is a confirmation link that does not work. This can happen if the link contains a special character, which causes Outlook or Thunderbird to incorrectly highlight it and thus send the user to a blank page. Another frequent link problem is forgetting to use the HTML anchor tag properly. Check that the confirmation link is correct.

4. **How can I avoid any possible problems with the sign up process?**

- **Address book entry**. Tell new subscribers to add your email sender address to their personal address book or list of secure senders. You can say something like "To ensure that you receive our newsletter...". This will ideally be supplemented with a link to instructions for common email programs and webmail providers to help with this step. You can also provide a vCard that can be used with some email programs to add your contact data to the address book with a single mouse click.
- **Help / contact options**. Give the user options for providing feedback or contacting you (email address, chat, free phone number, "not working" button) in case of problems with registration or confirmation. This can also be an important feedback channel for identifying problems or areas for improvement in the process. A more elegant solution is to provide contact information for a personal adviser or customer support representative, if this would be appropriate or possible.
- **Resending**. Provide the recipient the option of having the activation email resent in the event that it has not arrived within the first few minutes or the recipient is unable to find it.

Best practices for permission-based email marketing

This document examines the double opt-in process, which lets you get consent from your recipients and provides documentation to prove that consent was given. Episerver provides the best practices for putting together an opt-in mailing.

What is an initial opt-in?

With the initial opt-in, you can use a standardized procedure to obtain the permission of your recipients and verify the provided email addresses.

The address data that you provided is imported into Episerver Campaign within the framework of the initial opt-in. An automatic system email is sent to these addresses. The recipients of this email can click the provided link to confirm their agreement to receive your newsletter. Each subscriber who gives permission in this way is added to the recipient list in Episerver Campaign. Your recipient list will only include subscribers who have explicitly requested the newsletter.

As the sender of the newsletter, you profit from an initial opt-in because you are in possession of your recipients' consent to receive marketing communications in case of complaint.

Best practices for putting together the opt-in mailing

When composing a professional opt-in mailing, take note of the following:

Inbox

Every mailing has certain content elements that your recipients will notice at first glance in their inbox. You should draft your opt-in mailings in a way that your recipients know what they are dealing with:

- Clear sender identification (email address and sender name)
- Clear and enticingly formulated subject line
- Pre-header with additional subject line and link to online version

Contents

The content elements of your opt-in mailing should entice the recipients to click. They must be absolutely free of advertising:

- The confirmation link must be clearly recognizable even when images are deactivated
- Branding: logo placement at most (ideally without linking)
- Clear formulation of the mailing objective but without the character of an advertisement
- Best practice: It should be understandable from the text that the recipient is being asked to reconfirm the subscription to the newsletter
- Stress the option to unsubscribe at any time in every mailing
- 3-4 confirmation links should be placed (visible and clearly identifiable), for example within the text of the message and as a button
- No advertising content

- No links to social media channels
- No unnecessary links but rather a clear focus on the confirmation link
- Clear and enticing formulation of the confirmation link: "Yes, I want to continue to receive the newsletter."
- Explanation of what happens if the confirmation link is not clicked
- Reference to the source of the original subscription

Footer

Provide information about the company and data protection:

- Full legal imprint
- Reference to data protection
- Link to the data protection provisions found on your homepage
- Mention the addressee's email address in the footer

Your opt-in mailing in detail

Enticing subject line

The subject line of your opt-in mailing must be free of advertisements yet enticing at the same time:

- *Renew your newsletter subscription now.*
- *Please confirm your subscription to the new [Company] newsletter now.*

HTML format

Here is an example of an opt-in mailing in HTML format:

In case the newsletter is not displayed correctly please click here.

Your logo

Please confirm your subscription to the newsletter!

Dear newsletter subscriber,

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Ligula eget dolor. Lorem ipsum dolor sit amet, consectetuer adipiscing elit. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo.

Please confirm your subscription by clicking the following link:

✔ Yes, I would like to receive the SAMPLE newsletter

Explanation of what happens if the confirmation link is not clicked
Place note about options for unsubscribing here

In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis retium. Integer tincidunt. Cras dapibus. Vivamus elementum semper nisi.

Etiam sit amet orci eget eros faucibus tincidunt.

Your Newsletter-Team

Imprint:

Your company   Phone: 0123 – 45678910   YourDomain.de
Sample Street 1   Fax: 0123 - 45678920   service@YourDomain.de
2345 Sample City

Managing Directors:

Sam Sample, Sammy Sample
HRB, Local Court of Sample City
VAT ID DE123 456 789

Text format

There must be a text version of your opt-in mailing. Here is an example:

Editorial:

Dear newsletter subscriber,

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor.

Please confirm your subscription by clicking the following link:

Link:
http://ihre-newsletter-domain.de/go/7/21S5XYZJ-1URYRCY-1UEE789-W4Q2345-I.html

In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis retium. Integer tincidunt. Cras dapibus. Vivamus elementum semper nisi.

Explanation of what happens if the confirmation link is not clicked.
Place note about options for unsubscribing here.

Etiam sit amet orci eget eros faucibus tincidunt.

Your
Newsletter Team

Imprint:
Your company
Sample Street 1
2345 Sample City

Phone: 0123 - 45678910
Fax: 0123 - 45678920

YourDomain.de
service@YourDomain.de

Managing Directors:
Sam Sample, Sammi Sample
Commercial Register:
HRB 12345 Local Court of Sample City
VAT ID: DE123 456 789

Creating subscription and unsubscribe forms

This topic explains how to create forms for users subscribing to and unsubscribing from newsletters. The appendix provides model texts, error messages, and sample forms you can use for reference.

To begin, provide Episerver with the information specified below. On request, Episerver creates customized subscription and unsubscribe forms for you. To do so, contact customer support.

Required data

To subscribe to a newsletter, you typically need at least a user's email address. Generally, you want to additional information from a user, to address recipients personally. When requesting information, distinguish between required and optional fields.

To comply with legal provisions, you must also specifically identify any personal information that is required to make use of a service (only applies to email addresses), and any personal information collected with or without the user's knowledge. With respect to your subscription form, this means:

- The only required field is the recipient's email address.
- Other fields are optional (because they are not absolutely necessary to receive a newsletter). The personal information collected in them is provided voluntarily. These may include a user's interests, age and place of residence (or zip code). The user can select from a list of interests by clicking check boxes. Age and zip code can be selected from a list. This information does not require the recipient's declaration of consent. If you want to make these required fields, include a reference to the rules on data privacy protection.
- Personal information collected without a recipient's knowledge that occurs through that recipient's actions (click data), for example, by opening a newsletter, requires the recipient's consent.

> **Note:** Each data field in a form must have a corresponding recipient list field to which the data is imported.

Creating the design and text

The design of form pages should be as simple and clear as possible. Ideally, the user should not need to use the scroll bar to reach the bottom of a page. This means that the fields used in a form, data protection notices, and the **Send** button should be arranged so that they display in the most commonly used screen and font sizes without needing to scroll.

If the form is to be integrated into your web page, for example, your shop site, specify your frame size (width in pixels). In this case, make sure that your website's HTML code supports scroll bars; otherwise, the form may not display correctly.

Using an HTML template

A good idea is to send Episerver the pages as HTML templates. You need a separate template for each page (for example, subscribe page, unsubscribe page).

If you use this option, texts (except error messages) must be included in the template in their final form. In addition, specify the error messages to be displayed if a field is not completed or filled out incorrectly.

If you want to provide the template as a graphic, send the text in a separate text file.

Displaying error messages

Indicate which error messages should appear and where they should be displayed. For example:

Error	Error message	Where to be displayed
No email address entered	*Please enter an email address.*	Next to email input field

Error	Error message	Where to be displayed
Consent not provided	*You must confirm that you want to receive this news-letter.*	Next to check box
Required field not com-pleted	*Please complete all required fields.*	Next to the applicable field

> **Note:** Error messages should appear as text directly above, alongside, or below the applicable field in a form. Alternately, they may appear at the top of a page, with a reference to the applicable field.
>
> It is best if error messages are placed as close as possible to the referenced field, so their meaning is clear. Highlight the relevant field in color. Specify the font size, color and other style elements (background color, frames and so on) to be used in error messages, or provide Episerver with a graphic template.

Specifying confirmation texts

Specify text to display on the confirmation page (after registration is completed). Specify a sample layout (see above).

Setting up a confirmation email

If subscriptions use a **confirmed or double opt-in** process, you need to send a confirmation email to the recipients. Episerver can set up this email in your Episerver Campaign client so that it is sent automatically when a subscription is submitted. You can manage the content of this email through Episerver's systems. You can change the texts at any time.

To set up a confirmation email, specify the following information:

- Type of email (text, HTML or multi-part)
- Name and email address of sender
- Subject
- Personalization (for example, salutation)

Handling user-provided data

Recipient data is forwarded to a recipient list in Episerver Campaign. Only data for which a corresponding field exists in the recipient list can be recorded.

You should first decide if you want to use an existing recipient list in your client. Which fields are available are determined by the fields in those recipient lists.

To create a new recipient list, tell customer support the recipient list name and which fields it should contain. In general, the following apply:

Form field type	Recipient list field type
Free-form text	Text
Pop-up menu	Text (with set values)
Age, zip, and so on	Numerical
Check box	Boolean (possible values are true and false)
Option	Text, numerical or boolean

Sample text and forms

The following are sample texts and forms. You may use the texts either as they appear or in modified form.

Data privacy notice on use of personal information provided voluntarily

```
Your personal information will only be stored if you provide it to us voluntarily,
for example, when registering, completing a survey or as part of a contract.
By providing this information to us, you are indicating your consent to the storage,
use and processing of this information. We will not disclose your information
to third parties without your consent. You may withdraw your consent to the storage
and disclosure of your personal information at any time.
```

Data privacy notice on the use of data collected without the user's knowledge and stored in aggregate form

```
To personalize our newsletters and better address your specific interests,
we analyze and store your clicks on links in our newsletters.
We guarantee that the analysis and use of this information is carried out
only in aggregate form and that under no circumstances will this information
be transferred to third parties. By subscribing, you are indicating your consent
to the collection of this information. You can cancel your subscription at any time.
Your data will be deleted in its entirety upon cancellation.
```

Data privacy notice on the undisclosed collection of personal information

```
To personalize our newsletters and better address your specific interests,
we analyze and store your clicks on links in our newsletters. We guarantee
that the analysis and use of this information is carried out only in aggregate
form and that under no circumstances will this information be transferred to third parties.
By subscribing, you are indicating your consent to the collection of this information.
You can cancel your subscription at any time.
Your data will be deleted in its entirety upon cancellation.
```

Error messages

- *Please enter an email address.*
- *Please enter a correct email address.*
- *Please complete all required fields.*
- *Please indicate that you accept the data privacy provisions and the terms of participation.*

Confirmation page

- Simple "Thank you" page: *Thank you for your subscription to our newsletter, which will be sent to example@example.com.*
- "Thank you" page (confirmed opt-In): *We are delighted to periodically provide you with information about what's new at www.example.com. You will receive an email shortly confirming your subscription. You may of course cancel the newsletter at any time. You will find an unsubscribe link at the bottom of each newsletter.*
- "Thank you" page (double opt-In): *We are delighted to periodically provide you with information about what's new at www.example.com. You will receive an email shortly asking you to confirm your subscription. To confirm your subscription, please click the activation link contained in this email. You may of course cancel the newsletter at any time. You will find an unsubscribe link at the bottom of each newsletter.*
- Unsubscribe page: *You have been unsubscribed from our newsletter.*

Sample form

Send last mailing after double opt-in

> **Note:** Contact customer support to activate this feature.

This add-on sends the last regular newsletter to newly registered recipients after they complete the double opt-in process.

Unsubscribers

Consequences of a mailing unsubscription

If a recipient unsubscribes from your newsletter by clicking on the unsubscribe link or using the unsubscribe form, Episerver Campaign writes the recipient in a system-internal unsubscribe list.

The recipient's data record is not deleted from your recipient list; it is duplicated and copied to the system-internal unsubscribe list.

Email	Title	First name	Last name
peter.marston@example.com	Mr.	Peter	Marston
mark.smith@example.com	Mr.	Mark	Smith
bob.williams@example.com	Mr.	Bob	Williams
susan.jones@example.com	Ms.	Susan	Jones
margret.miller@example.com	Ms.	Margret	Miller
lea.harris@example.com	Ms.	Lea	Harris
boris.reed@example.com	Mr.	Boris	Reed
luke.cook@example.com	Mr.	Luke	Cook
donald.morgan@example.com	Mr.	Donald	Morgan
michael.jenkins@example.com	Mr.	Michael	Jenkins
jordan.patterson@example.com	Mr.	Jordan	Patterson
sarah.howard@example.com	Ms.	Sarah	Howard
may.adams@example.com	Ms.	May	Adams
julia.green@example.com	Ms.	Julia	Green

Email	Title	First name	Last name
tom.henderson@example.com	Mr.	Tom	Henderson
justin.allen@example.com	Mr.	Justin	Allen
rangar.bell@example.com	Mr.	Rangar	Bell
susan.jones@example.com	Ms.	Susan	Jones
adam.powell@example.com	Mr.	Adam	Powell
lola.coleman@example.com	Ms.	Lola	Coleman
christine.flores@example.com	Ms.	Christine	Flores
luke.cook@example.com	Mr.	Luke	Cook
meggan.nelson@example.com	Ms.	Meggan	Nelson
cindy.gonzales@example.com	Ms.	Cindy	Gonzales
lee.moore@example.com	Mr.	Lee	Moore
june.perry@example.com	Ms.	June	Perry
melody.hill@example.com	Ms.	Melody	Hill
bert.brown@example.com	Mr.	Bert	Brown

Note: By default, the system-internal unsubscribe list is linked to all recipient lists of a client. The unsubscribe list is not inherited by other clients in your user account.

If you want to link the system-internal unsubscribe list to only one recipient list in your client, contact the customer support to change the configuration.

How it works

For each sending, Episerver Campaign compares your recipient list with the system-internal unsubscribe list, then excludes recipients on the unsubscribe list. Episerver Campaign takes this approach so you can continue to analyze periods when the unsubscriber was active. To remove unsubscribers from your recipient list, manually delete them from your recipient list using the Cleanup feature.

If subscribing to the newsletter again, the recipient is deleted from the system-internal unsubscribe list after confirming the double opt-in. The recipient begins to receive mailings again.

Tip: Unsubscribes or new subscriptions are also possible via, REST API, SOAP API and HTTP API.

Querying a system-internal unsubscribe list

In the Episerver Campaign user interface, you cannot see the system-internal unsubscribe list. However, you can query unsubscribers as follows. But you can use the REST API to retrieve information about all unsubscribes. If you are using the SOAP API, use the contains and containsAll methods to query whether one or more recipients are on an unsubscriber list.

You can also export unsubscribers as CSV files. See [Exporting recipients](#).

Deleting unsubscribers from a recipient list

Use [Cleanup](#) to delete Unsubscribers from a recipient list.

Inserting an unsubscribe link into a mailing

If you use the Episerver Campaign's unsubscribe logic, Episerver sets up a field function to insert the unsubscribe link into your mailing. You can integrate the unsubscribe link in your mailing in two ways:

- Display the unsubscribe link URL: For example: *To unsubscribe from the newsletter, click here: example.com/unsubscribe/123456abcdefg.*
- Link the unsubscribe link to a word or phrase, such as *To unsubscribe from the newsletter, click here.*

Displaying the URL of the unsubscribe link

1. Move to the editor window of the mailing and click on the name of the paragraph that will contain the unsubscribe link (such as text/image paragraph or footer paragraph).
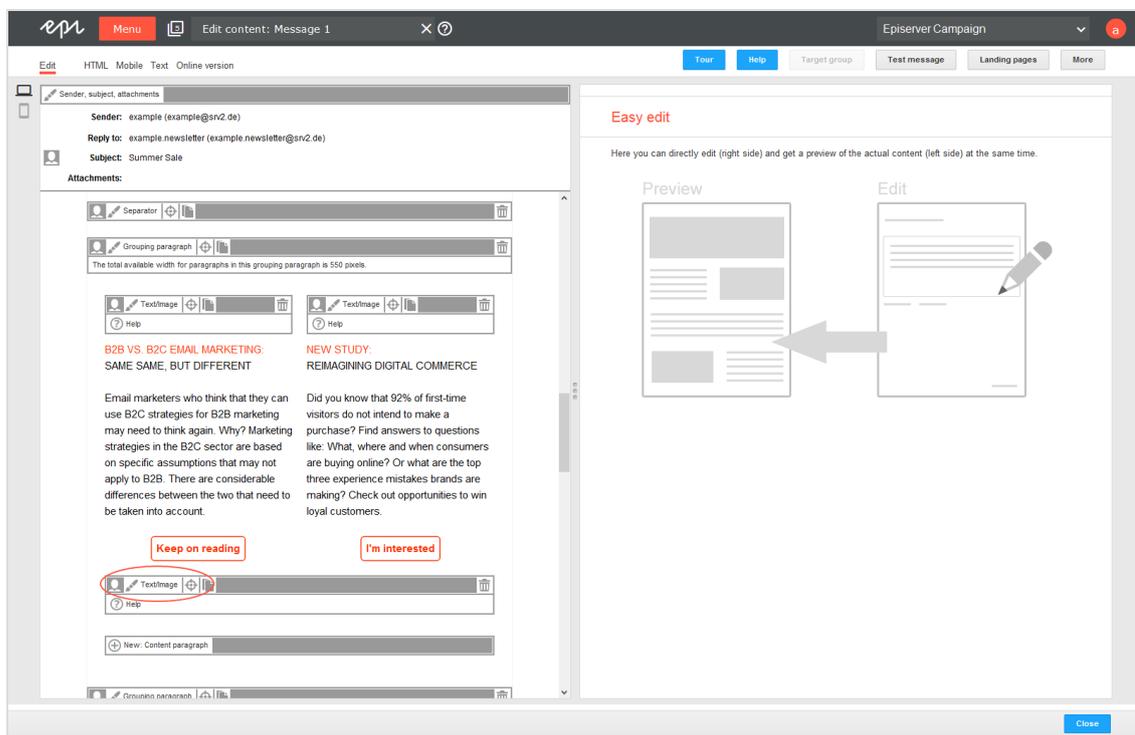
2. In the editor, insert the note for unsubscribing the mailing, such as *To unsubscribe from the newsletter, click here:*.

3. To insert the URL of the unsubscribe link directly, click where you want to insert the URL and click **Insert field function** .
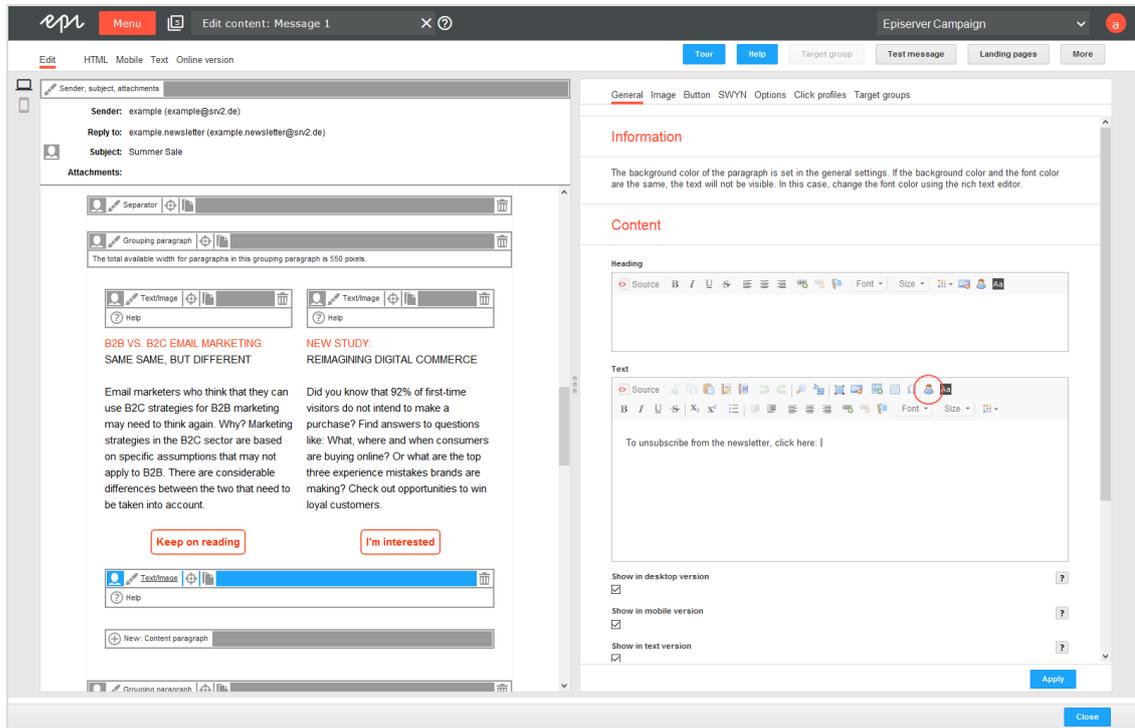
4. Select from the list the field function for the unsubscribe link and click **OK**.

5. Click **Apply**. The field function is displayed in curly brackets: *{Unsubscribe Link}*. When the mailing is sent, Episerver Campaign resolves the field function and inserts the URL of the unsubscribe link into the mailing individually for each recipient.
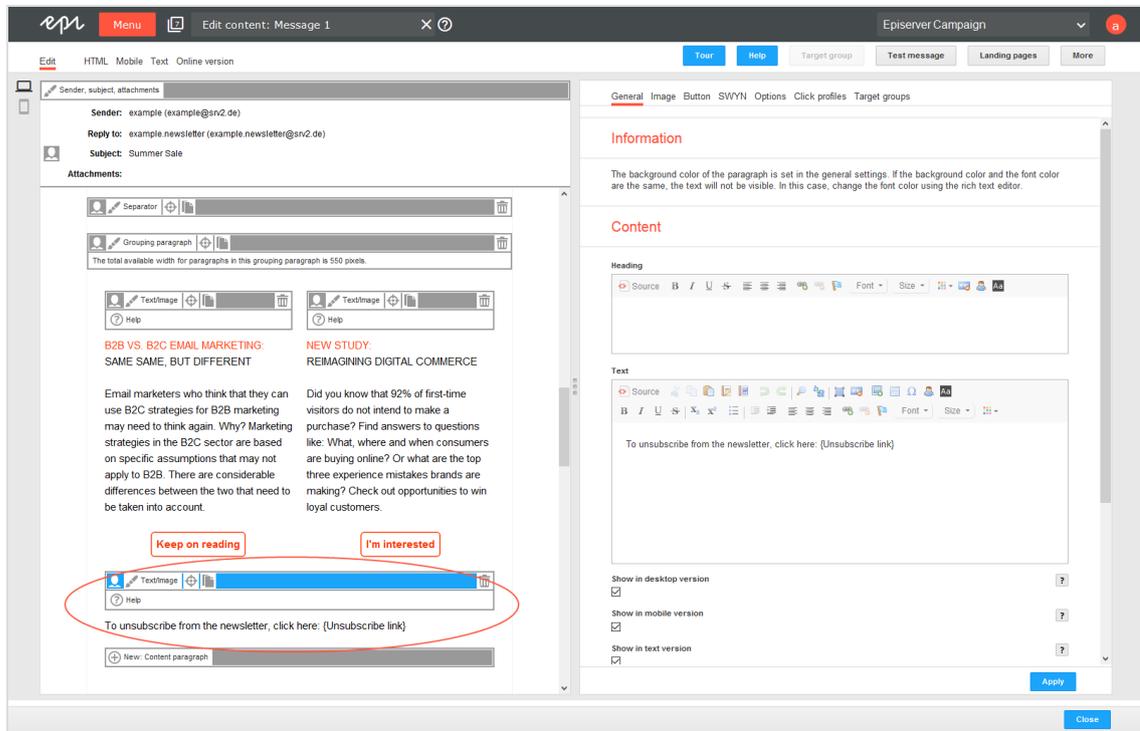
Linking the unsubscribe link to a word or phrase

1. In the mailing's editor window, click the name of the paragraph that will contain the unsubscribe link (for example text/image paragraph or footer paragraph).

2. In the editor on the right side, insert the note for unsubscribing the mailing, such as *To unsubscribe from the newsletter, click here.*

3. Highlight the word or phrase to be linked to the unsubscribe link, such as *here.*

4. Click **Link**
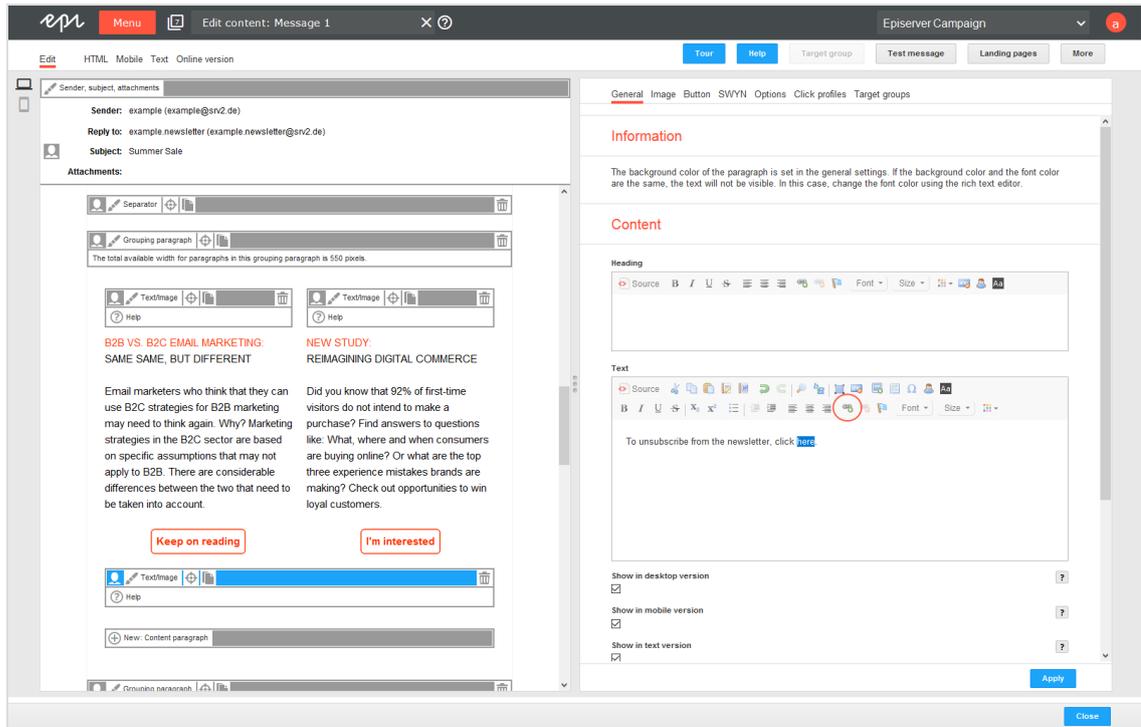
5. Enter the URL field `{Unsubscribe Link}` in curly brackets. In the drop-down list **Protocol**, the type changes automatically to *<other>*.
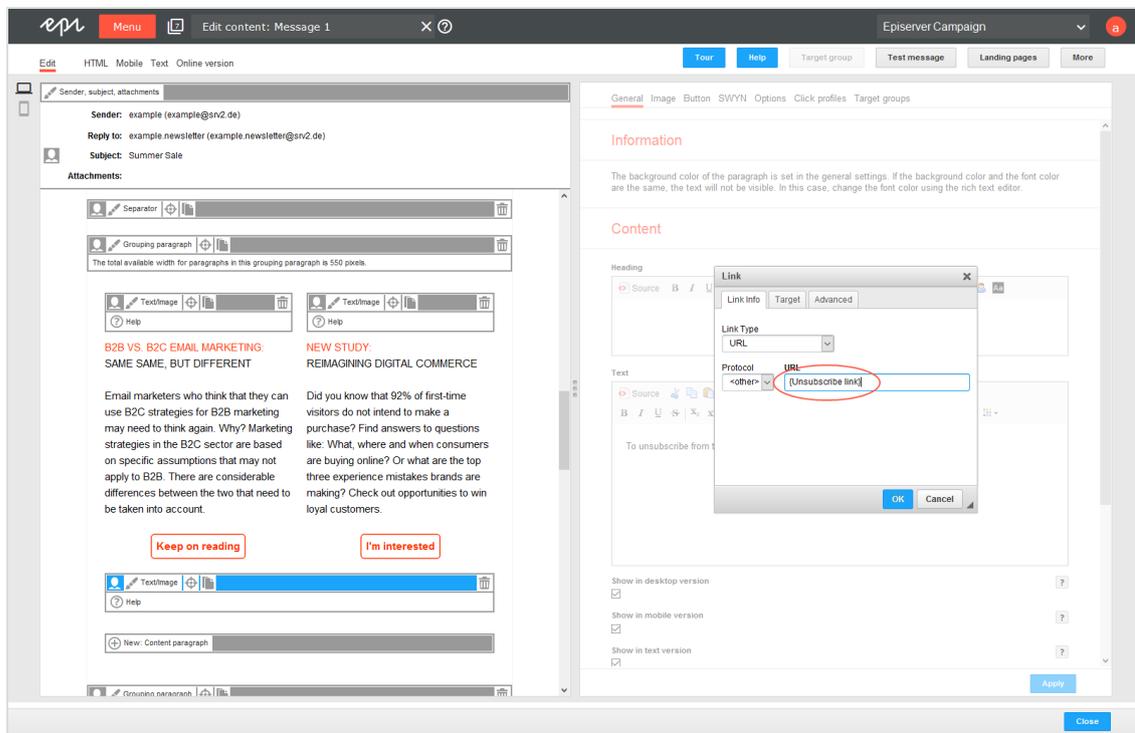
6. Click **OK**.

7. Click **Apply**.
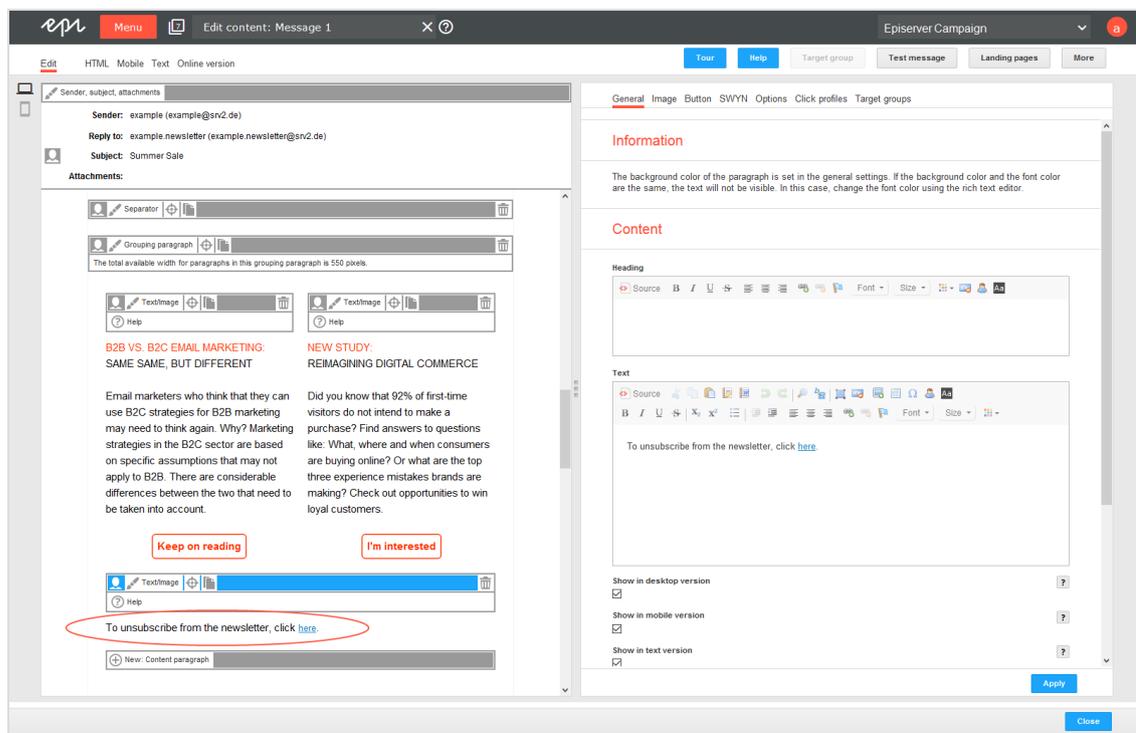
FAQs

- **Can I add a recipient to the unsubscribe list or remove a recipient from the unsubscribe list using Episerver Campaign?**

  No. The unsubscribe process can only be carried out by the recipient himself. To cancel unsubscription, the recipient has to subscribe to the newsletter again (depending on the configuration with opt-in).

- **Can I unregister a recipient by deleting the recipient from the recipient list?**

  If deleted from a recipient list, the recipient receives no more mailings via this list. If existing on more than one list, the recipient continues to receive mailings via other recipient lists from which he or she has not been removed.

  > **Warning:** This procedure is not recommended, as the deletion is not recorded and the recipient can be accidentally added to a recipient list again, for example when importing recipients. The legal consequence can be a warning if the recipient receives mailings despite unsubscribing.

- **I maintain my recipient list by myself and import it to Episerver Campaign before each sending. What do I have to consider?**

Make sure that you import only active recipients into the recipient list. Import unsubscribers into the unsubscribe list so that the cross check can take place before dispatch.

You can import unsubscribe lists or multiple lists via specially set up jobs/services. These jobs/services cannot be accessed via the Episerver Campaign user interface. The corresponding lists are transferred to the Episerver Campaign server via SFTP and automatically imported into the client:

- **Import unsubscribe list**. Import your local unsubscribe list into the unsubscribe list of your Episerver Campaign client.
- **Import recipients including unsubscribers**. Import a single recipient list that contains active recipients from different lists and unsubscribers. Enter the status of the recipient or the list into which you want to import in a separate column of the recipient list. In this way, you always have consistent lists.

To configure the jobs/services, contact **customer support**. You must have a defined name for the files that you want to import. You also must upload the files in a defined directory via SFTP.

- **What are list unsubscribe headers?**

By using list unsubscribe headers in a newsletter, recipients can unsubscribe from a mailing via the user interface of their email program (such as Gmail or Outlook). Searching for the unsubscribe link in a mailing is not necessary this way.

Recipient history

> **Note:** Contact **customer support** to activate this feature.

Use the recipient history to view the **message history** (Mailings Classic and Smart Campaigns), the **Marketing Automation history** and the **campaign analysis** (Smart Campaigns), view the **opening and click behavior** of your recipients and the **third-party ID**. This lets you see which email, which SMS, which push message you have sent and to whom it was sent.

For example, if a recipient contacts you to say that a newsletter was not received, you can investigate the reason why. In the recipient history, enter the recipient's data to see an overview of their communications. Using this information, you can check to see whether the recipient has perhaps inadvertently unsubscribed. You might see that the newsletter is sent and you should ask the recipient to check in their spam folder for the newsletter. You can even check to see if the recipient is currently in a **Wait** node and will receive the expected newsletter later on in the day.

You also can see how each recipient reacted to your communication with them: which messages they opened, and which links they clicked.

> **Note:** Recipient history is not available for print messages.

Showing message history

1. Open the start menu and select **Recipients** > **Recipient history**.
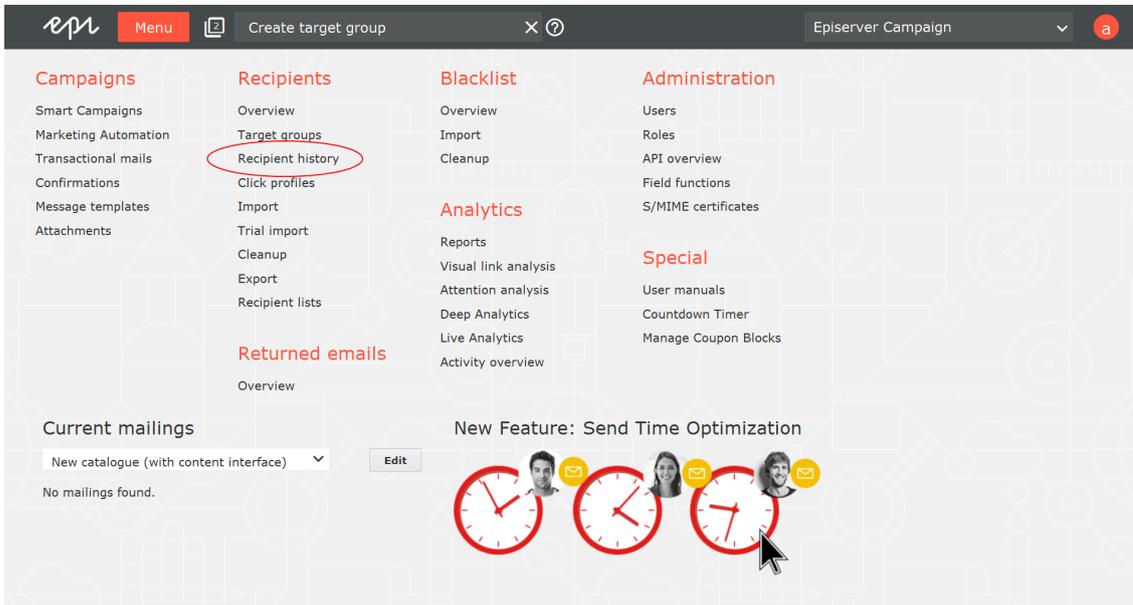
2. In the **Search recipient based on** drop-down list, select the type of information to use to find the message history for the recipient. You can use the recipient ID, email address, mobile phone number, or a push token.
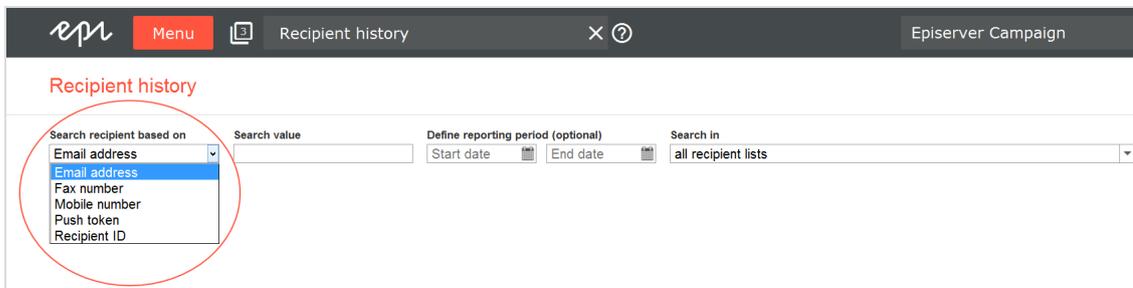
3. In the next field, enter the recipient ID, email address, mobile phone number or push token to search for.
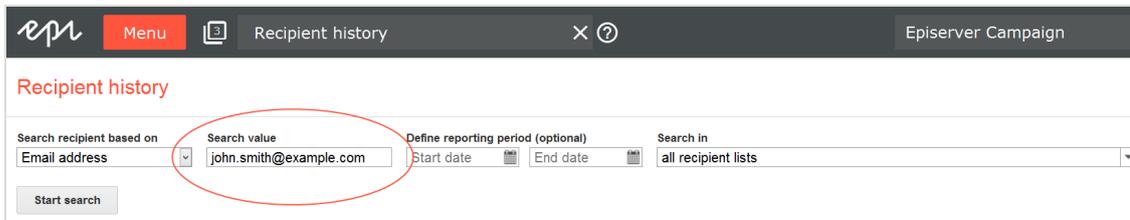
4. You can limit the time period for which the message history is displayed by entering start and end dates under **Define reporting period (optional)**. If you do not enter a start and end date, the entire message history for the recipient is shown.
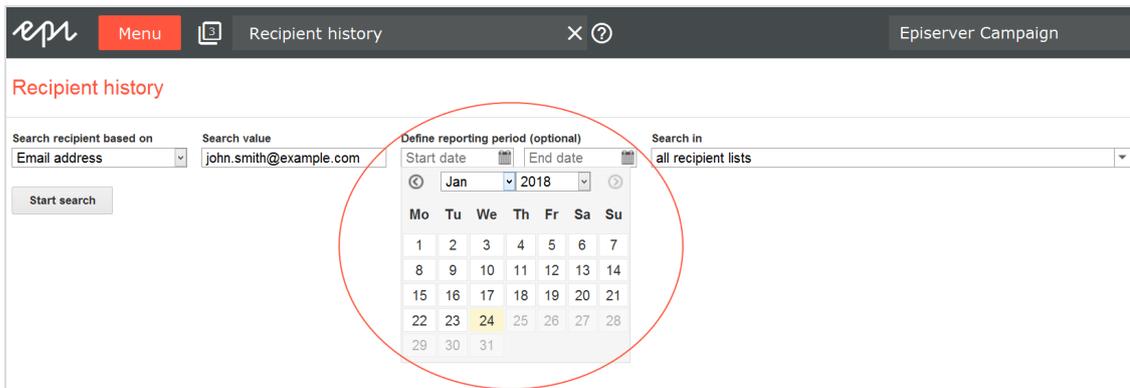
5. By default, recipient lists within the entered data sets for your client is searched. If you want to limit the search to specific recipient lists, use the **Search in** drop-down list and select the check box next to each recipient list you want to search.
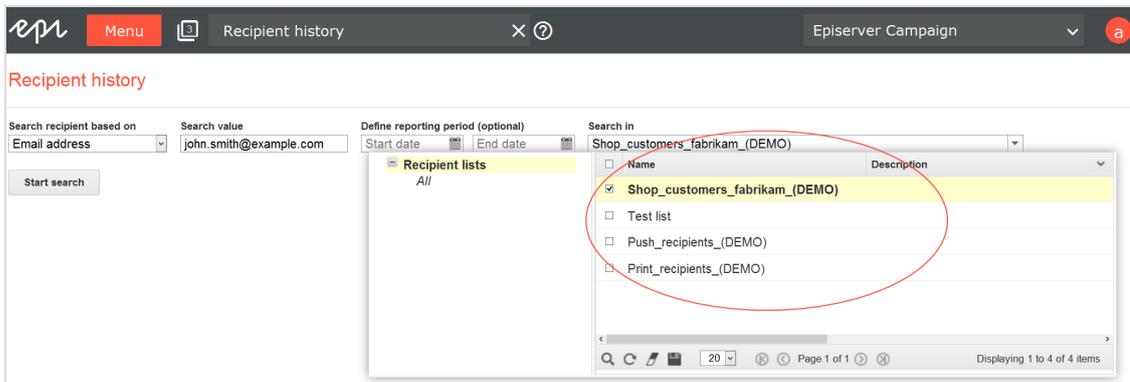
6. When you have completed the fields, click **Start search**.

> **Tip:** The search may take several minutes depending on the number of recipient lists being searched. The message "Loading, please wait..." is displayed at the bottom right in the status bar to indicate that a search is being executed.

When the search has completed, the message history for the recipient is shown. The list starts with the most recent message.

The message history provides the following information:

- recipient ID
- recipient lists in which the recipient can be found
- mailing IDs of messages sent to this recipient
- media types of the messages sent (email, SMS, Mobile Push)
- start times of the messages
- mailing types (regular, special, temporary (test messages) or campaign)
- mailing name
- subject
- send date
- number of openings

- number of clicks in the messages

> **Note:** To display the number of openings and clicks, the users of your client must have permission to view action data. If your users want this permission, contact customer support.

- send status

7. To view the content of a message, click **Show mailing**. Depending on the media type selected, you can select a display option from the drop-down list to the left of the button. For example, if the media type is **Email**, you can choose to display the message as either HTML or plain text.

> **Note:** The current message content is displayed. Older versions cannot be reconstructed. Therefore, the displayed message may differ from the message that a recipient previously received if the message is subsequently modified.

Showing consent history

A *consent* is an email of the mailing type **Confirmation email** in which a recipient provides consent by clicking a confirmation link. The consent has a version and time stamp, so you can see when it was registered.

To access archived consent information:

1. Open the start menu and select **Recipients** > **Recipient history**.
2. Identify recipients for whom you want to view confirmation emails. For example, use the **Email address** criterion to search for a recipient.

3. Under **Message history**, search for a message of the Mailing type **Confirmation email**.
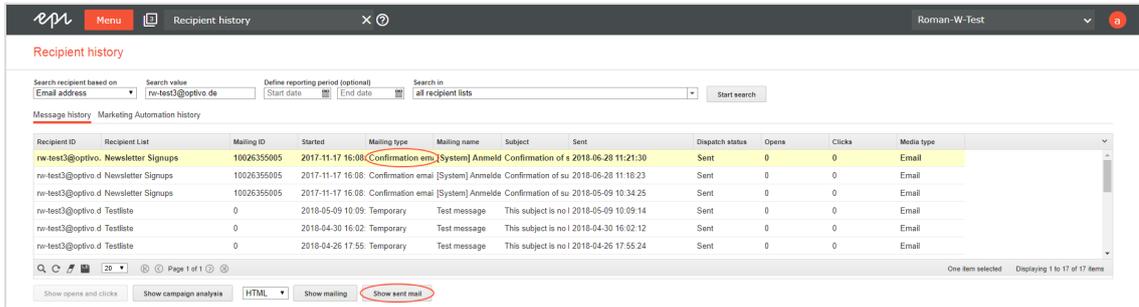
4. Click **Show sent mail**. The consent email appears.
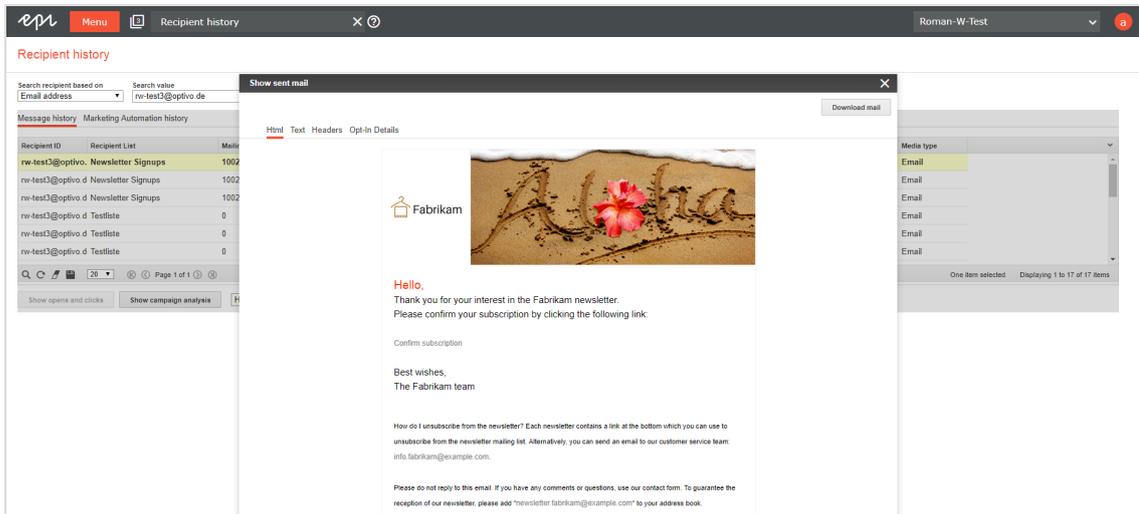
5. Use the **HTML** and **Text** tabs to see the selected email in its HTML and text version as it was sent at the time stated. Click **Header** to get detailed information about the header data of the email. The tab **Opt-in Details** provides information about when the opt-in request was sent and when it was confirmed.
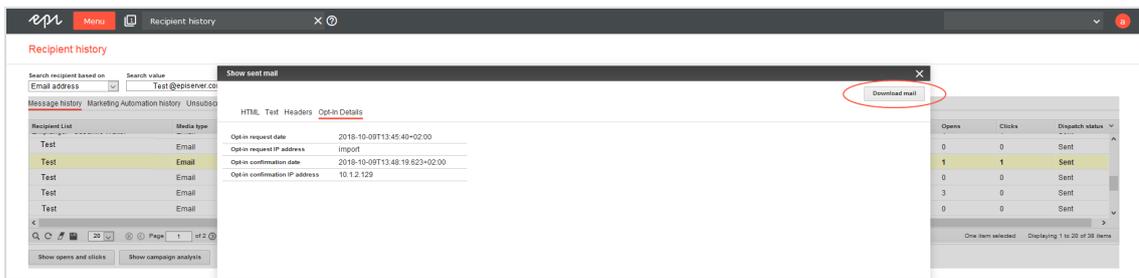
6. Optionally download the consent email.

Showing opening and click behavior

The recipient history can show you the messages that the recipient opened and the links that the recipient clicked in the message.

> **Note:** To display the number of openings and clicks, the users of your client must have permission to view action data. If your users want this permission, contact [customer support](#).

To display the opening and click behavior of recipients for individual messages, perform the following steps:

1. In the **Message history** tab, select the message for which you want to see the opening and click behavior.

    > **Tip:** The number of opens and clicks is shown in the message history list in the **Opens** and **Clicks** columns.

    If opening and click data is available for the selected message, then **Show opens and clicks** is enabled.

2. Click **Show opens and clicks**.

A new list expands showing the action data type (open or click), the time, the mailing name, the mailing ID, which links were clicked, and the media types.

3. To see the message associated with the opening and click behavior, click **Show mailing**. Depending on the media type selected, you can select a display option from the drop-down list to the left of the button. For example, if the media type is **Email**, then you can choose to display the message as HTML or plain text.

Showing campaign analysis

If a message in message history is part of a campaign or Smart Campaign, you can display the associated campaign analysis.

1. In the **Message history** tab, click the message for which you want to view the campaign analysis.
2. Click **Show campaign analysis**.

A new window opens with the campaign analysis, showing the

- net number of recipients
- the bounce rate
- unique unsubscribe rate
- unique opening rate
- unique click rate
- effective unique click rate of the selected campaign
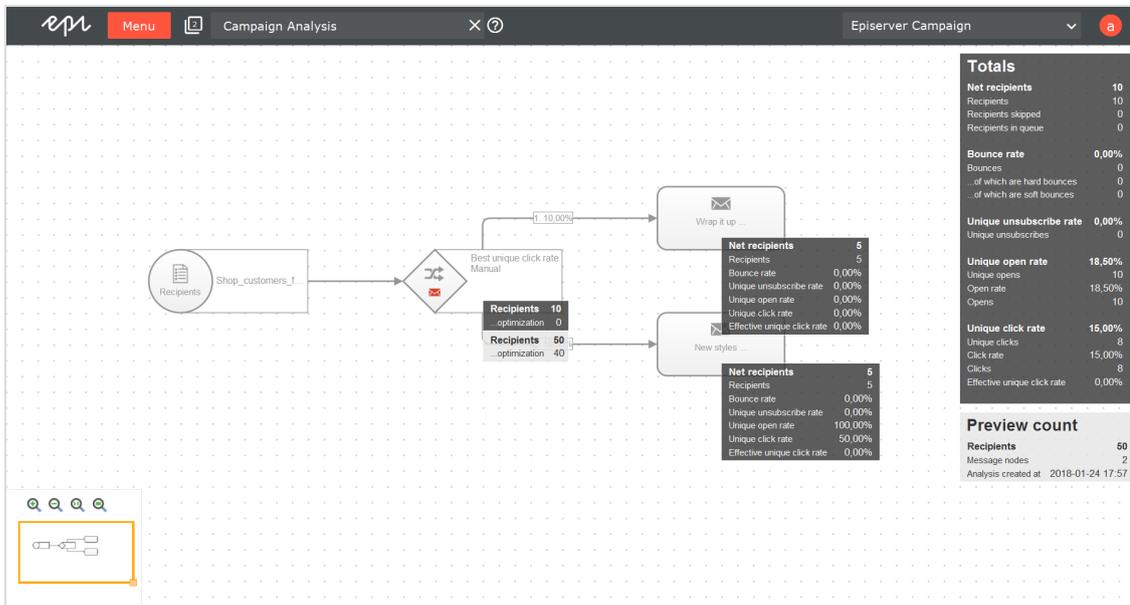
Showing Marketing Automation history

1. Next to the **Message history** tab, click the **Marketing Automation history** tab. The Marketing Automation history is displayed in a list that shows the recipient ID, campaign ID, start date, campaign name, recipient status, and a preview of the history.
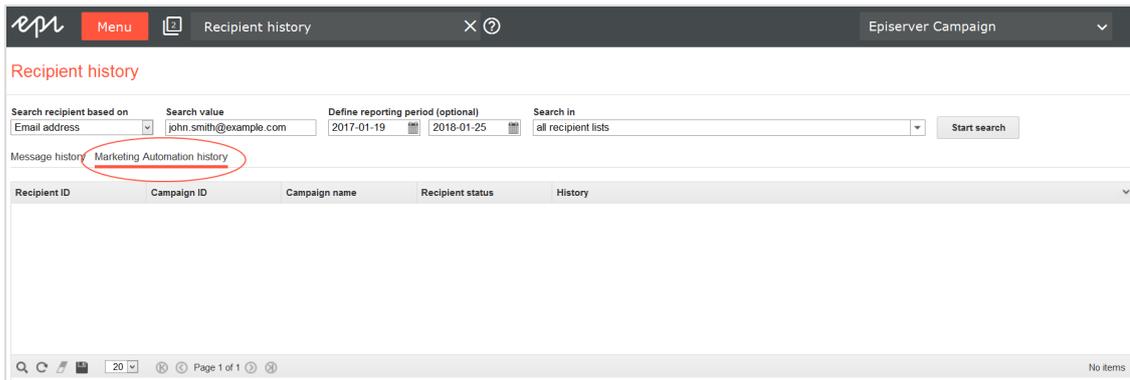
2. To get an ordered overview of the recipient's entire history, select the corresponding Marketing Automation campaign from the list by clicking the entry. The action list for the Marketing Automation campaign opens, showing recipient actions within the Marketing Automation campaign and the associated date.

Display	Event	Example
Started in "…" node #…	The recipient has started in the specified node. The corresponding node ID is shown after the # symbol.	*Started in "New recipient" node #123456789*
Started in campaign "…" (#…)	The recipient is delegated within a campaign to another campaign. The corresponding campaign ID is shown after the # symbol.	*Started in campaign "More offers for you" (#123456789)*
Forwarded to "…" node #…	The recipient is forwarded to the specified node. The corresponding node ID is shown after the # symbol.	*Forwarded to "Wait" node #123456789*
Wait until…	The recipient is waiting or has waited in a **Wait** node until the specified time.	*Wait until 2016-09-01 11:15:31*
… message "…" (#…) sent to recipient	The message is sent to the recipient. The message media type (Email, SMS or Mobile Push), the name of the message and the message ID (after the #) is shown. To view the message content, select the corresponding entry and click **Show mailing**. Depending on the media type selected, you can select a display option from the drop-down list to the left of the button. For example, if the media type is **Email**, you can display the message as HTML or plain text.	*Email message "Welcome" (#123456789) send to recipient*
Message … sent to recipient (details no longer available)	The message is sent to the recipient. The sending time is displayed. Further details cannot be displayed, as these are no longer available. This message usually relates to test messages that were sent and whose content is not permanently stored by Episerver Campaign.	*Message 2016-09-01 11:15:31 sent to recipient (details no longer available)*

Display	Event	Example
completed in node #…	The recipient passed through the campaign and is completed. The corresponding node ID is shown after the # symbol.	*completed in node #123456789*
Not completed in node #…; Error: "…"	The recipient did not pass through the campaign. The corresponding node ID is shown after the # symbol. The error is described.	*Not completed in node #123456789; Error: "the recipient is on the blacklist"*
Recipient edited: …	The recipient is edited in Marketing Automation in the **Change recipient** node. The corresponding change is shown.	*Recipient edited: The value of the "Customer status" field changed to "Premium customer"*
Recipient not modified - Recipient is not in the recipient list "…" (#…) defined in the "Change recipient" node	The recipient has not been edited in the **Change recipient** node because the recipient is not in the specified recipient list. The recipient list ID is shown after the # symbol.	*Recipient not modified - Recipient is not in the recipient list "Existing customers" (#123456789) defined in the "Change recipient" node*
Copied to recipient list "…" (#…)	The recipient has already been copied to the specified recipient list. The recipient list ID is shown after the # symbol.	*Copied to recipient list "Premium customers" (#123456789)*
Recipient not copied – the recipient is already contained in recipient list "…" (#…)	The recipient is not copied to the recipient list because they are already in the specified recipient list. The recipient list ID is shown after the # symbol.	*Recipient not copied – the recipient is already contained in recipient list "Existing customers" (#123456789)*

Display	Event	Example
Recipient not copied – the copy option was not selected	The recipient is started in a parallel Marketing Automation campaign via the **Start in** node. The additional option **First copy to** is not selected.	*Recipient not copied – the copy option was not selected*
Updated in recipient list "…" (#…)	The recipient is copied to a recipient list that has an existing entry for that recipient. The recipient dataset is updated in the target recipient list. The ID of the target recipient list is shown after the #.	*Updated in recipient list "Existing customers" (#123456789)*
Updated in recipient list "…" (#…(and deleted in "…" (#…)	The recipient is copied to a recipient list that has an existing entry for that recipient. The recipient dataset is updated in the target recipient list. The recipient dataset is deleted from the source recipient list. The names and ID (after the #) for the corresponding recipient lists are shown.	*Updated in recipient list "Active customers" (#123456789) and deleted in "Inactive customers" (#1122334455)*
Matched target group "…" (#…)	The recipient is assigned to a target group. The ID of the target group is shown after the #.	*Matched target group "Women" (#123456789)*

Showing the third-party ID

In the **Third-party ID** tab, you can find the pseudonymized ID of the selected recipient.

To view the third-party ID, click **Third-party ID** next to **Marketing Automation history**.
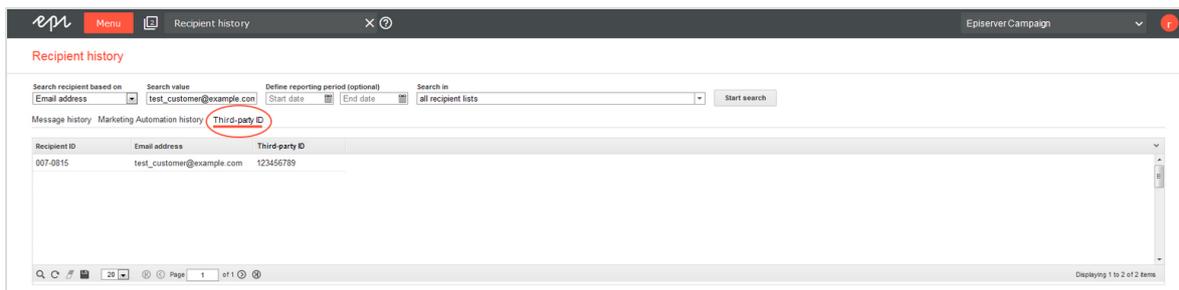
The **Third-party ID** tab provides the following information:

- **Recipient ID**. ID of the recipient selected in **Search recipient based on**.
- **Email address**. Email address of the recipient.
- **Third-party ID**. Pseudonymized ID of the recipient.

Exporting mailing and performance data

> **Note:** Contact customer support to activate this feature.

This add-on lets you export mailing and performance data to further process it in an external system. The data is exported to a CSV or XML file.

The export runs at a defined interval, such as daily at midnight or once a week. You can download exported data via SFTP from a secure server.

Click profiles

Link tracking is the most important tool for measuring the performance of campaigns and creating customized remailings. Click profiling creates target groups and allows reports to be generated. The clicks users make are the basis of click profiling. For example, email recipients who frequently click Blu-ray offers can be segmented via a click profile then supplied with targeted and highly relevant information.

Click profiling lets you create profiles – manually or automatically and independent of individual mailings or links – that are associated with the tracked links in your mailings. When created, tracking links are tagged.

> **Tip:** Click profiling complements tracking link management – and its functions remain preserved. You can still edit links in a mailing individually via the **Tracking** tab in the **Edit mailing** wizard. Determine whether the link in the HTML and text version should be tracked and enter a description of the link.

To start the function, open the start menu > **Recipients** > **Click profiles**. The profiles are displayed.

Creating and editing click profiles

1. Click **Create**.

   Optionally, in the **Folder** drop-down list, select a folder in which to save the new profile.

2. Enter a name and an optional description.
3. Click **Finish**.

To edit a click profile, select it from the list and click **Edit**.

To assign links to the newly created profile, see Assigning click profiles.

To create a rule-based profile and automatically assign links, see Assigning rule-based click profiles automatically.

Assigning click profiles

1. To assign links manually to one or more click profiles, open the start menu > **Recipients** > **Click profiles**.
2. Select the desired click profiles and click **Assign**.
3. In the **Assign click profiles** window, in the **Mailings** drop-down list, select one ore more mailings to display links from these mailings in the **Tracking links** list.
4. In the **Tracking links** list, select one or more links that you want to assign to a profile. The **Click profiles** drop-down list below this list shows profiles. If you already selected a profile in the overview window, it is displayed.
5. You can change, add or remove profiles.

   > **Tip:** Both drop-down lists in this window let you select multiple items.

6. To save the assigned links, click **Add**.

Removing an assigned click profile

1. In the **Click profiles** window, click **Assign** and select one or more mailings.
2. Select a link.
3. Click **Remove** to unassign the profiles from that link. Automatically assigned profiles cannot be removed.

   > **Tip:** If you unassign a profile, it is only removed from the link. The profile itself cannot be deleted.

Assigning click profiles when editing a mailing

1. From the list in the **Tracking** tab, select a link and click in the **Profiles** field.
2. Select one or more profiles from the selection window and click **OK**.

If you use a mailing template that is configured accordingly, you see a **Click profiles** tab in the editor window of a paragraph. To assign a profile to links of a paragraph, select the check box next to the desired profile.

> ### Tip: Manually assign rule-based profiles
>
> You also can assign rule-based profiles manually to a link that does not match the rule using the function described in the previous paragraph. These links may be considered the exceptions to the rule. Reciprocally, rule-based profiles cannot be removed from a link that does match the rule.

Rule-based assignment

Rule-based click profiles automatically assign tracking links. To enable this, the link URL is analyzed according to the character strings it contains or on the basis of regular expressions. The rules for automatic assignment are configured during the creation or editing of a click profile. Two fields are allocated for this purpose.

- **Rule**. Contains details of the character string the URL of a link must contain, or what rules the construction of a URL must follow, so that a profile can be assigned. You can use wildcards (?, *) to track link URLs with specific recurring character sequences to be categorized. You can also use regular expressions.
- **Rule type**. The rule and rule type must match together for rule-based assignments to function.

Test rule-based click profiles to ensure the desired result is achieved. Rule-based click profiles can be adjusted at any time, and assignments are automatically updated.

> **Tip:** Rule-based assignments cannot be removed. If you change a rule, assignments are updated. This means that links that are no longer applicable will are not shown in the corresponding profile.

Wilcard example

The following link is to be analyzed with a wildcard click profile:

```
www.example.com/new_article/xy/ref=1234
```

If tracking links to the newest articles in your online shop contain `.../new_article/...` in the URL, you would formulate the following wildcard rule to automatically tag the link:

```
*/new_article/*
```

Regular expression example

Regular expressions let you formulate sets and subsets of character strings with the help of syntactic rules. For example, you can define that a URL contains or does not contain specific characters. Regular expressions also allow the filtering of number ranges. They treat URLs as a character sequence (string) and analyze them according to the formal criteria of the regular expression.

The following link is to be analyzed with a regular expression. In contrast to the URL in the previous example, this link does not contain a section that can be analyzed using a rule. But you can solve the problem using a number range filter:

```
www.example.com/xy/ref=1234
```

In this case, the regular expression examines letter code and the article reference:

```
.*[x-z][x-z]/ref=12[0-9][0-9]
```

- A dot and an asterisk (`.*`) stand for any characters.
- Square brackets (`[]`) denote a range. In this case, the letters x, y, or z can be in the first or second position.

   - The expression filters xx, xy, xz, yx, yy, yz, zx, zy and zz.
   - This expression filters numbers from 1200 to 1299. The first two numerals must be 1 or 2. The numerals in third or fourth place can range from 0-9. Four numerals must exist.

Returned emails

Returned emails are sent back to the sending email server (in this case, the Episerver Campaign server) for various reasons.

Returned emails are classified by filters. In the **Type of returned emails** drop-down list, you can select to show autoresponders, hard bounces, soft bounces, replies, or types. Hard bounces, soft bounces, and autoresponders are shown for the sake of completeness. There is no need for action on your part, as Episerver Campaign automatically takes care of them.

To display returned emails, perform the following steps:

1. Open the start menu > **Returned emails** > **Overview**.
2. Click the **Mailings** box.
3. Select one or more mailings.

4. Click **OK**.

5. In the **Type of returned email** list, click the type of returned emails to display.

- **All**. Returned email from all categories.
- **Hard Bounce**. Unreachable email addresses. This occur if recipients change providers/web mailers. You should not manually erase these recipients because Episerver Campaign stops sending them emails after the third hard bounce. This threshold can be altered for your account/client.
- **Soft Bounce**. Temporarily unavailable email accounts. This can occur if a recipient mailbox reaches its capacity, and can only accept new email after some is deleted. You should not manually edit soft bounces because the addresses may be reachable again.
- **Autoresponder**. Automatic reply email, such as *On holiday until May 26*.
- **Reply**. Replies from mailing recipients. The standard Episerver Campaign setting is that such replies are not sent to you but to the system. If you want to receive these replies in your email account, contact [customer support](#).

> **Tip: Filters for the type of returned email**
>
> Episerver Campaign filters are set to specify a returned email with maximum likelihood as a hard bounce, soft bounce, or autoresponder. If an email cannot be assigned to one of these categories, it is moved to the Reply category so that no real reply is lost. You may find autoresponders and undelivered email in this category.

- **Spam**. Spammers do not send from their own mail servers but from computers of unsuspecting users. Worms or Trojans (malware) infiltrate user's computers, where they can be misused to send spam. If your mailing is sent to a recipient whose computer is infiltrated, it automatically sends spam to the mailing return address. The Episerver Campaign server's spam filter places the spam in the spam category.

6. Click **Show**. The **Overview** area displays returned emails.

- **Received** column. The sending date of the email. Bounces and autoresponders are usually sent the same day the mailing is sent. Responses can be sent several days afterwards.
- **Type** column. The returned email type.
- **Recipient** column. The sender of the email.
- **Recipient Details** tab. Details of a returned email, including email address, recipient registration date, and other data.
- **Display reply**. To display the text of the email of the recipient:
  a. Click the **Reply** tab.
  b. Click **Open in new window** to increase the size.
  c. Click **Print**. The browser's print dialog box opens automatically.
  d. Confirm the print dialog.

Blacklist overview

When a recipient is placed on a blacklist, the recipient will receive no more mail from you via Episerver Campaign, even if the recipient registers to receive mailings again. To reverse this status, remove the recipient from the blacklist.

To display the blacklist, open the start menu > **Blacklist** > **Overview**. You can perform the following actions for the blacklist.

Adding a recipient to a blacklist

1. Click **Add**. A blank line is added to the list.
2. Enter the email address of a recipient.
3. You may enter a reason for blacklisting (for example, complaint).
4. Click **Apply**.

Adding to a blacklist automatically

If a recipient marks an unwanted email as spam, Episerver Campaign is notified by the email service provider, and the recipient is added to the blacklist. This ensures that your recipient lists have no dissatisfied recipients. And, a clean recipient list with just a few complaints has a positive impact on the deliverability of your mailings.

Typical reason of a blacklist entry:

```
type=automatic;rule=FBL: AOL;mailing=12345678;m2u=987654321
```

Editing a blacklist entry

1. To change the reason for blocking, click the entry you want to edit.
2. Click **Edit**.
3. Edit the content of the **Reason** box.
4. Click **Apply**.

Deleting a blacklist entry

1. Click the entry you want to remove from the blacklist.
2. Click **Delete**.

3. Confirm the deletion. The recipient is deleted from the blacklist and can receive your mailings again.

Using wildcards

Instead of entering a complete email address, you can use wildcards in the blacklist entries.

- Use the asterisk (*) as placeholder for one or more characters. For example, to block email addresses from a specific domain such as *example.com*, specify `*@example.com`.

  > **Note:** Searching the blacklist may result in multiple entries. For example, *axel@example.com* and **@example.com* may both be on the blacklist. If *axel@example.com* is removed from the blacklist, Axel would still not receive mails because the *example.com* domain is blocked.

- Use the question mark (?) as placeholder for a single character. For example, you are not sure about how a name is spelled correctly, such as `Mar?` for *Mark*, *Marc*, or *Mary*.
- You can use placeholders in the domain part of an email address. For example, `abuse@*` blocks email addresses starting with *abuse*. This account name is usually configured by companies and providers as a default email account for customer complaints. If somebody registers for your newsletter with such an email address, it can be both annoying and cause serial problems and damage your internet reputation.

Importing blacklists

When you initially import recipients into Episerver Campaign, or if you frequently import recipients from a local list, you should also import a blacklist. This function lets you import a CSV file with blacklisted recipients or wildcard blacklist entries into your client. A blacklist entry can be a complete email address or contain placeholders. See also: Wildcards.

To import a blacklist, perform the following steps:

Prerequisite: A CSV file that contains blacklist entries.

1. Open the start menu > **Blacklist** > **Import**.
2. Click **Browse…** and select a CSV file from your computer that contains the blacklist entries.
3. Click **Import options**. The **Preview** area shows entries encountered in the CSV file. The **Rule** column must contain the respective email addresses or wildcards to be blacklisted. Only this first column is imported.
4. If the columns are not displayed correctly, select an encoding type from the **File charset** list by changing the separator and escape characters.
5. If the first line of the CSV file contains a table head with column designations, select **Yes** in the **Skip first row** drop-down list.
6. Click **Refresh preview** to check your settings.

7. Click **Reason**. Optionally, you can enter a reason for blacklisting the imported entries. The reason you enter here applies to all imported entries.

8. Click **Finished**.

Importing and exporting a blacklist

> **Note:** Contact <u>customer support</u> to activate this feature.

This add-on automatically imports a CSV file to update the blacklist entries. The file is transmitted via SCP (Secure Copy Protocol) and stored on a server provided by Episerver. The import to your client is handled automatically. You receive a success notification after each import. The import does not delete existing blacklist entries.

The automatic blacklist export writes blacklist entries to a CSV file and stores it on a server provided by Episerver. You can download it automatically or manually from this server.

You can configure import and export separately.

Cleaning up blacklists

> **Note:** This function deletes blacklist entries by reason. If you want to delete a single email address or a blacklist rule (wildcard), use the **delete entry** function.

To remove blacklist entries, perform the following steps:

1. Open the start menu > **Blacklist** > **Cleanup**.
2. In the **Reason** field, enter the reason why you want to delete entries, such as *complaint*. Use the asterisk *** placeholder for multiple characters, and a question mark **?** for a single character.
3. Click **Count** to see how many entries with this reason exist.
4. Click **Confirm deletion**.
5. Click **Delete blacklist entries**.

Custom blacklists

> **Note:** Contact <u>customer support</u> to activate this feature.

This optional feature allows you to exclude mailing recipients who are not part of the global blacklist.

You can create up to three custom blacklists by default and fill them manually or via CSV data import. Then, use a **Block node** to add custom blacklists to a campaign. As a result, you specify which recipients besides the global blacklist should not receive a mailing.

Creating a custom blacklist

1. Open the start menu > **Blacklist** > **Custom blacklists**.
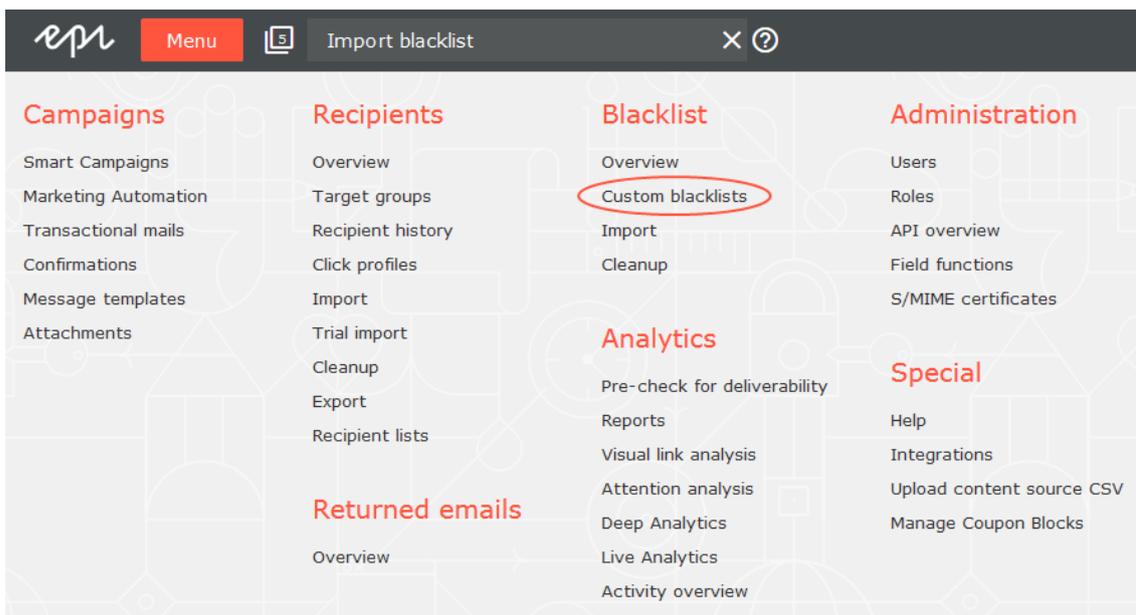
2. Click **Create**.

3. Enter a name for the custom blacklist.

4. Select one of the hash algorithms supported by Episerver Campaign. If the entries in your blacklist don't use hash algorithms, select **None**.

> **Note:** As long as your custom blacklist is empty, you may change the hash algorithm anytime.
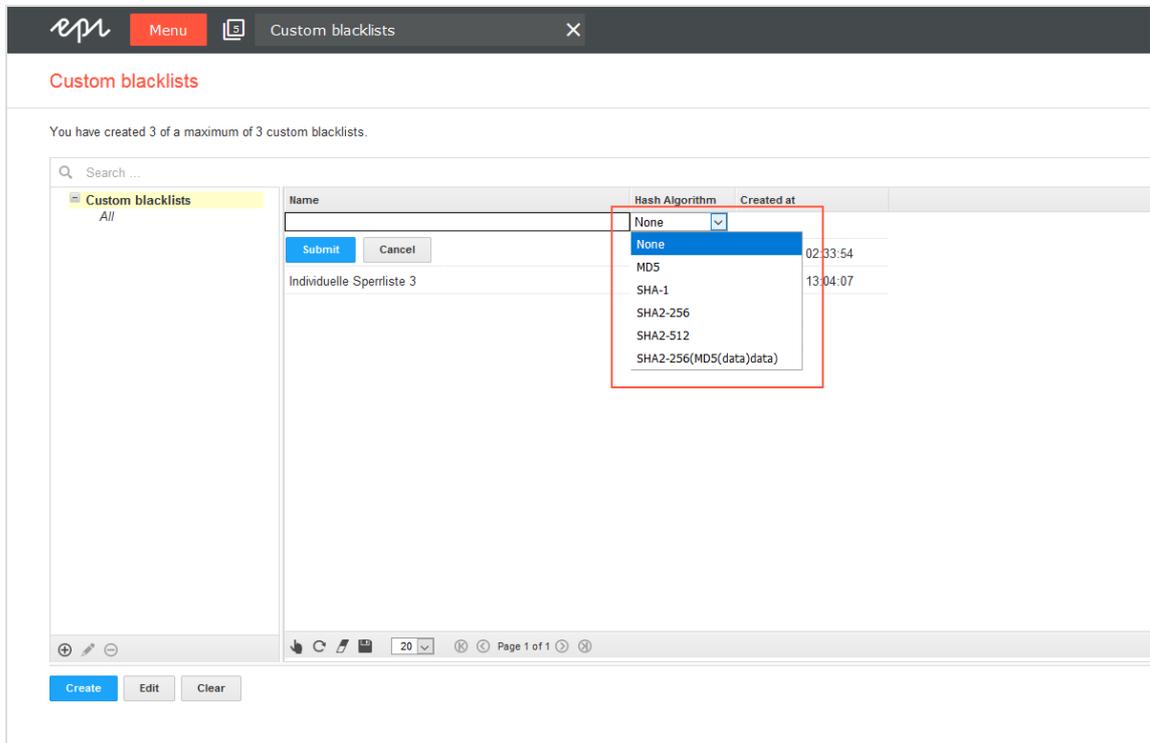
5. Click **Submit** to create the custom blacklist.

> **Note:** You can delete all entries in a custom blacklist by clicking **Clear**.

Adding and editing recipients manually

1. Open the start menu > **Blacklist** > **Overview**.
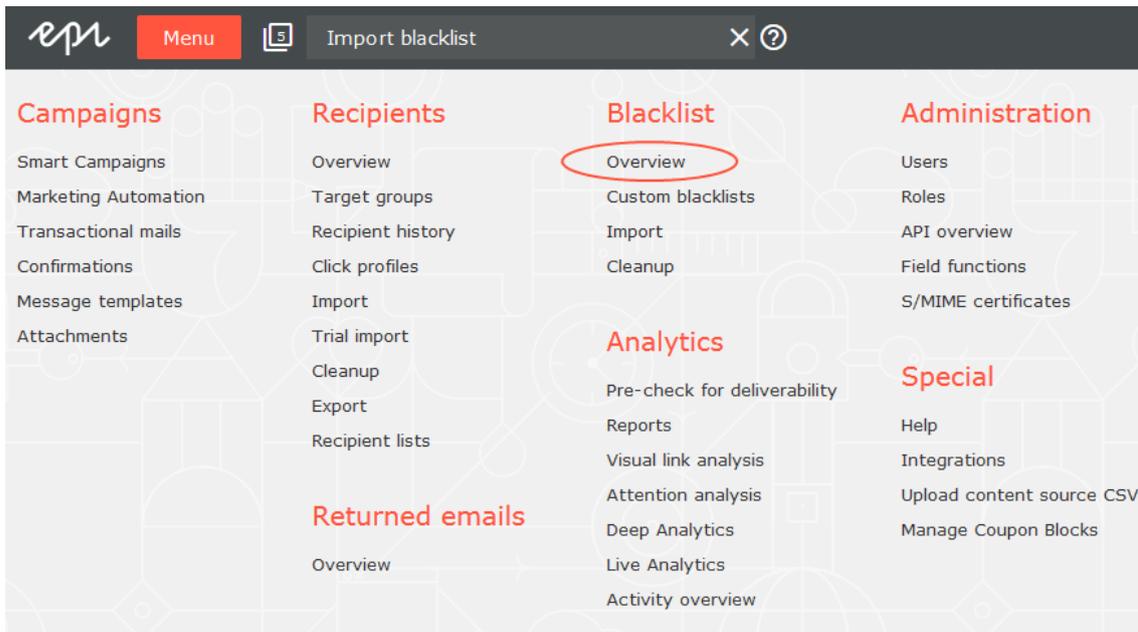
2. Under **Blacklist selection**, click **Custom blacklist** and select the blacklist you want to edit.
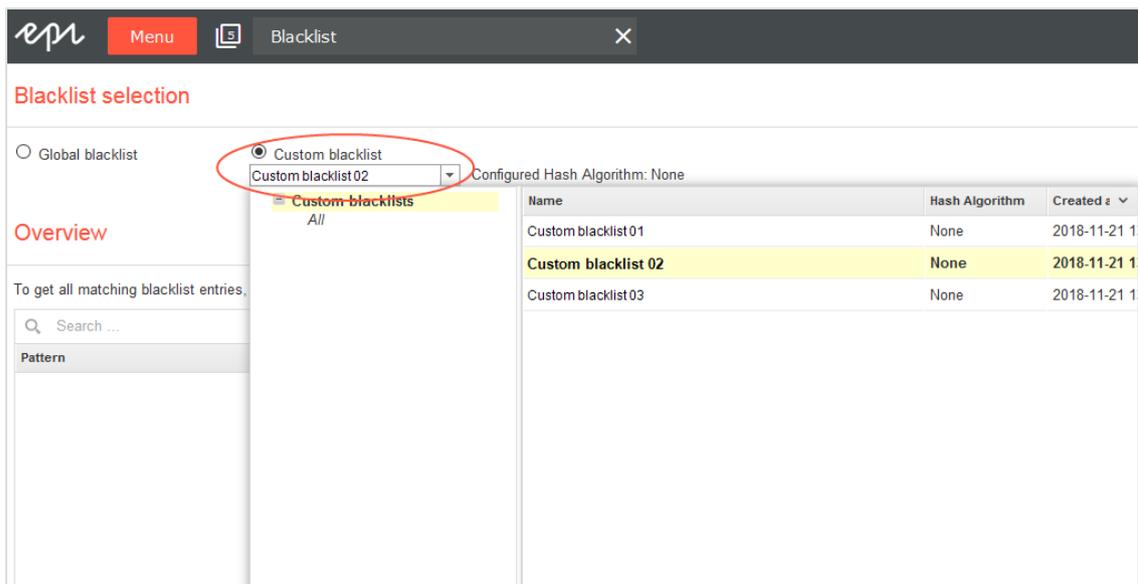
3. Edit the custom blacklist by clicking the **Add**, **Edit** and **Delete** buttons. For more information, see **Blacklist overview**.

Importing blacklists

To import entries from a CSV file into a custom blacklist, perform the following steps.

1. Open the start menu > **Blacklist** > **Import**.
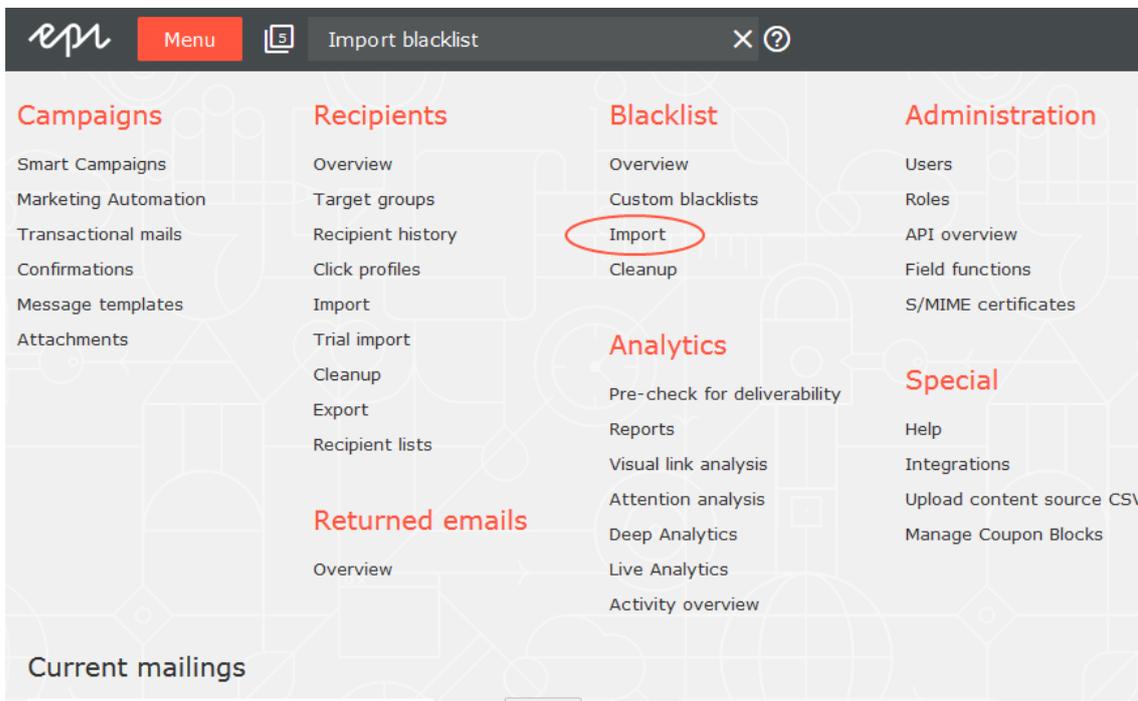
2. Under **Upload**, click the **Browse…** button and select a CSV file on your local hard disk.
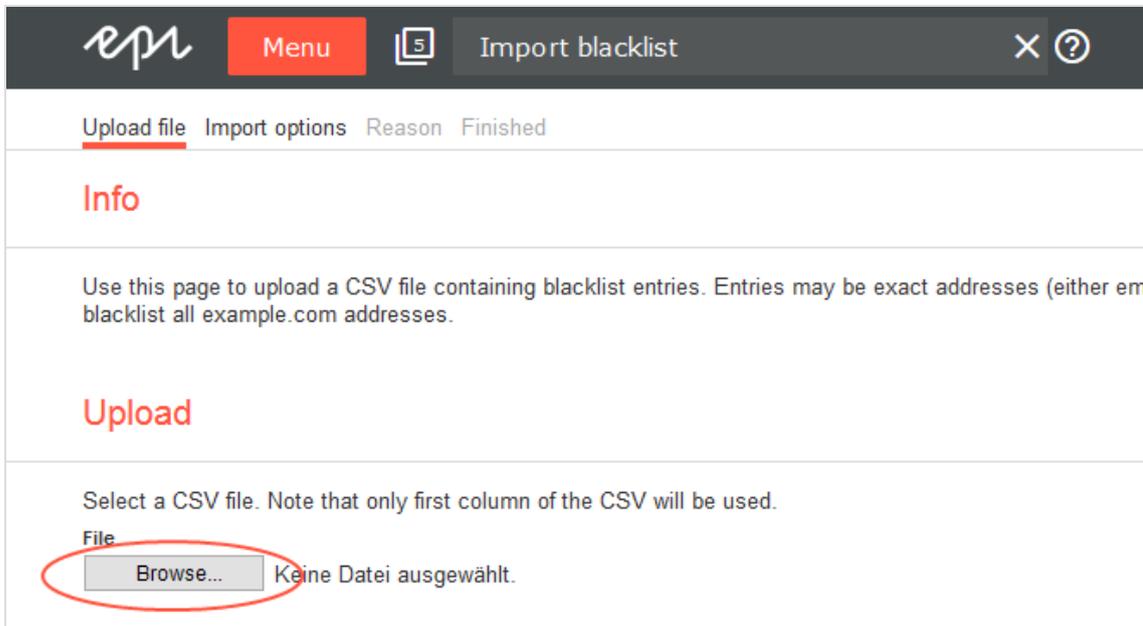
3. Click **Import options** to upload the file.

4. Under **Blacklist selection**, click **Custom blacklist**.

5. Select the custom blacklist to which you want to import the CSV file.
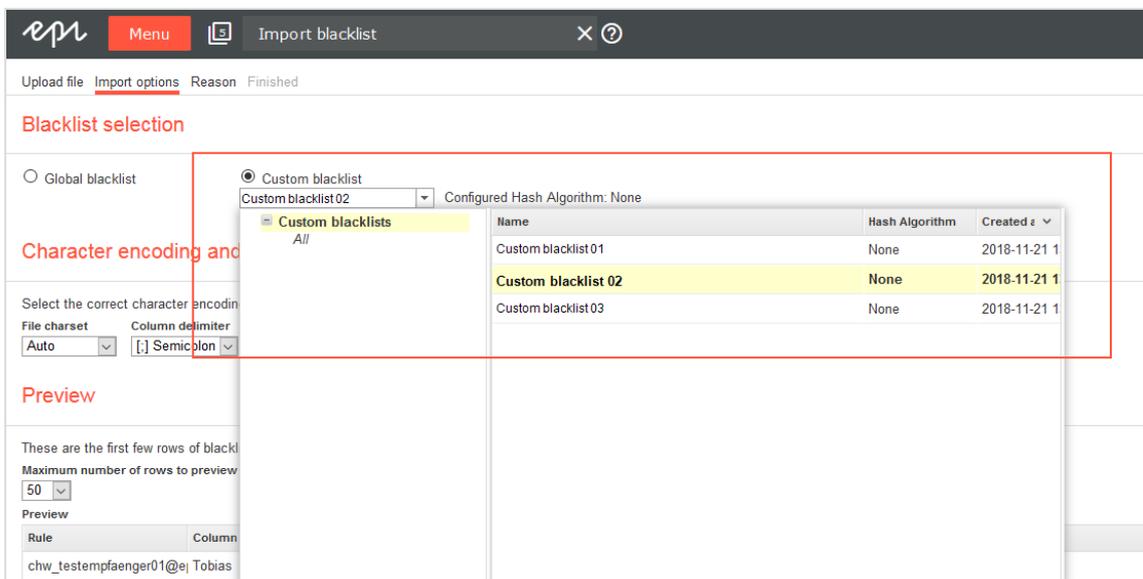
6. Under **Specify the hash algorithm used in the import file**, select your CSV file's hash algorithm. Select **None** if your CSV file entries use no hash algorithm.

> **Note:** The CSV file's hash algorithm must match the hash algorithm of the selected blacklist. If not, an error appears. Correct your selection under **Specify the hash algorithm used in the import file**. Or, under **Custom blacklists**, change the hash algorithm of the custom blacklist. You may also create a new custom blacklist with the correct hash algorithm.

7. Under **Character encoding and CSV options**, you can change CSV file options. For more information, see Import blacklists.
8. Click the **Reason** button. You can optionally enter a reason for blacklisting the imported entries. The reason applies to all imported entries.
9. Click **Finished**.

Changing email addresses

> **Note:** Contact customer support to activate this feature.

Usually, the email address is used as a unique ID to identify a recipient. Episerver Campaign uses this unique ID in various functions carried out during recipient import, mailing dispatch. and so on. Therefore, you cannot

change a recipient's email address. However, customer support can supply an add-on that lets you change a recipient's email address in sub-clients.

Exporting recipients by category

> **Note:** Contact customer support to activate this feature.

This function lets you automatically export recipient data by category into CSV files.

- Active recipients
- Blacklisted recipients
- Post-clicks (requires web analytics software with an export function)
- Recipients that exceeded the bounce limit

An individual CSV file is created for each category. Alternatively, you can create a multiple lists with flags for each category.

Importing recipients by category

> **Note:** Contact customer support to activate this feature.

If you maintain distribution lists in an external system, this add-on lets you synchronize your external distribution list with Episerver Campaign recipient lists. The add-on lets you automatically import recipients into your client.

You can import the following categories in individual CSV files or as multiple lists with markers for each category:

- Recipients
- Unsubscribers
- Blocked recipients
- Post-clicks (requires a web analysis program with an export function)

Preference Center

You should develop a broad-based lifecycle marketing strategy. The Preference Center can be an important element in such a strategy or serve as the first step in generating data that can later be used for lifecycle marketing campaigns.

The Preference Center lets recipients set their own preferences and supply personal information. Do this through a form that you incorporate into your web presence as a standalone element, or integrate into a template using an iFrame.

Recipients can access the page via a website link or in a mailing, then edit their personal information. The information is transferred by **HTTP API** or **SOAP API** to Episerver Campaign and stored in the recipient data.

The Preference Center can also help you design tailor-made mailings. For example, you can request information about a recipient's interests, offer a variety of topics (channels), and let the recipient choose the frequency of receiving mailings.

What data is requested and its purpose

Data that a recipient enters in his/her profile is considered voluntarily disclosed personal information. As long as this information is submitted voluntarily and not disclosed to third parties, there is no limit on the type of data you can request. The recipient should readily understand why the information that is being requested and, as a result, be willing to provide it. Minimizing data collection also means that you should only request information that you need and that serves to optimize the service you are providing to the recipient. See also: **Legal compliance**.

If you are already conducting email marketing through Episerver Campaign, you can use the recipient lists in your client to see what recipient-based data is currently available. Users can edit this data in the Preference Center.

To optimize the content of your mailings, recipients should be provided with additional options. For example, you may want to furnish a listing of various areas of interest and allow the recipient to select one or more. Alternatively, you could offer several channels for the recipient to subscribe to. Through dynamic marketing, you can place specific content in mailings associated with each channel, content that only subscribers to those channels receive, while withholding content from channels to which the recipient has not subscribed.

Legal compliance

The data protection notice must contain information about the collection, storage, use and transfer of data. It must also reference the user's right to have data deleted and the obligation of the party collecting the data to

provide information about that data. The text of a data protection notice need not be included on the form page itself. You can include a link to the appropriate page.

Although not mandatory, you should emphasize that none of the information collected is disclosed to third parties. The same applies to notifications about data security protection.

In email marketing, collect data from required email address fields *only* if it is essential for the purpose of distributing mailings; other fields, like **Recipient name**, should not be required. You should indicate the purpose for which personal information collected through the Preference Center is used. For example, you should emphasize that names are collected solely for the purpose of personalizing mailings. If you request address information, indicate that it is collected to provide news about offers limited to a specific geographic area and so on. There are no limits on the information you can collect except for email addresses and information must be provided voluntarily.

Exchanging data

The exchange of data between the Preference Center and Episerver Campaign is carried out via SOAP API. When a recipient opens the Preference Center through a mailing, the recipient ID is transmitted and the recipient data contained in the Episerver Campaign database is imported. When the recipient edits his/her profile, the updated data is transmitted back to Episerver Campaign via SOAP API.

> **Note:** You can also use HTTP API for the Preference Center except that you cannot import recipient data into a web form. For example, you can forward the mailing ID and recipient ID (usually the email address) from a mailing, and record the recipient data in the database, but the recipient cannot view his/her old data.

If you link to the Preference Center from your website, you cannot identify the recipient ID. In this case, the recipient must first enter a recipient ID (usually the email address). The same rule applies: If you are using SOAP API, you can import recipient data, which you cannot do using HTTP API.

Configuring Preference Center form fields

Depending on the type of fields used, you can configure the Preference Center form fields in different ways. Fields into which text is entered are set up as text fields. These include the fields **Email Address** and **Name**. You can set up fields with fixed values as lists or check boxes. Fields that list interests or topics should allow for multiple selections. If only a single item may be selected (such as frequency of mailings), use either a drop-down list or a radio button. The available fields are:

Caption	Type	Required field	Standard
Email address (required)	single-line text field	✓	—

Caption	Type	Required field	Standard
Last name	single-line text field	✘	—
First name	single-line text field	✘	—
Salutation	radio button, drop-down list	✘	—
Date of birth	data field with selection window	✘	—
Age	drop-down list (for example, B. 20-30, 30-40)	✘	—
Interests	list with check boxes	✘	—
Mailing frequency (standard)	radio buttons (for example, weekly, bi-weekly, monthly)	✘	yes
Other fields, as requested	radio buttons, text fields, drop-down lists, check boxes	✘	—

Displaying error messages

Error messages should appear as text directly above/alongside/beneath the applicable form. Alternatively, these messages may also appear at the top of the page, referencing the applicable field. The field being referenced should be highlighted in color. The following provides several sample error messages:

Error	Error message
No email address entered	*Please enter an email address.*
Consent not provided	*You must indicate that you want to receive this newsletter.*
Required information not entered	*Please complete all required fields.*

Design/templates tips

Keep form pages simple and clearly arranged. Ideally, the user should not have to scroll to reach the bottom of a page. Fields in a form and the **Send** button should be arranged to display on standard screens and in commonly used font sizes without using the scroll bar.

Example: Preference Center of a tourist enterprise

If Episerver creates and integrates a Preference Center for you, it is set up as a separate page. You can link directly to this page or integrate it into a template using an iframe. If you choose the latter option, you need to coordinate page width and height with customer support to make sure the content displays correctly.

To create a web form, provide Episerver with a template in HTML format or a layout template and the accompanying error messages.

Security tips

Password protection

To protect recipient data from misuse, access to the Preference Center must be password protected. Make sure that users can only access the Preference Center (their data) after they verify authorization.

Changing email addresses

To prevent misuse, users should not be able to freely change their email address. The procedure used for changing email addresses could look like the following:

1. The recipient enters a new email address, which is saved temporarily.
2. A double opt-in process is initiated for the new email address.
3. The address is changed only after the recipient confirms the change. If not confirmed, the original email address is restored.

Analytics

This section describes Episerver Campaign's analysis tools to gather statistics after dispatch, or check and optimize your mailings before you send them. If you want to use third-party analysis tools, see Web analytics integrations.

- **Performance Dashboard (Beta)**. Create a graphical overview of your marketing activities.
- **Deep Analytics**. Create cross-client analyses with more than 30 measurement variables.
- **Reports**. Analyze mailing statistics.
- **Live Analytics**. Create RFM analyses.
- **Deliverability preview**. Check displays and spam suspicion with the most important email providers before dispatch.
- **Post-click tracking**. Analyze actions of recipients on your website.
- **Visual link analysis**. Graphically display link clicks.
- **Visual link analysis of post-clicks**. Graphically display sales volume and number of orders generated via a link.
- **Attention analysis**. Create heat maps.
- **Activity overview**. Display marketing activities within a defined period.

Performance Dashboard (Beta)

The Performance Dashboard gives you an overview of your mailing activities. Customize the Performance Dashboard and use it for example for graphically appealing presentations.

To open the Performance Dashboard, go to start menu > **Analytics** > **Performance Dashboard (Beta)**.

> **Tip:** All users of a client have the same access permission to the Performance Dashboard.

You can display the following widgets in the Performance Dashboard:

- **KPI chart (time-based).** A simple diagram to illustrate a KPI. KPI charts consist of a graphically highlighted key figure and a diagram behind it.
- **Basic chart (time-based)**. Has more configuration options than a KPI chart and is especially suitable for analysis and comparison of different KPIs (2 dimensions).
- **Basic chart (mailing-based)**. Two-dimensional basic chart that, unlike the time-based basic chart, allows analysis based on selected mailings.
- **Bubble chart (mailing-based)**. Display of different KPIs as colored bubbles (3 dimensions).

By default, the following widgets are displayed:

1. KPI charts *Recipients*, *Opens*, *Clicks*, *Returned emails* and *Unsubscribes*
2. Basic chart *Dispatch overview* with a complete overview of all KPIs
3. Basic chart *Clicks, returned emails and unsubscribes*
4. Basic chart *Unsubscribes*
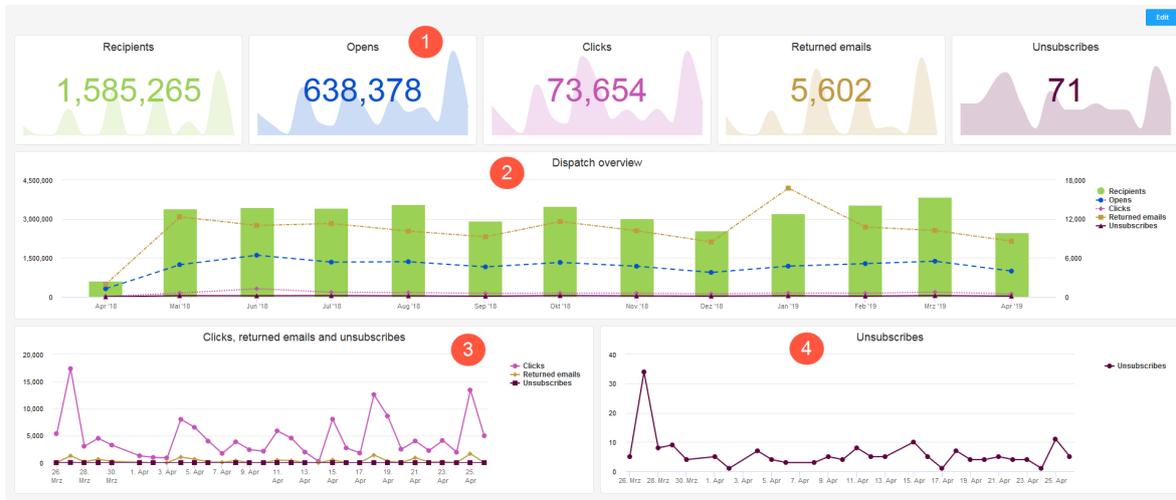
You can **customize and export** each widget directly in the Performance Dashboard overview or configure it individually in **edit mode**.

> **Tip:** Hover over a specific day or mailing in the graph to view the corresponding KPIs and metrics.

Widget features

You can customize the chart settings of each widget directly in the Performance Dashboard to **show or hide data series**, **set time periods**, and **zoom in on areas**. You can also **export widgets** as an image file, PDF or CSV.

Showing or hiding data series

> **Note:** This function is not available for the widget type *KPI chart*.

To show or hide series in diagrams with several KPIs, click on the respective series titles in the right list.
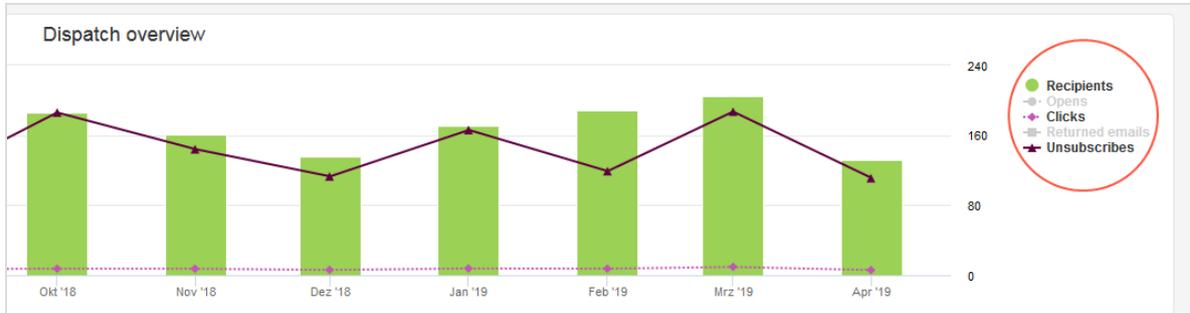
Setting time periods

> **Note:** This function is only available for widget types *KPI chart* and *Basic chart (time-based)*.

The KPIs displayed in the widgets *KPI chart* and *Basic chart (time-based)* are absolute values and refer to all messages of a client in the selected time period.

To set the time period:

1. Hover over the widget for which you want to change the time period. A drop-down list appears.
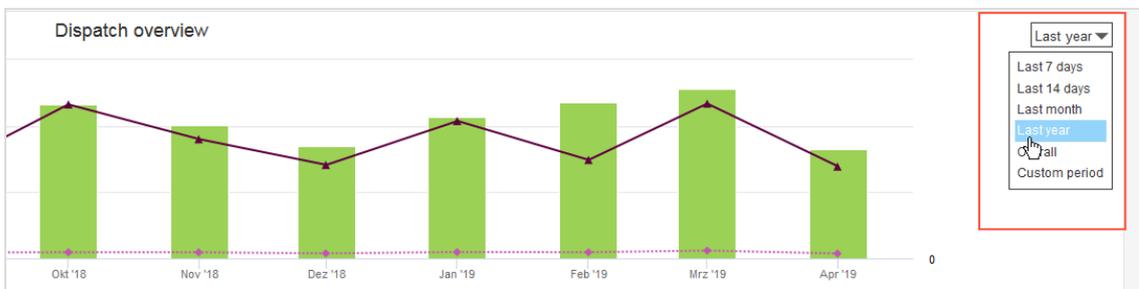
2. Select one of the following options:
   - **Last 7 days**. Data source are the last seven days.
   - **Last 14 days**. Data source are the last 14 days.
   - **Last month**. Data source is the last month. Example: On April 17, the period goes back to March 17.
   - **Last year**. Data source is the entire last year. Example: On April 17, 2019, the period goes back to April 17, 2018.
   - **Overall**. Data source is the entire period recorded in the client.
   - **Custom period**. Define a time period.

Zoom

> **Note:** This function is not available for the widget type *KPI chart*.

The zoom function lets you zoom in on areas in the widget type *Basic chart*, and enlarge and display bubbles more precisely in the widget type *Bubble chart*.

To use the zoom function:

1. Move the cursor to the start or end point where you want to zoom in.
2. Hold the left mouse button and move to the left or right to define the area you want to zoom in.

3. Repeat step 2 to zoom in closer.
4. Click **Reset Zoom** to reset the chart to the original setting.
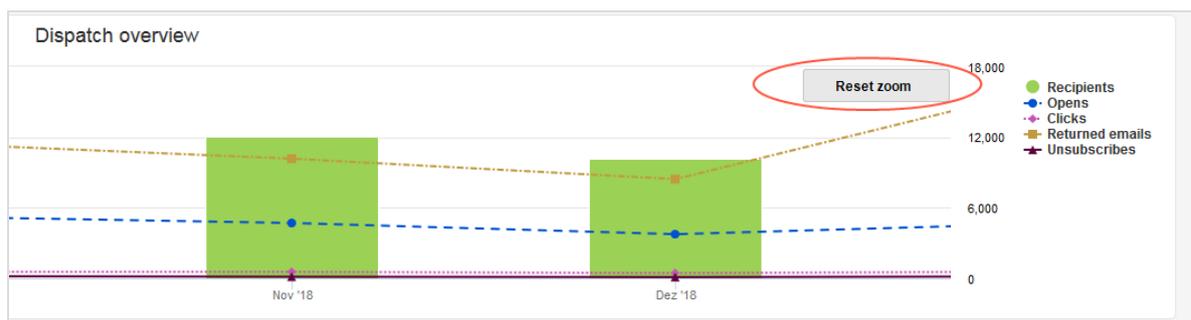
Exporting widgets

You can export widgets as an image file, PDF or CSV file. Do the following:

1. Click the hamburger menu in the upper right corner of the widget you want to export.
2. Select one of the following file formats from the drop-down list: PNG, JPEG, SVG, CSV or PDF.

> **Tip:** Downloaded image files have the double image format of the displayed widget. When you export a CSV file, the data sources shown in the graph are sorted either by date (for time-based graphs) or by recipient number (for mailing-based graphs).

Edit mode

In edit mode, you can customize, move, delete or add widgets, or rebuild your Performance Dashboard from scratch.

To open edit mode, click **Edit**.
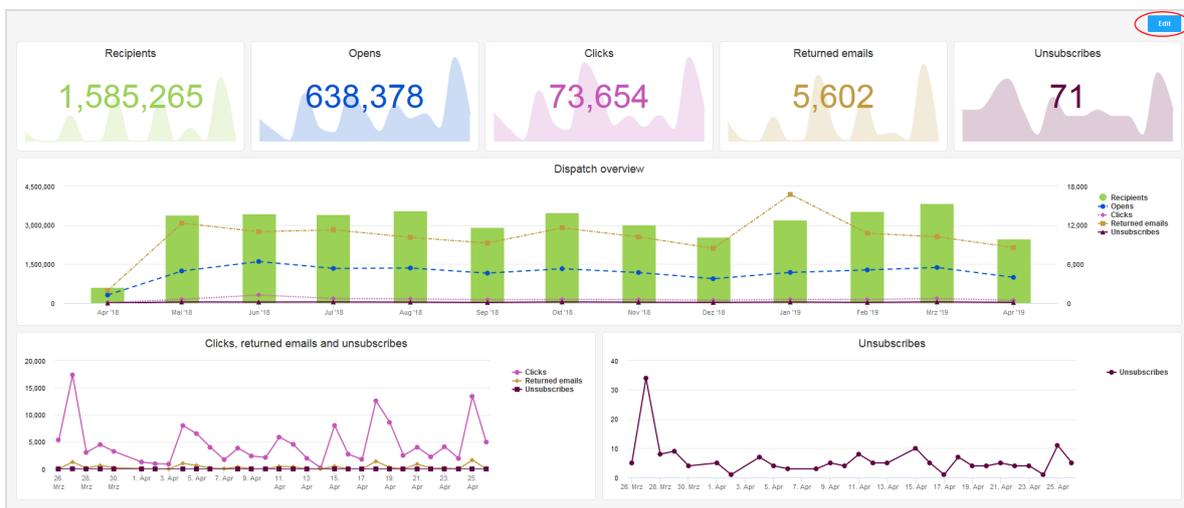
The following options are available in edit mode:

1. **Restore default**. All changes made to the Performance Dashboard are discarded and the default is restored.

2. **Add widget**. In the **Widget type** drop-down list, select *KPI chart*, *Basic chart (time-based)*, *Basic chart (mailing-based)* or *Bubble chart*. Make the desired settings for the new widget and click **Apply**. The new widget will insert either below or between the existing widgets, depending on its size and on the space available on the Performance Dashboard.

3. **Cancel**. Your changes will be discarded. You return to the Performance Dashboard overview.

4. **Apply.** Your changes are applied. You return to the Performance Dashboard overview.

5. **Edit**, **Copy**, **Delete** . Hover over a widget. The following options are displayed:

   - **Edit** . The **Edit widget** window opens. See **Editing Widgets**.

   - **Copy** . The **Copy widget** window opens. Customize the copy (See **Editing Widgets**) and click **Apply**. The copied widget will insert either below or between the existing widgets, depending on its size and on the space available on the Performance Dashboard.

   - **Delete** . The selected widget is deleted.
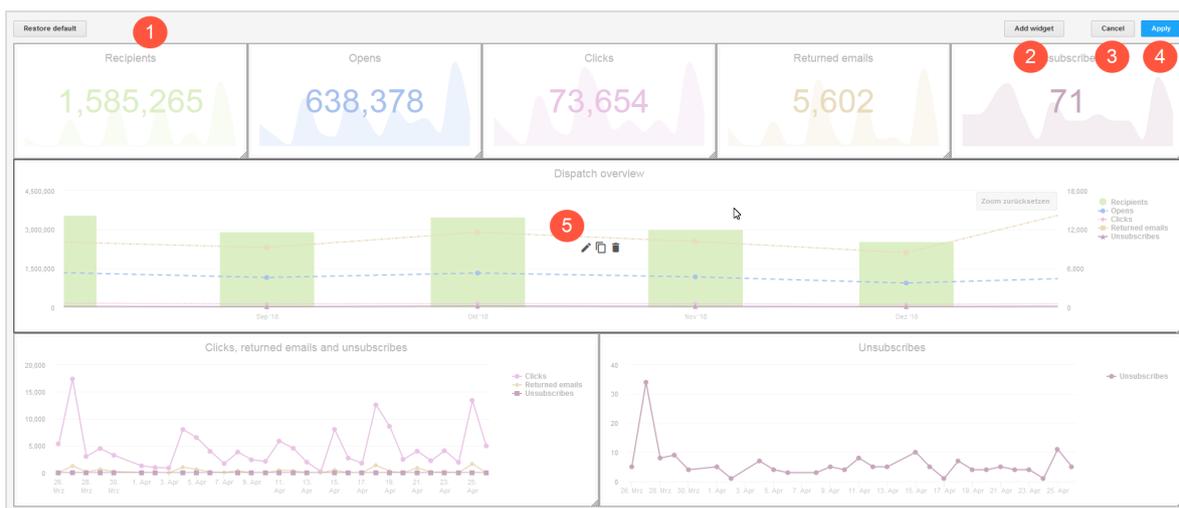
Customizing widgets

In edit mode, you can customize widgets and change their position and size:

   - **Change position**. Hold the left mouse button and drag a widget to a free space.
   - **Change size**. Drag the right side or bottom side of a widget to change the height or width of the widget. The lower right corner allows you to adjust the height and width of a widget at the same time.

Editing widgets

You can edit either a new, an existing or a copy of a widget.

In edit mode, double-click a widget or hover over a widget and click **Edit** ✏️ . A window opens with the settings of the respective widget type: **KPI chart**, **Basic chart (time-based)** , **Basic chart (mailing-based)** or **Bubble chart**.

  ### KPI chart settings

In edit mode, double-click a widget or hover over a widget and click **Edit** ✏️ .
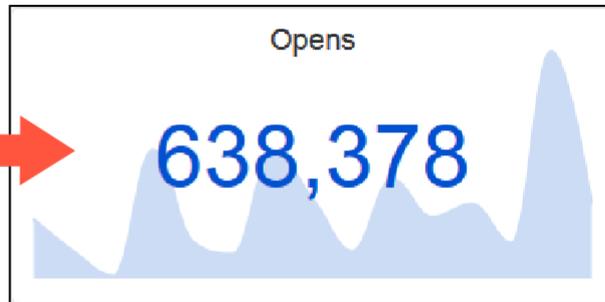
You can make the following settings:

- **Title**. Title of the KPI chart. It is displayed centered in a predefined font size. Leave the field blank if you do not want to display a title.
- **Value type**. Define the output type of your data source.

  - **Sum**. Sums up the data of the selected data source. (Example: A total of 955,000 messages were opened.)
  - **Average**. Calculates the average of the selected data. (Example: An average of 120,000 messages were opened per day.)
  - **Minimum**. Displays the lowest value of the data source of a day within the selected time period. (Example: The minimum number of open mails is 465.)
  - **Maximum**. Displays the highest value of the data source of a day within the selected time period. (Example: The maximum number of open mails is 511,000.)

- **Value style**. Define the style in which the key figure is to be displayed. Click **Edit** and in the **Edit style** window, select the property you want to edit from the drop-down list. Click **Plus** ➕ to add the property to the style set.
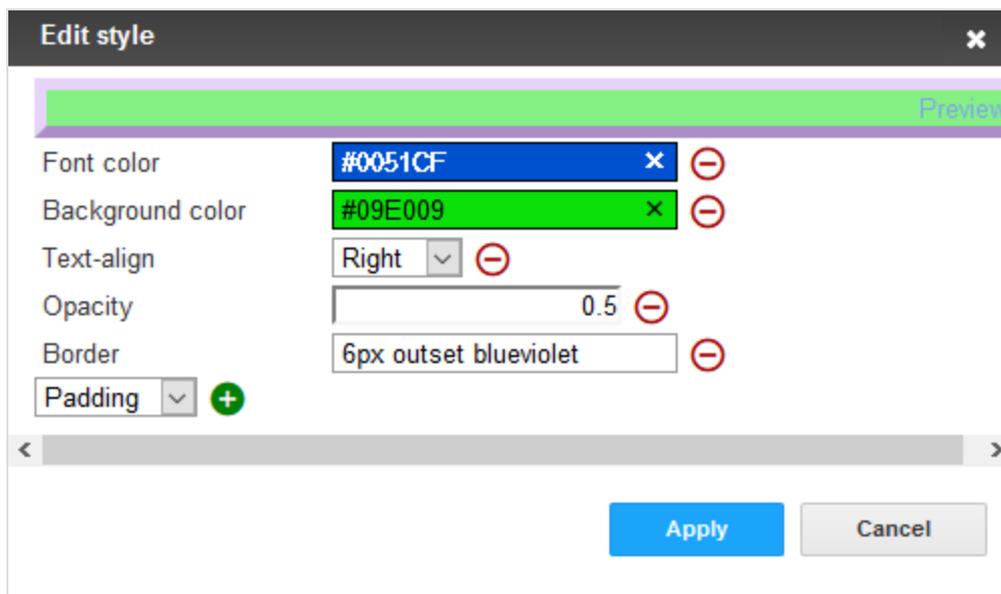
  - **Font color**. Define the font color by entering a hexadecimal value preceded by `#` (for example `#000000`). Alternatively, you can specify a color value using the color selector.
  - **Opacity**. Set a value between `0` and `1` for the opacity of the key figure.
  - **Background color**. The background is displayed in the form of a colored stripe behind the key figure. Define the font color by entering a hexadecimal value preceded by `#` (for example `#000000`). Alternatively, you can specify a color value using the color selector.

- ○ **Text-align**. Place the key figure on the left, centered or to the right of the widget. By default, the key figure is centered.
- ○ **Border**. In the text field, enter a CSS standard frame definition, such as `2px dotted orange` for a 2 pixel wide, orange dotted frame.
- ○ **Padding**. Specify a pixel value to change the vertical position of the key figure, for example, `20px` (the higher the pixel value, the lower the position of the key figure).
- ○ **Font size**. The font size is calculated automatically. Changes do not affect the output.

- **Data source**. Select the KPI you want to create a KPI chart for. The KPIs are absolute values and refer to the messages stored in your client.

  - ○ **Recipients**. Number of recipients to whom messages are sent.
  - ○ **Clicks**. Clicked Links.
  - ○ **Opens**. Opened messages.
  - ○ **Returned emails**. Messages that return to the sending mail server (including reply, autoresponder, hard and soft bounce).
  - ○ **Unsubscribes**. Registered unsubscribes.

- **Chart color**. Color of the chart displayed in the background of the KPI chart. Define the font color by entering a hexadecimal value preceded by `#` (for example `#000000`). Alternatively, you can specify a color value using the color selector.

  > **Note:** For better readability, the diagram color is slightly transparent. This results in color changes (for example red becomes pink).

- **Chart type**.

  - ○ **Area-spline**. Line chart with rounded corners and colored area.
  - ○ **Area**. Line chart with colored area.
  - ○ **Line**. Line chart.
  - ○ **Spline**. Line chart with rounded corners.

- **Time period options**.

  - ○ **Add time period**. Add a custom time period.

    - ▪ **Title**. Enter a name for the newly created period.
    - ▪ **Type**. Select whether you want the time period to be absolute or dynamic.
    - ▪ **From/To (Absolute)**. Specify a start date and an end date.

- **From/To (Dynamic)**. Starting from the current date, specify a time period in days. Use minus values to go back in the past.

  ○ Click **Minus** ⊖ to remove periods from the selection.
  ○ **Preselected time period**. Specify which period is to be displayed by default.
  ○ **Display time period selection**. Show or hide the drop-down list for time period selection in the Performance Dashboard overview.

Basic chart settings (time-based)

In edit mode, double-click a widget or hover over a widget and click **Edit** ✏️.
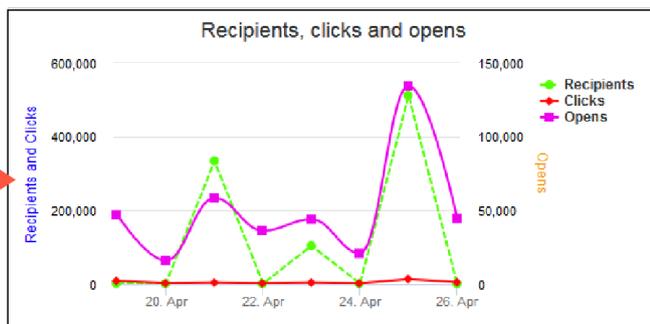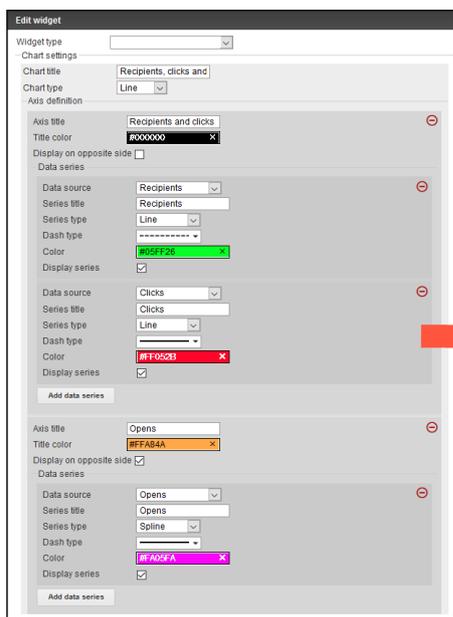
You can make the following settings:

- **Chart title**. Title of the chart. It is displayed centered in a predefined font size. Leave the field blank if you do not want to display a title.
- **Chart type**.

  ○ **Bar**. Display as bar chart.
  ○ **Line**. Display as line chart.

- ○ **Column**. Display as column chart.

- **Axis title**. Title of the Y-axis of the diagram. Leave the field blank if you do not want to display a title.
- **Title color**. Select a color for the axis title. Define the font color by entering a hexadecimal value preceded by `#` (for example `#000000`). Alternatively, you can specify a color value using the color selector.
- **Display on opposite side**. By default, the axis title is on the left side. Enable this option to display the axis title on the right side.
- **Data source**. Select the KPI you want to create a KPI chart for. The KPIs are absolute values and refer to the messages stored in your client.

  - ○ **Recipients**. Number of recipients to whom messages are sent.
  - ○ **Clicks**. Clicked links.
  - ○ **Opens**. Opened messages.
  - ○ **Returned emails**. Messages that return to the sending mail server (including reply, autoresponder, hard and soft bounce).
  - ○ **Unsubscribes**. Registered unsubscribes.

- **Series title**. Enter a significant name for the created chart.
- **Series type**. Select the display format of the chart.

  - ○ **Area**. Line chart with colored area.
  - ○ **Area-Spline**. Line chart with rounded corners and colored area.
  - ○ **Column**. Column chart.
  - ○ **Line**. Line chart.
  - ○ **Spline**. Line chart with rounded corners.
  - ○ **Scatter**. Values are displayed as separate points.

- **Dash type**. Select the desired dash type from the drop-down list.
- **Color**. Select a color for the displayed chart. Define the font color by entering a hexadecimal value preceded by `#` (for example `#000000`). Alternatively, you can specify a color value using the color selector.
- **Display series**. Disable this option to hide the graph. You can reactivate a hidden data series in the Performance Dashboard overview at any time.
- **Add data series**. Click **Add data series** to add another graph.
- **Add axis definition**. Click **Add axis definition** to add another Y-axis to the graph. The scale of the new Y-axis depends on the data series you create under this axis definition.

- Time period options.

  - **Add time period**. Add a custom time period.

    - **Title**. Enter a name for the newly created period.
    - **Type**. Select whether you want the time period to be absolute or dynamic.
    - **From/To (Absolute)**. Specify a start date and an end date.
    - **From/To (Dynamic)**. Starting from the current date, specify a time period in days. Use minus values to go back in the past.

  - Click **Minus** ⊖ to remove periods from the selection.
  - **Preselected time period**. Specify which period is to be displayed by default.
  - **Display time period selection**. Show or hide the drop-down list for time period selection in the Performance Dashboard overview.

Basic chart settings (mailing-based)

In edit mode, double-click a widget or hover over a widget and click **Edit** ✏️.
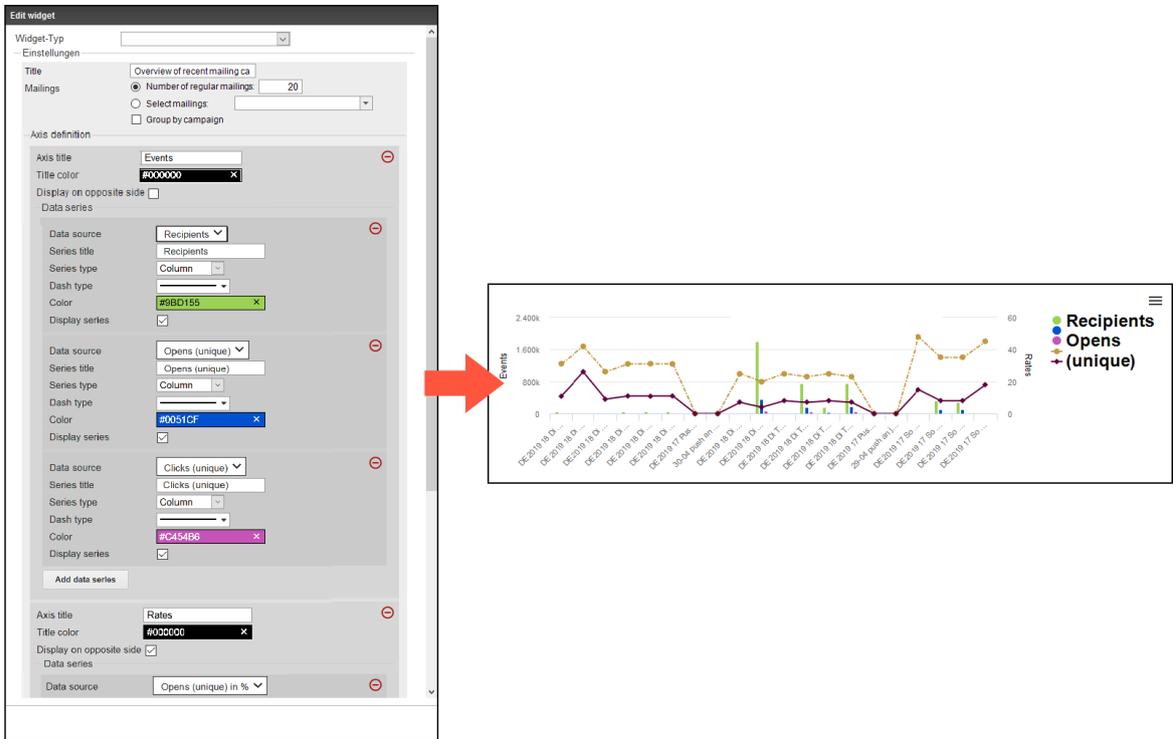
You can make the following settings:

- **Title**. The title of the bubble chart. It is displayed centered in a predefined font size. Leave the field blank if you do not want to display a title.
- **Mailings**.

  - **Number of regular mailings**. Enter the number of most recently created regular mailings that you want to display. Transactional mails, test mails, and confirmation mails are excluded.
  - **Select mailings**. Select one or more mailings. You can select transactional mails as well as regular mailings.
  - **Group by campaign**. Select the check box to group the selected mailings according to the assigned campaign.

- **Axis definition**.

  - **Axis title**. Title of the Y-axis of the diagram. Leave the field blank if you do not want to display a title.
  - **Title color**. Select a color for the axis title. Define the font color by entering a hexadecimal value preceded by # (for example #000000). Alternatively, you can specify a color value using the color selector.
  - **Display on opposite side**. By default, the axis title is on the left side. Enable this option to display the axis title on the right side.

- Data source. Select the KPI you want to create a KPI chart for. The KPIs are absolute values and refer to the messages stored in your client.

  - Recipients. Number of recipients to whom messages are sent.
  - Opens. Opened messages.

    - (absolute). Total number of opens.
    - (unique). Total number of unique opens. Multiple opens by a recipient are seen as a unique open.
    - (absolute) in %. Percentage of total opens in relation to the number of recipients.
    - (unique) in %.Percentage of unique opens in relation to the number of recipients.

  - Clicks. Clicked links.

    - (absolute). Total number of clicks.
    - (unique). Total number of unique recipients that clicked an arbitrary link in a mailing. It does not matter how often and which link was clicked.
    - (absolute) in %. Percentage of total clicks in relation to the number of recipients.
    - (unique) in %. Percentage of unique clicks in relation to the number of recipients.

  - Bounces. Messages for which bounces have been registered, including soft and hard bounces.

    - (absolute). Total number of bounces.
    - (unique). Total number of unique bounces.
    - (absolute) in %. Percentage of total bounces in relation to the number of recipients.
    - (unique) in %. Percentage of unique bounces in relation to the number of recipients.

  - Soft bounces. Messages for which soft bounces have been registered.

    - (absolute). Total number of soft bounces.
    - (unique). Total number of unique soft bounces.
    - (absolute) in %. Percentage of total soft bounces in relation to the number of recipients.
    - (unique) in %. Percentage of unique soft bounces in relation to the number of recipients.

  - Hard bounces. Messages for which hard bounces have been registered.

    - (absolute). Total number of hard bounces.
    - (unique). Total number of unique hard bounces.

- **(absolute) in %**. Percentage of total hard bounces in relation to the number of recipients.
- **(unique) in %**. Percentage of unique hard bounces in relation to the number of recipients.

- **Returned emails**. Messages that return to the sending mail server (including reply, autoresponder, hard and soft bounce).

  - **(absolute)**. Total number of returned emails.
  - **(unique)**. Total number of unique returned emails.
  - **(absolute) in %**. Percentage of total returned emails in relation to the number of recipients.
  - **(unique) in %**. Percentage of unique returned emails in relation to the number of recipients.

- **Unsubscribes**. Registered unsubscribes.

  - **(absolute)**. Total number of unsubscribes.
  - **(unique)**. Total number of unique clicks on an unsubscribe link.
  - **(absolute) in %**. Percentage of total unsubscribes in relation to the number of recipients.
  - **(unique) in %**. Percentage of unique clicks on an unsubscribe link in relation to the number of recipients.

- **Series title**. Enter a significant name for the created chart.
- **Series type**. Select the display format of the chart.

  - **Area**. Line chart with colored area.
  - **Area-Spline**. Line chart with rounded corners and colored area.
  - **Column**. Column chart.
  - **Line**. Line chart.
  - **Spline**. Line chart with rounded corners.
  - **Scatter**. Values are displayed as separate points.

- **Dash type**. Select the desired dash type from the drop-down list.
- **Color**. Select a color for the displayed chart. Define the font color by entering a hexadecimal value preceded by # (for example #000000). Alternatively, you can specify a color value using the color selector.
- **Display series**. Disable this option to hide the graph. You can reactivate a hidden data series in the Performance Dashboard overview at any time.
- **Add data series**. Click **Add data series** to add another graph.
- **Add axis definition**. Click **Add axis definition** to add another Y-axis to the graph. The scale of the new Y-axis depends on the data series you create under this axis definition.

Bubble chart settings

In edit mode, double-click a widget or hover over a widget and click **Edit** ✏.
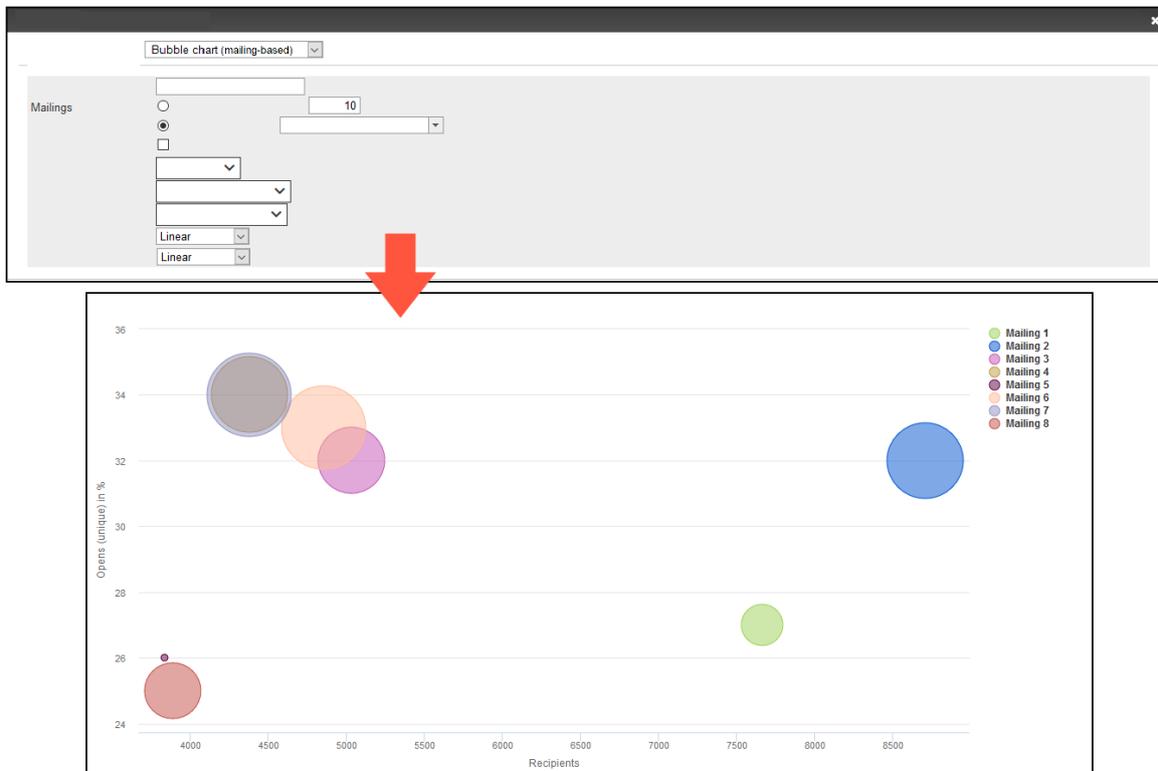
You can make the following settings:

- **Title**. The title of the bubble chart. It is displayed centered in a predefined font size. Leave the field blank if you do not want to display a title.
- **Mailings**.

    - **Number of regular mailings**. Enter the number of most recently created regular mailings that you want to display. Transactional mails, test mails, and confirmation mails are excluded.
    - **Select mailings**. Select one or more mailings. You can select transactional mails as well as regular mailings.
    - **Group by campaign**. Select the check box to group the selected mailings according to the assigned campaign.

- X, Y, Z axis values.

  - Recipients. Number of recipients to whom messages are sent.
  - Opens. Opened messages.

    - (absolute). Total number of opens.
    - (unique). Total number of unique opens. Multiple opens by a recipient are seen as a unique open.
    - (absolute) in %. Percentage of total opens in relation to the number of recipients.
    - (unique) in %. Percentage of unique opens in relation to the number of recipients.

  - Clicks. Clicked links.

    - (absolute). Total number of clicks.
    - (unique). Total number of unique recipients that clicked an arbitrary link in a mailing. It does not matter how often and which link was clicked.
    - (absolute) in %. Percentage of total clicks in relation to the number of recipients.
    - (unique) in %. Percentage of unique clicks in relation to the number of recipients.

  - Bounces. Messages for which bounces have been registered, including soft and hard bounces.

    - (absolute). Total number of bounces.
    - (unique). Total number of unique bounces.
    - (absolute) in %. Percentage of total bounces in relation to the number of recipients.
    - (unique) in %. Percentage of unique bounces in relation to the number of recipients.

  - Soft bounces. Messages for which soft bounces have been registered.

    - (absolute). Total number of soft bounces.
    - (unique). Total number of unique soft bounces.
    - (absolute) in %. Percentage of total soft bounces in relation to the number of recipients.
    - (unique) in %. Percentage of unique soft bounces in relation to the number of recipients.

  - Hard bounces. Messages for which hard bounces have been registered.

    - (absolute). Total number of hard bounces.
    - (unique). Total number of unique hard bounces.
    - (absolute) in %. Percentage of total hard bounces in relation to the number of recipients.
    - (unique) in %. Percentage of unique hard bounces in relation to the number of recipients.

- Returned emails. Messages that return to the sending mail server (including reply, autoresponder, hard and soft bounce).

  - (absolute). Total number of returned emails.
  - (unique). Total number of unique returned emails.
  - (absolute) in %. Percentage of total returned emails in relation to the number of recipients.
  - (unique) in %. Percentage of unique returned emails in relation to the number of recipients.

- Unsubscribes. Registered unsubscribes.

  - (absolute). Total number of unsubscribes.
  - (unique). Total number of unique clicks on an unsubscribe link.
  - (absolute) in %. Percentage of total unsubscribes in relation to the number of recipients.
  - (unique) in %. Percentage of unique clicks on an unsubscribe link in relation to the number of recipients.

- Display of the x and y axis.

  - Linear. The axis values are displayed linearly - in successive steps.
  - Logarithmic. The axis values are displayed exponentially.

Deep Analytics

Deep Analytics is a report suite that you can configure to measure the success of your campaigns and evaluate mailings in detail. Select measures and group them by time period, recipient segment, click profile, and other factors.

To start Deep Analytics, open the start menu > Analytics > Deep Analytics. The Introduction page appears initially, containing information about the functionality of Deep Analytics.

Manage reports and report templates in the Overview tab. It shows report templates on the upper section, and executed reports in the lower section.

> Tip: Up-to-date data
>
> When you execute a Deep Analytics report, it aggregates up-to-date data. The report's measures may vary slightly from those in the mailing overview, because the data is not aggregated at each request, but in fixed chronological intervals.

Benefits of Deep Analytics

- Detailed reports based on raw data
- Seamless integration with Microsoft Excel and CSV-based (comma-separated values) pivot tables and visualizations
- Set automatic execution of Deep Analytics. Enter a time interval, upload a Microsoft Excel template, and receive the finished report in your layout (such as a pivot table) recurrently by email
- Automated emailing of reports
- Consolidate multi-faceted data from your newsletters and campaigns
- Evaluate your measures to focus on boosting sales
- "Click together" and prioritize more than 30 parameters in over 500 combinations of measures and groupings
- Create complex nested structures with target groups, click profiles or specific fields of data in your email distribution list. Data can also be depicted according to time: year, month, day, or calendar week.
- Execute reports at intervals and email them to recipients, informing managers and colleagues about email marketing measures
- Evaluate all sub-clients in a main client simultaneously, without merging data from clients
- Restrict analysis to a mailing type or recipient segment. Evaluate split mailings individually.
- Compare performance against previous analysis reports
- Monitor and control target groups across several clients to observe the development of recipient groups, and to evaluate target group-specific campaigns
- Return KPIs (key performance indicators) such as *return on investment* or *sales per recipient*

> ### Tip: Pivot tables in Excel
>
> Excel-based pivot tables support easy data preparation and visualization – enabling fast monitoring of performance figures. Large amounts of data can be reduced to a manageable level to aid the analysis. Contact customer support if you need help creating pivot tables or their visualization.

Creating a report template

To create a new report template, in the **Overview** tab, click **New**. The wizard guides you through the process of creating a report template in four steps:

- Step 1. Introduction. Helpful information
- Step 2. Report data. Select report data, measures and groupings

- **Step 3. Report template**. Upload report template and configure automatic execution
- **Step 4. Sending options**. Configure automatic dispatch of the report

> **Note:** To delete a report template, click a report template in the **Report templates** list then click **Delete**. Deleting or changing a template does not affect already executed reports. Reports that are executed from deleted templates are shown as **Not assigned to a template** in the list.

Step 1. Introduction

The **Introduction** tab contains information about creating report templates. If you are already familiar with Deep Analytics, select **Do not show this tab again** in the lower left corner. Click **Report data**.

Step 2. Report data settings

The **Report data** tab lets you define which data is evaluated in a report. You can specify recipients, mailings, measures, and groupings.
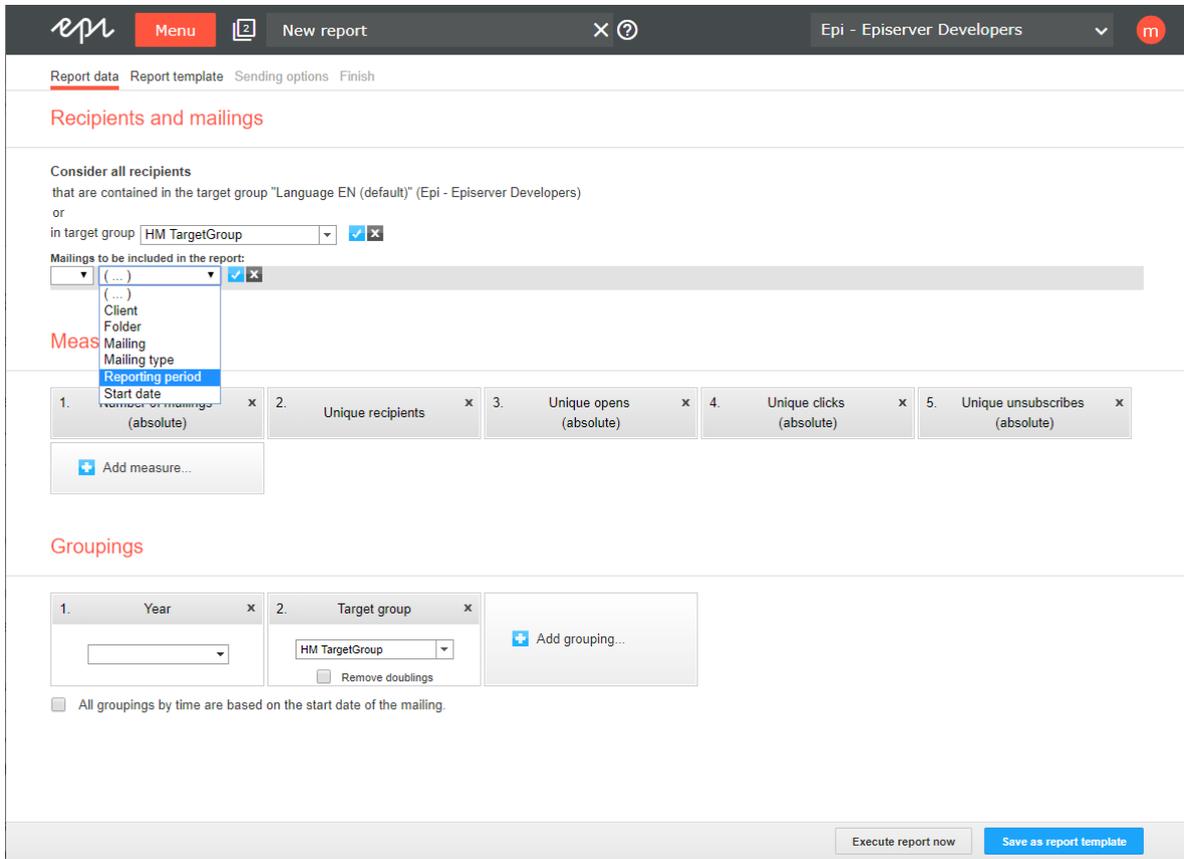
Recipients and mailings

In the **Recipients and Mailings** area, define recipient segments, mailings, and clients that you want to analyze. If you do not perform the following steps, relevant data is used for the report.

1. To analyze recipients by target group, click **Add** ➕ below **Consider all recipients**.
2. In the list, select a target group and click **OK** ✅.
3. Repeat these steps to use multiple target groups for this report.

   > **Note:** Selected target groups are applied to selected clients when the report is executed. This may lead to unwanted results if a target group uses filter rules that do not match recipients in selected clients. See the following mailing example to learn more.

4. To analyze certain mailings, click **Add** ➕ below **Mailings to be included in the report**.
5. To create an exclusive condition (such as *is not*, *contains not*, *has not*), in the left drop-down list, select **not**.

6. In the next drop-down list, you can select the following options.

- **(…)**. Create nested conditions by clicking the parentheses.
- **Client**. Only available if you have access to more than one client. By default, the client to which you are logged in is selected.
- **Folder**. Only mailings from specific folders.
- **Mailing**. Only specific mailings.
- **Mailing type**. Select one or more mailing types:

    - **Regular**. Optimized mailings of an **A/B test** (Smart Campaigns) and mailings from Mailings Classics (deprecated).
    - **Special**. Transactional mails.
    - **Confirmation email**. Confirmations.
    - **Split**. Split mailings from Mailings Classics (deprecated) .
    - **Campaign**. Mailings and **split** mailings of a Smart Campaign (without optimized mailings).

        > **Tip:** To select all mailings of an A/B test in a Smart Campaign, select both options **Regular** (to select the optimized mailing) and **Campaign** (to select the split mailings).

- **Start date**. Select the start date in the next step.
- **Reporting period**. A reporting period lets you specify the time frame from which data is collected and used for the analysis. By default, only mailings started in the given period are analyzed. If you remove this filter, also opens, clicks, unsubscribes, returned email and post-clicks that are created from mailings started prior to the reporting period but were only opened, clicked, unsubscribed, and so on within the given period, are analyzed. For the **mailings** and **recipients** measures, this difference is irrelevant.

7. In the next drop-down list, click the value for the selected filter option.
8. To combine several conditions, click **Add** 🞤 to add a new condition. Between two conditions, an **AND** or **OR** logic relation appears, which you can change by clicking it.

    > **Note:** Due to correctness and logical disambiguation, target groups without parentheses can contain only one type of logic relation. Thus, if you click a relation, relations between the rules are changed. If you want to use different types of logic relations, use parentheses.
    >
    > Parentheses group rules hierarchically to handle them with priority, like in a mathematical equation. Rules within the parentheses are applied first, followed by rules in the second level, and so on. Parentheses are especially useful if a complex condition is planned and different logic terms (**AND** or **OR**) will be used.

9. Click **OK** ✅.

Measures

A measure is defined as a numerical measure of a user interaction or characteristic of your mailing. Measures have the following characteristics:

- Measures are expressed in form of a number.
- Measures are stand-alone entities. If you look at a metric in a stand-alone fashion, it provides information about the overall performance of your mailing.
- Measures form the columns of a report structure.
- You can combine measures in a report.

> **Tip:** For a description of available measures, see **Measures**.

In the **Measures** area, define measures to be evaluated for this report:

1. Click **Add measure…** ➕.
2. Select a measure from the menu.

```
⊟ Mailings
    Total volume
⊟ Recipients
    Recipients (absolute)
    Recipients minus bounces (absolute)
    Recipients minus bounces (%)
⊟ Opens
    Opens (absolute)
    Unique open rate (%)
    Open rate (%)
    Unique gross open rate (%)
    Gross open rate (%)
⊟ Clicks
    Clicks (absolute)
    Click rate (%)
    Unique click rate (%)
    Unique gross click rate (%)
    Gross click rate (%)
    Effective unique click rate (%)
⊟ Responses
    Unique responses (absolute)
    Unique response rate (%)
    Unique autoresponder (absolute)
    Unique autoresponder rate (%)
    Unique replies (absolute)
    Unique reply rate (%)
    Unique bounces (absolute)
    Unique bounce rate (%)
    Unique hard bounces (absolute)
    Unique hard bounce rate (%)
    Unique soft bounces (absolute)
    Unique soft bounce rate (%)
⊟ Unsubscribes
    Unique unsubscribe rate (%)
    Unique net unsubscribe rate (%)
```

3. Repeat these steps for measures you want to analyze.

> **Tip:** You can drag and drop a measure to the desired position if you want to change it.

Groupings

Groupings (dimensions) have the following characteristics:

- Groupings are non-numerical data fields.
- Unlike measures, groupings are not stand-alone entities, i.e., they are not generally meaningful when viewed individually.
- Groupings, when coupled with measures, provide meaningful context to the data.
- Groupings are used to segment a measure.

> **Tip:** For a description of grouping, see [Groupings](#).

In the **Grouping** area, select groupings with which the measures will be matched:

1. Click **Add grouping…** ➕.
2. Select a grouping from the menu.
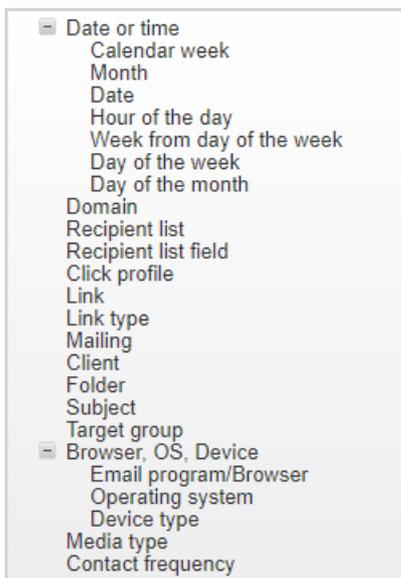
3. In the list, select a value (for example, *HM TargetGroup*) if you want to specify the grouping more exactly.

4. Repeat these steps for groupings the report will evaluate.

Time-based reports

To arrange recipient-specific actions (such as, opens) for a mailing according to the start date of the mailing (mailing-time-based analysis), select the **All groupings by time are based on the start date of the mailing** check box. If you clear the check box, recipient-specific actions are arranged separately according to when they occurred (time-action-based analysis).

- Mailing "New Year Newsletter" was started on 01/01/2018.
- Mailing "Information Newsletter" was started on 06/02/2018.
- Time-action-based analysis (check box cleared):

Calendar week	Mailing	Opens (absolute)
01/2018	New Year Newsletter	5
03/2018	New Year Newsletter	5
04/2018	New Year Newsletter	10
06/2018	Information Newsletter	5
08/2018	Information Newsletter	5
09/2018	Information Newsletter	5

- Mailing-time-based analysis (check box selected):

Calendar week	Mailing	Opens (absolute)
01/2018	New Year Newsletter	20
06/2018	Information Newsletter	15

Removing doublings

You can remove double counts from the **Click profile**, **Link**, and **Target group** groupings automatically. For example, a recipient in the target groups *Men* and *Age 30-40 years* is counted twice if you use both target groups in a report. Thus, the sum line contains doublings. To prevent this, select the **Remove doubling** check box in the grouping, so the report shows only one match for an arbitrary (applicable) target group of a recipient.

- The recipient belongs to the target groups "Men" **and** "Age 30-40 years".
- If you clear the **Remove doubling** check box, the following is shown in the report:

	Target Group	Recipients (absolute)
	Men	1
	Age 30-40 years	1
Sum line		2

- If you select the **Remove doubling** check box, the following is shown in the report:

	Target Group	Recipients (absolute)
	Men	1
	Age 30-40 years	0
Sum line		1

Combinations

You can combine multiple groupings to get multidimensional reports. For example, select the groupings **Mailing** and **Target group** to get a report that shows measures per mailing and for each target group.

User-defined arrangement

The arrangement of groupings affects the result of the report. You can drag and drop selected groupings to the desired position. If you commute the groupings **Mailing** and **Target group**, you get an evaluation of target groups and each target group is evaluated according to mailings.

> **Tip: Calculation of rates**
>
> To calculate rates (as percentages), such as open or click rates, make sure to select a grouping that delivers meaningful report data. For example, to get the open rate (as percentage) of a mailing, the **Mailing** grouping must be selected. In the same way, the open rate by target group can be displayed. However, open rates in a time-based report do not deliver meaningful values.

Step 3. Report template settings

To configure the automatic execution and sending of your template, perform the following steps after adding measures and groupings:

1. In the **New report** window, in the **Report data** tab, click **Save as report template**.
2. In the **Name** box, enter the name of the report template.

3. In the **Folder** list, select a folder to which you want to save the report template. To use an Excel template, click **Browse…** and select a template. If no template is uploaded, the Episerver default template is used.

4. In the **Interval** area, click the interval for the generation of reports from this template. If you change the interval, make sure that the last execution has run at least one hour ago.

- **Manually**. Reports can only be executed manually.
- **Weekly**. Select the day of the week and the time of day when the report should be executed.
- **Monthly**. Select the day of the month and the time of day when the report should be executed.

5. In the **Reporting Period** area, click …

- **Since last execution** to define that the report contains only data added since the last execution of the report. The selected interval is already taken into account for the first execution. If you select the Weekly interval, a reporting period of one week is used for the first execution. If you change the weekly execution interval, such as *from Monday to Wednesday*, the next execution uses the reporting period beginning Wednesday of the previous week.
- **No restrictions** to define that available data is evaluated each time the report is being executed. By using this option, the amount of data to be evaluated can be very large. The execution of such reports may take some time.

6. Click **Sending options**.

> **Tip: Reporting period**
>
> Reporting period lets you specify the time frame from which data used in the analysis is derived. The **No restrictions** option relates only to the previously-defined global report parameters and measured data. If you evaluate openings in a report and define that only mailings started in 2018 should be considered, openings for mailings of the year 2018 are counted. The **Incremental** option evaluates data added since the last execution of the report.

Step 4. Sending options

> **Tip:** If you do not want to send the reports via email, leave these fields empty.

To send the report via email, perform the following steps:

1. In the **Recipients** box, enter the email addresses of the recipients. Separate multiple email addresses with a comma.
2. In the **Subject** box, enter the subject of the email.
3. In the **Message text** box, enter the message text of the email. Executed reports are attached as Excel files to the emails.
4. Click **Save**.
5. Close the window. The new report template appears in the upper section of the **Deep Analytics - Overview** window.

Executing ad hoc report

After performing the step 2 and step 3 to create a report template, you can execute the report without configuring or saving it as a template:

1. Click **Execute report now**.

2. To use an Excel template, click **Browse…** and select a template. If you do not upload an Excel file, the default template is used.

3. In the Reporting period area, select

   - **Specify period** and specify the reporting period, a start date and an end date for the period you want to analyze.

   - **No restrictions** to define that all available data is analyzed at execution of the report. Note that by using this option the amount of data to be analyzed can be very large in the course of time. The execution of such reports may take some time.

4. Click **Sending options** and follow the steps under [Sending options](#).

5. Click **Start execution**. After execution, the report is shown in the overview window and can also be downloaded as an Excel or CSV (comma-separated values) file.

Measures

The following measure groups contain measures that are displayed when you click a group.

Mailing measures

Parameter	Description
Number of mailings (abso-lute)	Total number of outgoing mailings
Total volume	Number of recipients + Number of responses (total, non-unique) less skipped recipients

Recipient measures

Parameter	Description
Unique recipients	Number of unique recipients. If a recipient receives multiple mailings, the recipient is only counted once.
Recipients (absolute)	Total number of recipients
Recipients minus bounces (absolute)	Total number of recipients whose email addresses did not produce a bounce (message of non-deliverability)
Recipients minus bounces (%)	Percentage of recipients whose email addresses did not produced a bounce (message of non-deliverability)

Open measures

Parameter	Description
Unique opens (absolute)	Total number of unique opens. Multiple opens by a recipient are seen as one single open.
Opens (absolute)	Total number of opens
Unique open rate (%)	Percentage of unique opens in relation to the number of recipients minus bounces
Open rate (%)	Percentage of total opens in relation to the number of recipients minus bounces
Unique gross open rate (%)	Percentage of unique opens in relation to the total number of recipients
Gross open rate (%)	Percentage of total opens in relation to the total number of recipients

Click measures

Parameter	Description
Unique clicks	Number of unique recipients that clicked an arbitrary link in a mailing. It does not matter how often and which link was clicked.
Clicks (absolute)	Total number of clicks
Click rate (%)	Percentage of total clicks in relation to the number of recipients minus bounces
Unique click rate (%)	Percentage of unique clicks in relation to the number of recipients without bounces
Unique gross click rate (%)	Percentage of unique clicks in relation to the total number of recipients

Parameter	Description
Gross click rate (%)	Percentage of total clicks in relation to the total number of recipients
Effective unique click rate (%)	Percentage of unique clicks in relation to the unique opens

Response measures

Parameter	Description
Unique responses (absolute)	Total number of unique responses
Unique response rate (%)	Percentage of unique responses in relation to the number of recipients minus bounces
Unique autoresponder (absolute)	Total number of unique autoresponder messages
Unique autoresponder rate (%)	Percentage of unique autoresponder messages in relation to the number of recipients minus bounces
Unique replies (absolute)	Total number of unique replies
Unique reply rate (%)	Percentage of unique replies in relation to the number of recipients minus bounces
Unique bounces (absolute)	Total number of unique bounces
Unique bounce rate (%)	Percentage of unique bounces in relation to the number of recipients
Unique hard bounces (absolute)	Total number of unique hard bounces

Parameter	Description
Unique hard bounce rate (%)	Percentage of unique hard bounces in relation to the total number of bounces
Unique soft bounces (absolute)	Total number of unique soft bounces
Unique soft bounce rate (%)	Percentage of unique soft bounces in relation to the total number of bounces

Unsubscribe measures

Parameter	Description
Unique unsubscribes (absolute)	Number of unique clicks on the unsubscribe link
Unique unsubscribe rate (%)	Percentage of unique clicks on the unsubscribe link in relation to the number of recipients minus bounces
Unique net unsubscribe rate (%)	Percentage of unique clicks on the unsubscribe link in relation to the total number of recipients

Post-click measures

These measures are available only if post-click tracking is configured for your client. If you select the **Post-click…** measure, a new window opens where you can define the measure. To do this, perform the following steps:

1. Enter a **name**.
2. Select a **service**. (If you use only one service, it is already selected.)
3. Select whether the measure you want to create is a number (**count**), a **sum** or an **average**.
   - If you select **Sum** or **Average**, select a post-click value from the drop-down list. If you do not want to filter this value further, save the definition.
   - If you select **Count**, no filters are added.

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4. To add filters, in the **Filter** area, click **Add** ➕ and select an operator. The operators depend on whether the selected post-click represents a number or a string value.

5. Enter a reference value to compare the post-click value with. This comparison is executed according to the operator selected in the previous step.

6. Click **Submit** ✅.

7. To add more filter values, click **Add** ➕ and repeat the previous steps.

8. Click **Save**. The newly created post-click measure appears in the **New report** window in the **Report data** tab.

> **Tip: Entering multiple values**
>
> If you select **is one of the following values**, you can enter multiple values in one text box; for example, if you want to copy values from a CSV file:
>
> 1. Select the operator **is one of the following values** and enter the values, for example, comma-separated.
> 2. Open the drop-down list, click **Separate multiple values** and in the box, enter the used delimiter symbol.
> 3. Click **Submit** ✅. The entered values are now handled as single values.

Groupings

The following data is available for a Deep Analytics report, which let you group your data:

Parameter	Group by
Date or time	Date or time.
Domain	Recipient domain.
Recipient list	Recipient lists.
Recipient list field	Various fields in recipient lists.
Click profile	Used click profiles.
Link	Links used in the mailing.

Parameter	Group by
Link type	Link types used in the mailing.
Mailing	Your mailings.
Client	Clients you are allowed to access.
Folder	Folders in which you store mailings.
Subject	Subject lines used in mailings. **Note:** Only the standard subject line is considered. Additional target group-controlled subject lines are ignored.
Target group	Recipients who belong to specific target groups.
Email program/Browser	Email programs and browsers used by recipients.
Operating system	Operating systems used by recipients.
Device type	Device types used by recipients.
Media type	Media type.
Contact frequency	Number of messages received by a recipient within a reporting period.

Executing a report

1. In the **Overview** tab, in the **Report templates** area, click a report template on which the new report will be based.
2. Click **Execute report now**.

3. To use an Excel template, click **Browse…** and select a template. If you select nothing here, the Episerver Campaign default template is used.

4. In the **Reporting period** area, select an option:

   - **Specify period**. Specify the reporting period for which data will be evaluated.
   - **Since last execution**. Data added since the last execution of the report. The selected interval is already considered for the first execution. If the report is executed weekly, a reporting period of one week is used for the first execution. If you change the weekly execution interval, such as *from Monday* to *Wednesday*, the next execution uses the reporting period beginning Wednesday of the previous week.
   - **No restrictions**. All available data. The amount of data can be very large and its execution may take some time.

5. Click **Sending options**.

6. If you want to send the report via email:

   a. In the **Recipients** box, enter the email address of recipients (separate email addresses with a comma).
   b. In the **Subject** box, enter the email subject.
   c. In the **Message Text** box, enter the email message text.

7. Click **Start execution**. When the report is executed, you can display and download it in the list in the lower section.

Displaying and downloading a Deep Analytics report

1. In the **Report templates** area of the **Overview** tab, select a report template. The area **Executed Reports** displays reports that have been executed from the selected template.

   To display a report that is not executed from a template, click **Not assigned to a template** in the **Report Templates** area.

2. In the **Executed Reports** area:

   - To display the report as a pivot table, click **Show as pivot table**.
   - To display the report in a standard HTML table without formatting, select a report and click **Show as table**.
   - To download the report as a chart using Microsoft Excel, click **Download as Excel file**.

     > **Tip:** The Excel format provides many possible ways of reporting and displaying data. You may use your own Excel template or the Episerver default template to create analyses and display data in charts or pivot tables. To learn more, see **Data evaluation using Microsoft Excel**.

   - To download the report in a CSV (comma-separated values) file, click **Download as CSV file**. See also: **Opening a CSV file in Microsoft Excel**.

Opening a CSV file in Microsoft Excel

Episerver Campaign creates CSV (comma-separated values) files in UTF-8 without BOM. Microsoft Excel incorrectly interprets the format as ISO-88591. To correctly open CSV files in Excel, perform the following steps:

1. Open a blank Excel workbook.
2. In the **Data** tab, click **Get Data** > **From File** > **From Text/CSV**.
3. Select the file to open and click **Import**.
4. In the **File origin** area, select **65001: Unicode (UTF-8)** and **Semicolon** in the **Delimiters** area.
5. Click **Load**.

Evaluating data with Microsoft Excel

The Excel format allows rich formatting, calculations, and output in pivot tables and in a chart.

To use your own Excel template, download the default template, customize it then upload it. This Excel template contains the report data in the first worksheet grouped by the selected groupings. The second worksheet contains a copy of the data without sum fields. Use this worksheet to reference data you want to display in other tables or charts (for example, pivot tables).

In general, the following standards apply when formatting the Excel templates:

- **Supported file formats**. Episerver Campaign supports the Excel '97 format (file suffix .xls) and Excel 2007 (file suffix .xlsx). However, Episerver does not guarantee support of functions and formatting of these two formats.
- **Data export and data format**. Exported data is exported into the first table with sum fields and second worksheet table without sum fields. Do not change these worksheets; otherwise, the correct export of the data fails. The format of the header page is completely adopted, but not the content. The data formats of the first data row (row 2 in the Excel worksheet) are adopted. Thus, values can be formatted and the formatting can be changed.
- **Evaluations**. You can perform evaluations on the second and subsequent worksheets. Because an unlimited number of rows may be added when executing the report, chart data, pivot tables and formulas must be designed for a very large number of data rows. This especially applies to reports without time restriction.
- **Pivot tables**. Automatic updates must be turned on startup. You find this option under **PivotTable Options** > **Data** > **Refresh data when opening the file**.

> **Tip:** Upon request, Episerver creates Excel templates with pivot tables, charts and using the layout of your choice. Contact customer support.

Aggregating data with pivot tables

To organize and display large amounts of data created with Deep Analytics, use pivot tables in the online view and the downloadable Excel templates. Pivot tables can show what is important without losing details. In a pivot table, you can change the orientation and grouping of the data, and the hierarchical order of groups and categories. You can use one pivot table to display different kinds of scenarios.

Raw data is stored in the background. If you group data or omit categories in the table or chart display, no data is eliminated, and you can return to display data at any time.

Example

The following example demonstrates how to use pivot tables for exact analysis of desired data and details, using different criteria in the same report. By grouping, sorting and omitting data, you can capture reports at a glance. You do not lose any data, though. If you need to show more details, unfold the table and re-order groups and categories.

The following image shows an analysis of recipients, opens, and clicks by mailing.

You can re-analyze the data by clicking the plus icon **+** next to the grouping and without creating a new table – to the year, month, calendar week and day of the week.

Click **Fields & Filters** and drag and drop groupings, measures, lines and columns. Note that the grouping **Mailing** has disappeared, and the analysis is now time-based.

Finally, click **Refresh**, to create a new analysis:

Reports

Reports lets you analyze the mailings' most important statistics. Your account has one or more report templates. If you need a custom analysis, you can **create a new report and save it as a template** to use for subsequent mailings.

Executing reports

1. To access the report overview, open the start menu > **Analytics** > **Reports**.
2. In the overview in the **Manage Reports** window, click the mailing in the **Mailings** list for which you want to execute a report. If you select multiple mailings, the results are comparable within the report.
3. In the **Templates** area, click the template you want to use.
4. Click **Show**. The **Show Report** window opens.

> **Tip:** You can also select mailings (by selecting the check box in the table header),
> **Last mailing**, **Last 2 mailings**, **Last 3 mailing**s, or **Last 5 mailings**. This is useful if
> you want to save the report as a template and use it for other mailings. If you select
> the relative information just mentioned, the report displays correct data.

Creating and editing report templates

Your account includes one or more descriptive report templates, with which you can analyze the main characteristics of your mailings. You can also create your own report templates.

1. To create a new report or report template, open the start menu > **Analytics** > **Reports**. The Manage Reports window appears.
2. In the **Templates** area, click **New**.

> **Note:** To edit a report template, in the **Templates** area, click the template you want to edit then **Edit**.

> **Note:** To open an already executed report template, click the tab **User defined** on the upper left, next to **Mailing**.

3. In the **Title** box, enter a significant name for the new report.
4. To use a report as template for other mailings, check the **Template** box.

5. In the **Type of chart** list, select how the report data will be displayed:
   - **Aggregated**. Selected indicators are displayed as aggregated numbers. For example, the total number of clicks or the total open rate within a time period.
   - **Time elapsed**. Indicators are displayed per hour, day, week, and month.

6. Click **Chart**.

The **Create Chart** window opens.

Selecting measures and mailings

1. In the **Data source** area > **Category** drop-down list, select the measure you want to analyze.
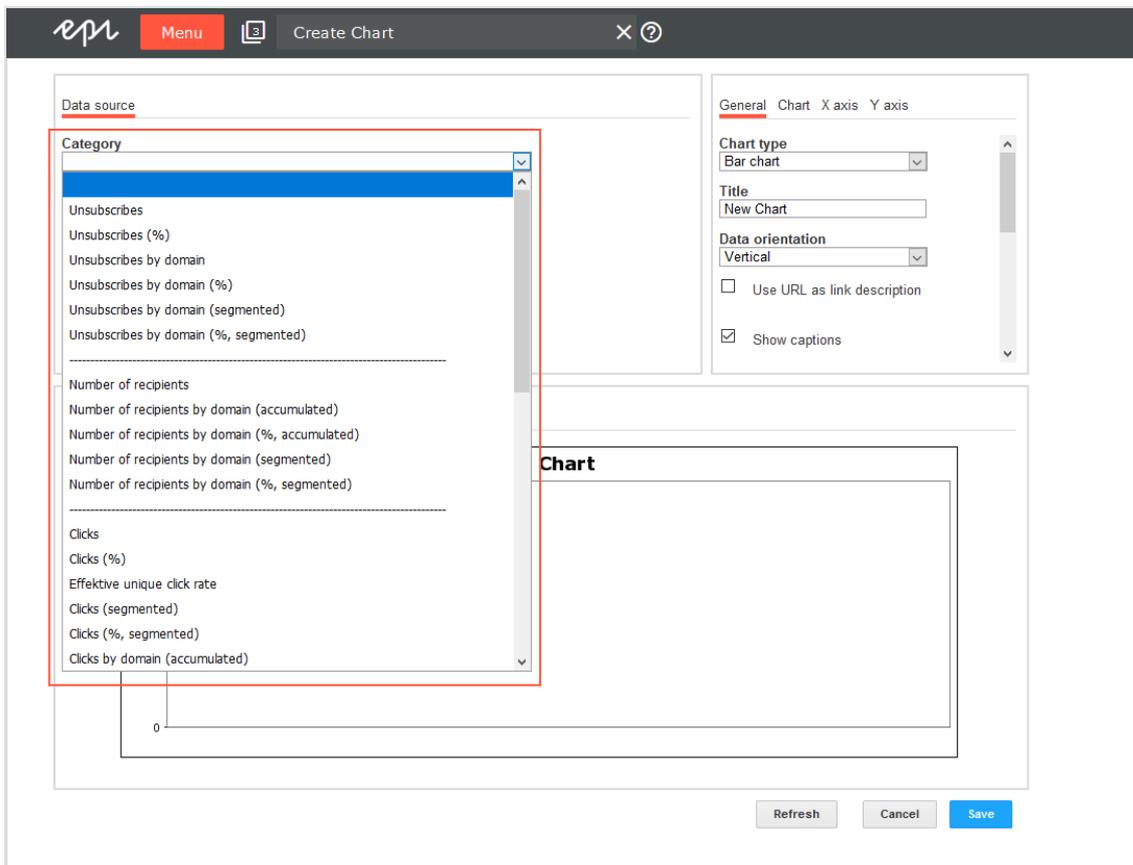
You can use the following measures for your report:

- Unsubscribes
- Number of recipients
- Clicks
- Opens
- Returned emails
- Post Click — if your client is set up accordingly

These measures can be shown in the following configurations:

Configuration	Description
Absolute	Total number of clicks, opens, and so on. The indicator is called **Clicks** or **Opens**.
As a percentage	The information is provided as a percentage.
Based on domains (cumulative)	Displays how many events (clicks, and so on) were activated by recipients whose email addresses indicate a specific domain (such as *example.com*). In this way, you can recognize how many active recipients are from various providers.
Based on domains as a percentage (cumulative)	Same as above, but as a percentage.
Based on domains (separated)	Divides the display of measured events based on the recipient email addresses.
Based on domains as a percentage (separated)	Same as above, but as a percentage.
By profile	This option is only available to display the clicks by click profile. Unique or total clicks can be displayed. A unique click in a profile means that the recipient has clicked once on any link in this profile. Several unique clicks on different links of that profile produce only one unique click in the profile.

2. For each measure that you add, a tab is displayed in the upper area of the window next to **Data source**. Click this tab to make additional settings for each measure, such as changing the bar name or color.

> **Tip:** Depending on data source, more options are available, such as limiting the links to be tracked when counting clicks.

- To remove a measure, click the **x** on the tab.
- To change the arrangement of bars in the chart, use the arrows on the tabs to move them right or left. You can change the order of the bars in the same way.

3. Click the **Mailings** list, then select check boxes next to mailings you want to analyze. If you select more than one mailing, the results are compared in the same chart. Click **OK** when finished.

4. Click **Add**. In the Preview tab, a bar with the respective data is displayed.
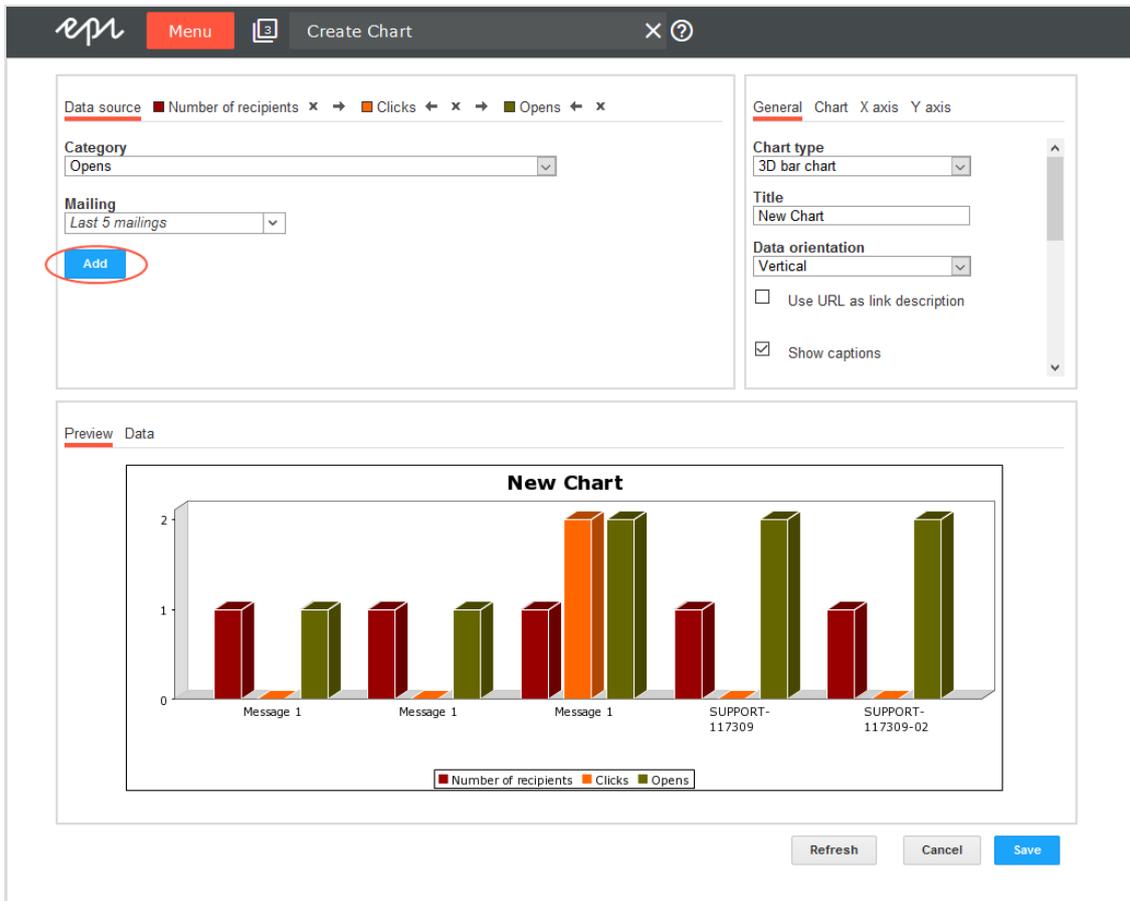
Configuring charts

In the right area of the window, you can define the chart type you want to use and labels, size, and background color. Afterwards, click **Refresh** to see how your settings affect the graph and table view then click **Save**.

You have the following options to customize your charts:

- General
- Chart
- X axis
- Y axis
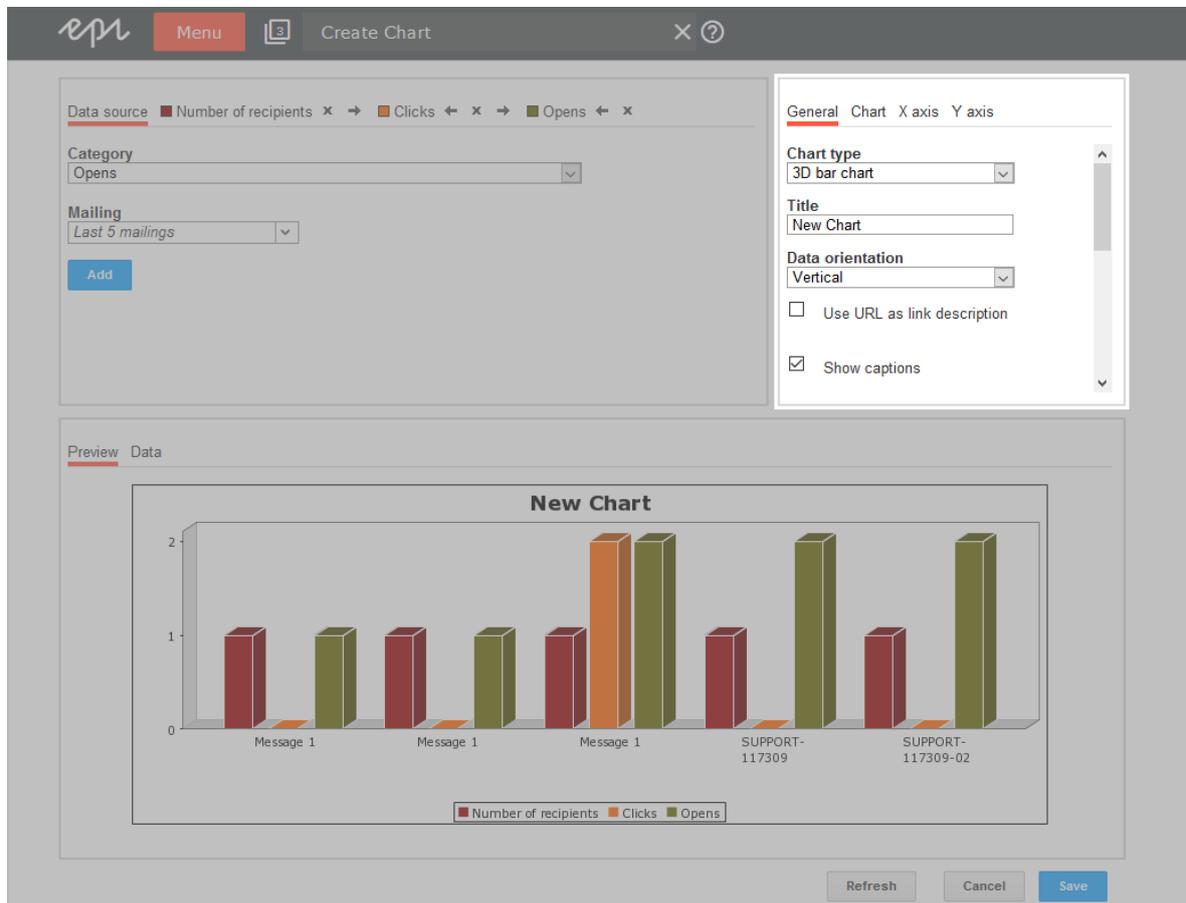
General

Option	Description
Chart type	Click the chart type you want to use: • **Bar chart**. Compare recipients, opens, clicks and unsubscribes. • **Area chart**. Display two indicators on a time-elapsed base to compare both. • **Line graph**. A time-elapsed chart type to display the progress of an indicator over a certain period. • **Pie chart**. Displays a percentage distribution of items or values.
Title	Enter the chart title.

Option	Description
Data orientation	Display the table in the **Data** tab horizontally or vertically.
Use URL as link description	Display links with their URL, to reveal what is behind each link.
Show captions	Show or hide captions.
Width, Height, Transparency, border color	Define the chart's layout further.
Show border, Border color	Select to frame the chart.

Chart

The **Chart** tab lets you customize the layout of your chart:

Option	Description
Orientation	Display the chart horizontally or vertically.
Background color	Select the background color.
Chart border color	Select the frame color.
Show bar border, border color	Select to frame each bar of the chart.
Caption orientation	Displays captions of the bars horizontally or vertically.

X axis

Option	Description
Show	Show or hide the X axis.

Option	Description
Title	Enter a title for the X axis.
Show grid lines	Show or hide the grid lines.
Grid line color, grid line style	Define the style further.

Y axis

Option	Description
Show	Show or hide the Y axis.
Title	Enter a title for the Y axis.
Show captions	Show or hide labels.
Axis marks	Show or hide axis marks.
Show grid lines	Show or hide grid lines.
Grid line color, grid line style	Define the style further.

Deleting a report template

To delete a report template, in the **Templates** area, click the report template > **Delete**.

Saving a new report

The **New Report** window displays analyses created for this report.

You can add any number of additional analyses to your report. Click on **Chart** and create a new diagram as described under Selecting measures and mailings. Then, save the report template via **Save** or **Save As** to add the diagram to the report template.

For the **Graphics and data** tab, the complete analysis is shown (including images and text); for the **Graphics** or **Data** tabs, only those display formats are shown.
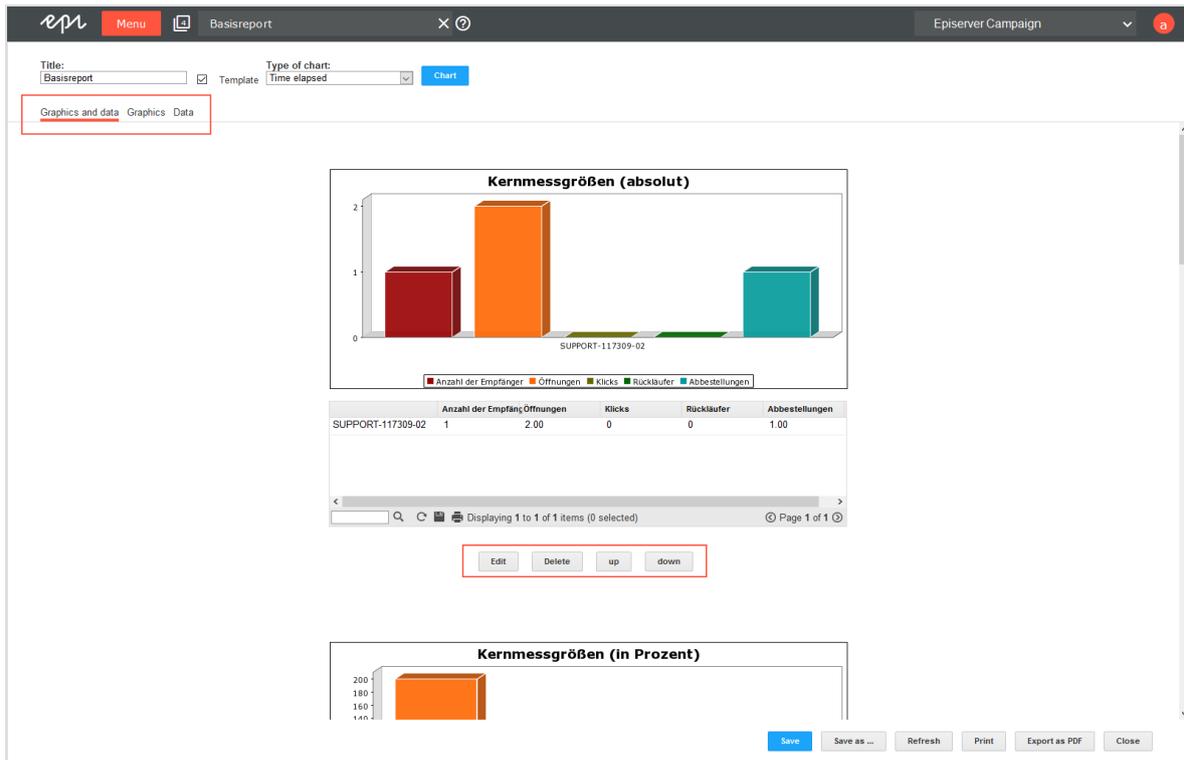
You can perform the following actions on every analysis:

- **Edit**. Change the settings.
- **Delete**. The analysis is erased from the report.
- **Up**. The analysis is moved up in the report.
- **Down**. The analysis is moved down in the report.

If one of the charts in the report is time-elapsed (option **Type of chart**), use the tabs over the chart to switch among hour, day, week, or month modes. With the **Start date** and **End date** fields, you can set the exact time period to be displayed. Click **Apply** to recalculate the chart. If **Apply to all** is clicked instead, the charts in the report are also recalculated based on the new time period.

To save the report, click **Save**.

Live Analytics

Live Analytics lets you create RFM analyses in real time from the entire recipient dataset, or a subset of recipients. Live Analytics stores recipient action data from mailing lists then analyzes that data from the previous 12 months. The data is updated daily.

Live Analytics ensures high performance for the analysis of large quantities of data. Running analyses show an up-to-date image of the customer lifecycle, preferences, sales volume, and recipients' purchases.

RFM analysis

RFM analysis is an effective procedure for the analysis, prediction, and optimization of the customer base. RFM stands for the following three parameters, indicators of the probability that a customer will react to a marketing campaign in the future:

- **Recency**. When a customer's most recent action was made, including purchases, aborted orders, or a product view.
- **Frequency**. The frequency with which a customer performed the above actions.
- **Monetary**. The sales volume a customer generated; only the purchase action is analyzed.

You can increase profitability and ROI (return on invest) of your campaigns with the combination of these three parameters. Each recipient is assigned to an RFM segment. You can view the entire recipient base as well as individual segments, further constrain them, and define them as a target group for a campaign.

Live Analytics packages

You can run up to three Live Analytics analyses simultaneously using the standard package. If you need more analyses, contact **customer support** to expand it.

To start Live Analytics, open the start menu > **Analytics** > **Live Analytics**. The **Live Analytics** window shows running analyses in the selected display (pie, line or bar chart).

You can arrange analyses in the desired order using drag and drop. To do this:

1. Move the pointer over an analysis in the blue bars on the upper edge until the pointer switches to the drag and drop symbol .

2. Drag the analysis to the desired position.

Then, perform the following actions:

- **Create**. See Create and edit Live Analytics analysis.
- **Detail**. See Live Analytics detail view.

- **Edit**. Move the pointer over the analysis and click **Edit analysis** . Then, see Create and edit Live Analytics analysis.

- **Delete**. Move the pointer over the analysis, click **Delete analysis** then **Delete**.

Creating a Live Analytics analysis

1. To create a new analysis, in the **Live Analytics**, window click **Add** ⊕. The **Create analysis** window opens.

> **Note:** To edit an already existing analysis in the Live Analytics window, move the
> pointer over the desired analysis and click **Edit analysis** . The **Edit ana-lysis** window opens.

2. Drag the desired Live Analytics analysis items from the left action area to the **Limitations** (to perform a pre-selection of the analyzed recipients) and **Charts** areas.
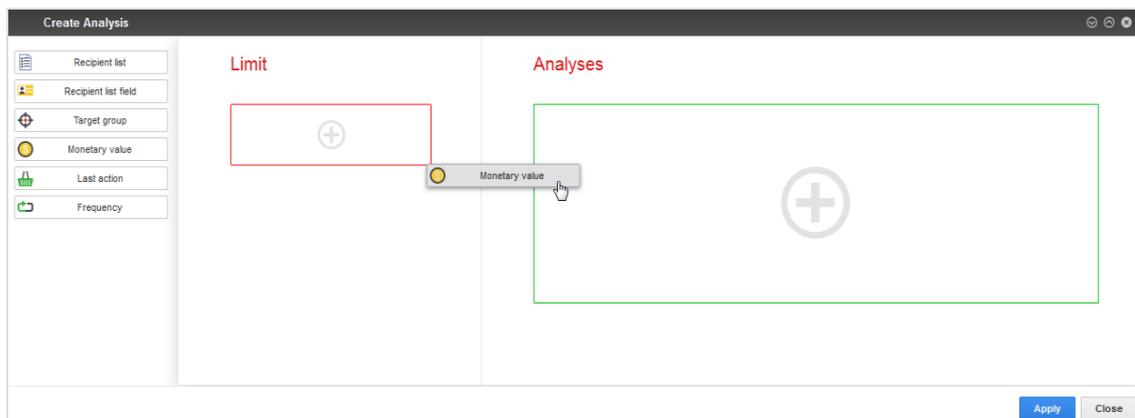
3. To edit an analysis item, move the pointer over the desired item in the **Limitations** or **Charts** area and click **Edit chart** .

4. To change the chart type of an analysis item, move the pointer over the desired item in the **Charts** area and click the desired chart symbol for pie, line, or bar charts.

   - **Pie chart**. Each piece of the pie represents one recipient segment for a period, frequency, or sales volume. Click a piece to constrain the selection to this segment.

   - **Line chart**. Each point of the line represents one recipient segment for a period, frequency or sales volume. Click a point to constrain the selection to this segment.

- **Bar chart**. Each bar represents one recipient segment for a period, frequency or sales volume. Click a bar to constrain the selection to this segment.

5. Configure the analysis items as described in Analysis items.
6. To remove an analysis item, move the pointer over the item and click **Delete chart** .

7. You can arrange the analysis items in the desired order, both under **Limitations** and **Charts**. To move an item, move the pointer over the item. The pointer switches to the **Move** symbol . Click and drag the item to the desired position.
8. Click **Apply**.
9. In the **Name** field, enter a name for the analysis and click **Apply**. The analysis is shown in the overview. If no analysis data is available, a notification appear. When the computation of the analysis data is concluded, the charts and data are displayed.

> ### Note: Limitations
>
> - An analysis must include at least one chart.
> - An analysis can include multiple charts.
> - Invalid parameters or missing configurations are displayed when you add an analysis item as a constraint or chart.

Analyzing Live Analytics items

Analysis items form dimensions that you can use as a limitation or chart in an analysis. Restrictions apply to the use of analysis items as a limitation.

The following table shows analysis items and their options. Click an analysis item to read about its use and configuration.

Analysis item	Description	Constraint	Chart
Recipient list	Constrains recipients to one or more recipient lists or analyzes recipients sorted according to recipient lists.	✓	✓
	Constrains recipients to a recipient list with a specific value or analyzes recipients sorted according to the values of a recipient list field.	✓	✓

Analysis item	Description	Constraint	Chart
Recipient list field			
⊕ **Target group**	Constrains recipients to one or more target groups or analyzes recipients sorted according to target groups. **Note:** Target groups must have been created in the Target groups function.	✓	✓
🪙 **Monetary value**	Analyzes recipients sorted according to sales figures within the past 12 months.	✗	✓
🧺 **Last action**	Analyzes recipients sorted according to the time period of their last action (purchase, product view, abandoned shopping cart) within the last 12 months.	✗	✓
↪ **Frequency**	Analyzes recipients sorted according to the frequency of an action (purchase, product view, abandoned shopping cart) within the last 12 months.	✗	✓

Limitations

A **limitation** limits the data to be analyzed with the aid of an analysis item. You can add or remove limitations in running analyses. You can also create analyses without limitations.

To use an analysis item, drag it from the left action area to the **Limitations** and **Charts** areas. You can make limitations in the analysis by using to the following analysis items:

- **Recipient lists**. Select recipient lists to include in the analysis.
- **Recipient list fields**. Select a recipient list field and a value range to include only recipients with these attributes in the analysis.
- **Target groups**. Select target groups to include in the analysis.

> **Tip:** If you make no limitations, all active recipients of your client are considered for

> the analysis. You can deactivate selected limitations later in the detail view of an analysis.

Chart

In a **chart**, the value range of an analysis item is displayed segmented, according to the selected dimension. The segmentation can be carried out according to time, frequency, sales volume, grouping or defined values.

> **Tip:** For items that use charts: you can change the chart type at any time, even in running analyses.

Recipient list

Limitation

1. Drag the analysis item from the left action area to the **Limitations** area.
2. Enter an optional name for the limitation. If you are using multiple analysis items of the same type, names help you differentiate them.
3. In the list, select the desired recipient lists.
4. Click **Close**.

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter an optional name for the chart. If you are using multiple analysis items of the same type, names help you differentiate them.
3. In the list, select the recipient lists. If you enter multiple recipient lists, you receive a segmented evaluation in the chart.
4. Click **Close**.
5. Move the pointer over the added analysis item and click the desired chart symbol: .

Recipient list field

Limitation

1. Drag the analysis item from the left action area to the **Limitations** area.
2. Enter an optional name for the limitation. If you are using multiple analysis items of the same type, names help you differentiate them.
3. In the list, select the desired recipient list field (for example, *country, age, modified*). Depending on the file type, you can configure discrete values, value ranges, or intervals:

   - **Text fields**. Enter a value to use as the filter for the selected recipient list field, such as France.

     - You must enter the value *exactly* as specified in the recipient list (including capitalization).
     - To filter the recipient list field by up to 10 filters, click **Add** and enter another value. Repeat for values that you want to use as filters.

   - **Numeric fields**. In the list, select whether you want to display a multiple selection, an interval, or a threshold value.

     - If you selected **Multiple values can be selected**, proceed as described in **Text fields**.
     - If you selected **Interval** or **Threshold** option, in the **Unit** field, enter a unit (for example, *years*) and a lower or upper limit in the following fields.
     - If you define a threshold value, also select whether you want to filter values above or below the threshold value.

   - **Date fields**. In the list, select a date field (such as *modified*) by which you want to segment the evaluation. Select the time interval later, in the detail view of the analysis.
4. Click **Close**.

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter an optional name for the chart. If you are using multiple analysis items of the same type, names help you differentiate them.
3. In the list, select the desired recipient list field for example, *country, age, modified*. Depending on the file type, you can configure discrete values, value ranges or intervals:

   - **Text fields**. In the box below, enter a value to use as the filter for the selected recipient list field, such as France.

- Enter the value *exactly* as specified in the recipient list (including capitalization).
- To filter the selected recipient list field by up to 10 filters, click **Add** 🔹 and enter another value. Repeat this step for values that you want to use as filters.
- If you enter multiple values here, you receive a segmented evaluation in the chart.

- **Numeric fields**. Define the value ranges (intervals) that you want to display in the chart, starting with the smallest segment. In the box after **Values lesser than or equal to**, enter a numerical value, such as `10`. Then, click **Add** 🔹 and add the next higher value range, such as `20`, `50`, `100`. Repeat until you define all value ranges.

    - You can define up to 10 values ranges per chart.
    - If you enter multiple value ranges here, you receive a segmented evaluation in the chart.

- **Date fields**. In the **Reporting period** list, select an evaluation period for the data: *within the last 7 days*, *8 weeks*, *12 months*, or *10 years*. You can also display values outside the selected evaluation period by checking the **Show values beyond the reporting period** box. In the chart, an additional segment for previous events and an additional segment for recipients without a corresponding event (*Remainders*) are displayed.

    Example: If you selected the reporting period **the last 12 months** for the recipient list field **Last changed**, with activated **Show values beyond the reporting period** option, 14 segments are displayed in the diagram.

    - one each for the last 12 months
    - another for recipients whose datasets last changed more than 12 months ago
    - one for recipients whose datasets have not changed since being created.

4. Click **Close**.
5. Move the pointer over the added analysis item and click the desired chart symbol: .

⊕ *Target group*

Limitation

1. Drag the analysis item from the left action area to the **Limitations** area.
2. Enter an optional name for the limitation. If you are using multiple analysis items of the same type, names help you differentiate them.
3. In the list, select the desired target groups.
4. Click **Close**.

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter an optional name for the chart. If you are using multiple analysis items of the same type, names help you differentiate them.
3. In the list, select the desired target group(s). If you enter multiple target groups, you receive a segmented evaluation in the chart.
4. Click **Close**.
5. Move the pointer over the added analysis item and click the desired chart symbol: .

Monetary value

> **Note:** You cannot use this item as a limitation.

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter an optional name for the chart. If you are using multiple analysis items of the same type, names help you differentiate them.
3. If you are using multiple post-click services, select a post-click service in the list below it. If you are only using one post-click service, this list is not displayed.
4. In the **Revenue field** list, select the post-click value that tracks sales. The name of this value can be different depending on the post-click service and configuration, such as *revenue*, *sales*, and so on.
5. Define the value ranges (intervals) that you want to display in the chart, starting with the smallest value. In the box after **Values less than or equal to**, enter a numerical value, such as 10. Then click **Add** and add the next higher value range, such as 20, 50, 100. Repeat this step until you define the desired value ranges.
   - You can define up to 10 values ranges per chart.
   - If you enter multiple value ranges, you receive a segmented evaluation in the chart.
6. Click **Close**.
7. Move the pointer over the added analysis item and click the desired chart symbol: .

Last action

> **Note:** You cannot use this item as a limitation.

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter an optional name for the chart. If you are using multiple analysis items of the same type, names help you differentiate them.
3. If you are using multiple post-click services, in the drop-down list, select a post-click service. If you are only using one post-click service, this list is not displayed.
4. Select the desired period in the **Reporting period** list.
5. Optionally, you can display values outside the selected evaluation period by activating the control box **Show values beyond the reporting period**. An additional segment with recipients whose most recent action took place further in the past than the selected period of time, and a segment with recipients that performed no action (*Remainders*) are displayed in the diagram.

   Example: If you selected the evaluation period **within the last 7 days**, then for the activated option **Show values beyond the reporting period**, nine segments are displayed in the diagram.

   - one each for the last 7 days
   - one for actions taken more than 7 days ago
   - one with recipients who performed no action (*Remainders*).
6. Click **Close**.
7. Move the pointer over the added analysis item and click the desired chart symbol: .

Frequency

> **Note:** You cannot use this item as a limitation.

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter an optional name for the chart. If you are using multiple analysis items of the same type, names help you differentiate them.

3. If you are using multiple post-click services, in the drop-down list, select a post-click service. If you are only using one post-click service, this list is not displayed.

4. Define the value ranges (number of actions) to display in the chart, starting with the smallest segment, for example, 0. Then click + and add the next higher value range, for example, 2, 5, 10. Repeat until you define all desired value ranges.

- You can define up to 10 values ranges per chart.
- If you enter multiple value ranges here, you receive a segmented evaluation in the chart.

5. Click **Close**.

6. Move the pointer over the added analysis item and click the desired chart symbol: .

Live Analytics detail view

The detail view shows limitations selected in the analysis accompanied by recipient segments as a chart. The upper right corner of the window shows the total number of recipients of segments and the analysis parameters. Use the **Save as target group** button to save the selected segments as a target group.

Displaying recipients

In the left column, at the top in each detail view of an analysis, use the **Show** drop-down list to choose between display options:

- **Potential recipients**. Potential recipients of the selected segments; that is, recipients from the recipient lists that correspond to the defined criteria. If you change the limitations of an analysis or select individual segments, the number of potential recipients is adjusted in real time. This number can include recipients who currently receive no mailings because they unsubscribed from the newsletter, exceeded the bounce limit, or are blacklisted.
- **Contacted recipients**. Recipients in the current selection who received at least one mailing. This does not mean that a campaign was sent with the segment shown in the analysis; it means that recipients were addressed using the same recipient lists and target groups as in the current analysis.

Activating limitations

The selected limitations are displayed in the left column. Refine or expand the displayed analysis by activating or deactivating limitations:

- **Entire limitation**. Clear to exclude the entire limitation.
- **Individual segments of a limitation**. Clear to exclude a segment from an analysis.
- **Interval or threshold value for numeric values**. To adjust the limitation interval or threshold value, move the slider for an interval or threshold value limitation.
- **Time interval for date fields**. To set or adjust the time interval, click the left date field and enter a starting date using the calendar. Then, click the right date field and enter an end date.

> ### Note: Limitations
>
> - If you select some limitations (not all), the number of potential recipients in an analysis decreases or remains the same.
> - If you select a limitation but the number of potential recipients does not change, the limitation is not relevant for the analysis.
> - If you select all limitations, the number of potential recipients increase, because all recipients from your client are considered.

Displaying ad-hoc segmentation

To receive the selected recipient segment, click a bar, point, or slice of the pie in a chart. The display of analysis data in the upper right changes to display the potential recipients and contacted recipients in the selected segment. If you created multiple charts in an analysis, the display changes in these charts too. Only recipients from the segment selected in the first chart are still displayed there.

You can now refine the selection of recipients by selecting an additional segment in these charts. After each selection, the display of the other charts adjusts to the refined selection.

> **Tip:** The order in which you make the selection does not matter. You can start with any chart then select a segment in the other charts.

Example: Recipient segment from an RFM analysis:

1. Recipients whose most recent action (*purchase, product view, abandoned shopping cart*) took place in the last 6 weeks are selected.

2. These recipients are further limited to ones who performed one or two actions in the last 12 months. Purchases, product views and abandoned shopping carts are evaluated here too.

3. These recipients are limited to those whose purchases exceeded €150 in the last 12 months.

Saving a segment as a target group

After you select the desired recipient segment, you can save it as a target group to address these recipients in a campaign.

> **Note:** If a recipient is included in multiple categories, the potential recipients displayed in Live Analytics may differ from the actual number of recipients. If you want to calculate the exact number of potential recipients, use the analysis feature in the **Create target group** window (see also **Target group analysis**).

To save a segment as a target group, perform the following steps:

1. Hover over the gray field in the upper right corner in which the analysis data is displayed. The field becomes active and highlighted.

2. Click **Save as target group**. The **Create target group** window opens.

3. In the **Target group definition** area, in the **Client** list, select the client for which you want to create the target group.

4. Click **Properties**.

5. Optionally, select a folder in which you want to save this target group.

6. The name of the target group is generated according to the scheme **Created from [analysis title] on [date] at [time]**. If you want to give it a distinct name, delete this and enter the desired name.

7. Optionally, enter a description of the target group.

8. Click **Create**.

You can now select the target group in a regular campaign (in the menu item **Smart Campaigns**), or in an automated campaign (in the menu item **Marketing Automation**) and create a campaign for these recipients.

Deliverability preview

The deliverability preview lets you check your mailing before dispatch, whether the contents are displayed correctly and whether your mailing has been classified as spam by the most popular email providers. Episerver works together with an external software service provider to analyze and create the deliverability preview.

Creating a deliverability preview

> **Note:** Deliverability previews have additional costs. For more information, contact customer support.

Prerequisite:

- Test recipient list (see Recipient lists)

To create a deliverability preview:

1. Open the start menu > **Analytics** > **Deliverability preview**.
2. Click **Create**.
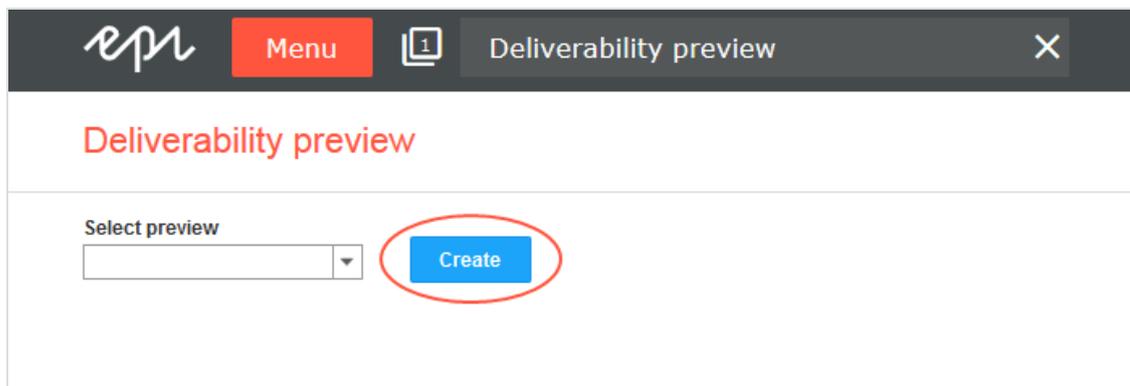
3. In the **Select mailing** drop-down list, select the mailing for which you want to create a deliverability preview.
4. In the **Select test recipient** drop-down list, select a recipient list.

> **Note:** Only use test lists and no real customer data. See also Recipient lists.

5. In the **Name** field, enter a name for the deliverability preview.

6. Click **Create**.

> **Tip:** The analysis and creation of the deliverability preview may take several minutes.

7. Click **Close**.

Viewing a deliverability preview

1. Open the start menu > **Analytics** > **Deliverability preview**.
2. In the **Select preview** drop-down list, select a deliverability preview.
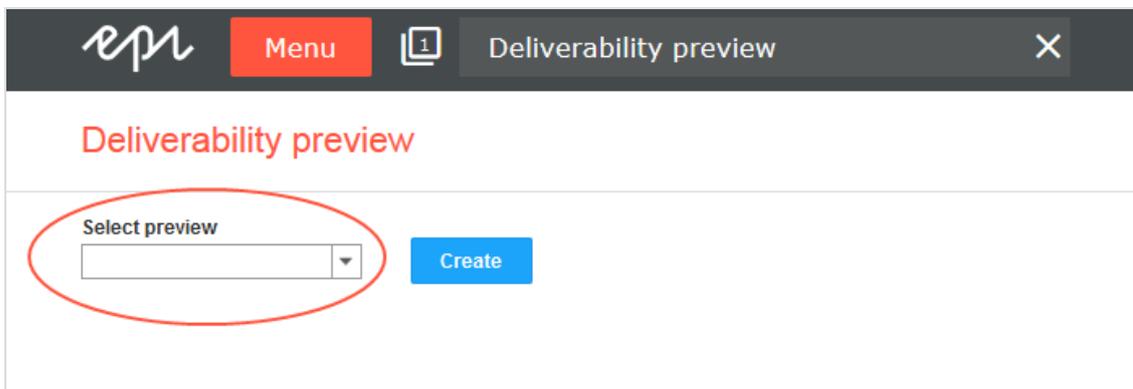
> **Tip:** The results may not display immediately. In the **Select Preview** drop-down list, you can check the progress of each analysis under **Status**.

The deliverability preview has two tabs:

- [Display](#)
- [Spam suspicion](#)

Display

The **Display** tab lets you preview how the graphics and fonts in your mailing are displayed by the most popular email providers and browsers.
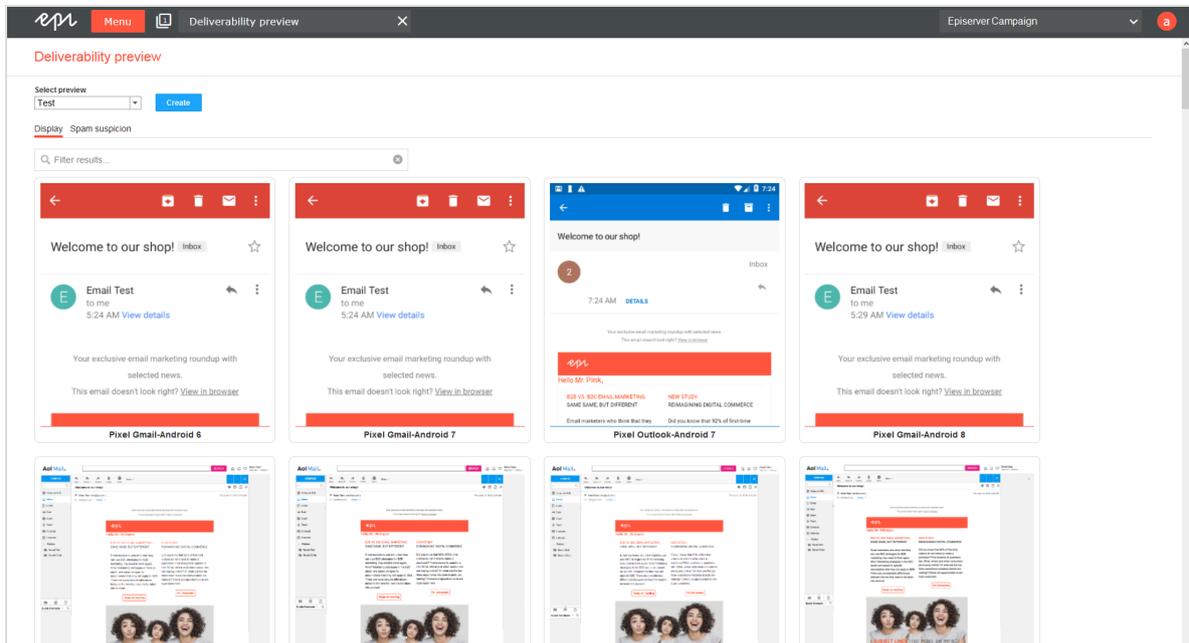
To filter the results, enter a search term in the **Filter results…** field.

> **Tip:** For example, enter *iPad* to check the appearance on Apple iPads, or enter *Gmail* for the Gmail email provider.

Click a thumbnail to display the respective image. For some images, you can change the format from **Portrait** (vertical) to **Landscape** (horizontal). Click the desired format in the upper left corner of the image.
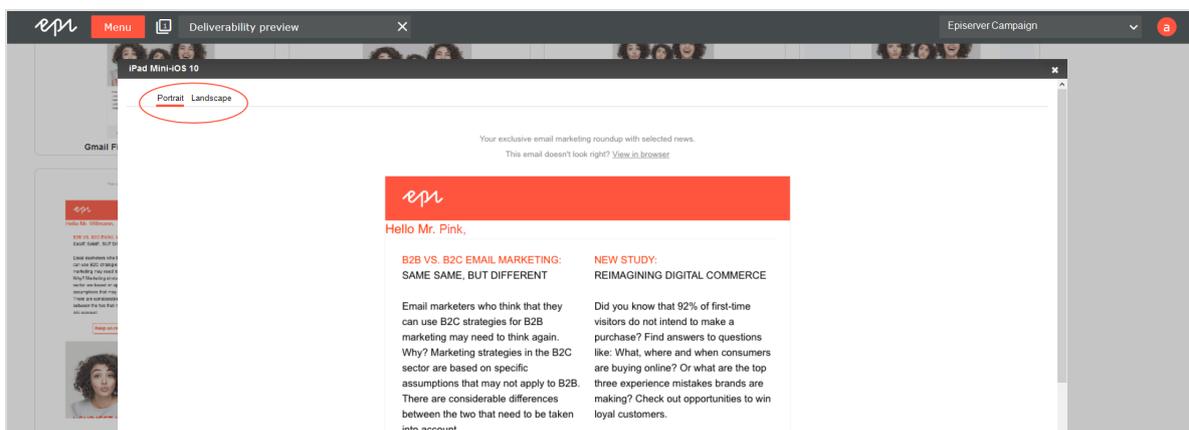
Spam suspicion

The **Spam suspicion** tab provides an overview of whether your mailing has been classified as spam by the most popular email providers.

- The red icon indicates that your mailing has been classified as spam.

- The green icon indicates that your mailing has arrived at the respective email provider.

- The violet icon indicates that no result is available yet.

If available, the spam score is also displayed and you can view further information on the spam filters by hovering over the info symbol . See also: Notes on spam filters of each client.

——Notes on spam filters of each client——

Client	Description
Inbox folder test	
Gmail	Gmail's spam filter is part of the standard Gmail service. Gmail is supported in all browsers and in several mobile applications. The test uses Gmail's default spam filter settings. In Gmail, recipients can manage incoming messages using filters that allow them to automatically label, archive, delete, star or forward an email, or keep it from entering the spam folder in the future. They can also add senders to the address book to prevent future emails to be sent to the spam folder. These options are not considered for this test.

Client	Description
	Note: Gmail's spam filters also work in IMAP clients. IMAP clients can be used on iPhone, iPad, Android, Kindle Fire, Thunderbird, Apple Mail, Outlook 2003, Outlook Express and others. This means that your email might have to pass a combination of two filters to access the inbox. Gmail recommends turning off any additional anti-spam or junk mail filters within those clients to improve performance. However, this is not enabled by default and some clients might not allow different spam settings for several accounts.
Outlook.com	Outlook.com's spam filter is part of the Hotmail service. The test uses Hotmail's default spam filter settings. Recipients can add senders to their address book to prevent that future emails are sent to the spam folder. This option is not considered for this test.
Outlook 2003, 2007, 2010, 2013, 2016, 2019	Outlook's spam filters are part of the respecting Outlook desktop client of version 2003, 2007, 2010, 2013, 2016 or 2019. The test uses Outlook's default spam filter settings.
Yahoo!	Yahoo!'s spam filter is part of the Yahoo! service. The test uses Yahoo!'s default spam filter settings. Recipients can add senders to their address book to prevent that future emails are sent to the spam folder. This option is not considered for this test.
Fastmail	Fastmail's spam filter is part of the Fastmail service. Recipients can add senders to their address book to prevent that future emails are sent to the spam folder. This option is not considered for this test.
GMX	GMX's spam filter is part of the GMX service. The test uses GMX's default spam filter settings. Recipients can add senders to their address book to prevent that future emails are sent to the spam folder. This option is not considered for this test.
Hushmail	Hushmail's spam filter is part of the Hushmail service. The test uses Hushmail's default spam filter settings. Recipients can add senders to their address book to prevent that future emails are sent to the spam folder. This option is not considered for this test.

Client	Description
Mail.com	Mail.com's spam filter is part of the Mail.com service. The test uses Mail.com's default spam filter settings. Recipients can add senders to their address book to prevent that future emails are sent to the spam folder. This option is not considered for this test.
Google Apps	Google purchased this service formally known as "Postini" and merged all of the functionality into its Google Apps offering. Since then, few information in regards to reasons for SPAM is available. Google Apps now only reports if an email is considered "Spam" or "Phishy". If an email is marked as "Phishy" it will also be marked as "Spam".
Apple Mail 10, 11	Apple Mail's spam filters are part of the respecting Apple Mail desktop client of version 10 or 11. The test uses Apple Mail's default spam filter settings.

Anti-spam filter test

Spam Assassin	The rating system of Spam Assasin consists of positive or negative scores, with positive values indicating "spam" and negative values indicating "ham" (non-spam messages). By default, Spam Assassin considers a score over 5 to reflect a probable spam message. However, this can be changed to a lower or higher value depending on the recipient's spam restriction preferences. • Score < 5 is recommended
Symantec Cloud	Symantec MessageLabs Email Security.cloud service combines advanced email antivirus, anti-spam, and content filtering capabilities in a solution that requires no on-site hardware or software. • Score < 7 is recommended
Barracuda	Barracuda is a Gateway Appliance which eliminates spam and virus intrusions while safeguarding an organization's reputation through content inspection based on policy for both inbound and outbound email. Barracuda Spam scores are as follows: • Score < 3.5 is recommended • 3.5 – subject line gets modified. • 6 – message gets blocked. • 10 – message gets quarantined.

Client	Description
Cloudmark	Cloudmark's spam filter is offered as an email client plug-in and gateway service. The test uses the default spam filter settings that is standard in either the plug-in or gateway service.
Symantec Messaging Gateway (formerly Brightmail)	Symantec Messaging Gateway service combines advanced email antivirus, antispam, and content filtering capabilities in either a hosted solution or a virtual appliance.

Validation test

SPF	Sender Policy Framework (SPF) is an email validation system designed to prevent email spam by detecting email spoofing by verifying sender IP addresses. SPF allows administrators to specify which hosts are allowed to send mail from a given domain by creating a specific SPF record (or TXT record) in the Domain Name System (DNS).
DKIM	DomainKeys Identified Mail (DKIM) is a method for associating a domain name to an email message, thereby allowing a person, role, or organization to claim responsibility for the message. The association is set up by means of a digital signature which can be validated by recipients.

Note: Episerver cannot view nor influence the parameters used to check the spam suspicion. The results of this analysis do not guarantee that your mailing will lead to the same ratings of a real mailing dispatch. The reputation of Episerver Campaign as an email service provider is not considered in the analysis.

Tip: To learn how to optimize your mailing, see Deliverability basics.

Post-click tracking integration

Note: This topic is for administrators and developers with administration access

> rights in Episerver Campaign.

Post-click tracking lets you analyze actions by email recipients on your website. You can see if a customer placed or canceled an order, viewed a product, and based marketing actions on this information.

To integrate post-click tracking and use collected data in email marketing, every visitor action must be assigned to a recipient with an email address. Post-click tracking and target groups include these functions:

- **Date and time range selection**. Configure post-click filters so that only post-clicks generated in a defined time range or at a specific date are matched.
- **Autocomplete for product names**. Input fields for product names or similar, are designed as drop-down lists or with an autocomplete function, to ensure correct entries when creating target groups.
- **Mailing-independent customer actions**. Import post-click data not assigned to a mailing, but with an email address. For example, if a new customer orders for the first time providing an email address, order details are available as post-clicks in the target group module when this customer registers for a newsletter.
- **Universal interface for integrating web analytics software**. Integrate almost any web analytics software in a unidirectional way, such as Google Analytics, eTracker, Adobe Analytics and Webtrekk.

> **Note:** To correctly associate post-click tracking with a recipient list, recipients must have at least a mailing ID and a recipient ID.

Setting up the integration

In your Episerver Campaign client

If post-click tracking is set up together with your client configuration, you can use one or more post-click services (this is either Episerver's post-click tracking or the web analytics software you are using) in one client. If you are not sure that post-click tracking is configured in your client, contact customer support. For each post-click service, the desired categories to be tracked are defined. Typical categories are *purchased products*, *viewed product*, *product group* or numeric values like *product price* or *revenue*. Use these categories to define target groups or evaluate the success of mailings.

On your website

The proprietary post-click tracking uses *tracking pixels*, a transparent image file (GIF) of one pixel width and height, which is loaded from a server when a customer clicks on a link. Loading of the file will not be noticed, and when done, the URL of the tracking pixel and attached parameters are submitted to the post-click tracking server.

The parameters represent the defined categories, the mailing ID (except for customer actions where no mailing is necessary), and the recipient ID, usually the email address. Integrate the tracking pixel on an appropriate page, such as the "thank you" page displayed after placing an order. The post-click tracking server stores the data in a database available to Episerver Campaign, together with the detected click time.

One tracking pixel can transmit up to 19 values (nine string values and ten numeric values). One parameter is reserved as an identifier, ensuring that each post-click is only tracked once, such as when a page is reloaded.

> **Tip:** If you use Google Tag Manager to implement tracking pixels on your website, you can set up a data transfer to Episerver Campaign by using post-click tracking. See Google Tag Manager.

Storing the SSL certificate

If the site where the tracking pixel is implemented uses an SSL certificate, the post-click tracking also needs this. To order and store the certificate on Episerver's server, provide Episerver with the following:

- **A domain**. Domain name, such as *example.com*, for which the certificate is issued.
- **A contact person from your IT department**. First name, last name, company name, address, CIP code, phone number, email address and fax address (if available).
- **A contact person for organizational issues**. First name, last name, company name, address, CIP code, phone number, email address and fax address (if available).
- **An administrative email address**. For administering the certificate, must have the same domain part as the domain the certificate is issued for. Example: If your domain is *newsletter.example.com*, the email address must be one of *admin@example.com*, *administrator@example.com*, *hostmaster@example.com*, or *webmaster@example.com*. Note that only the local parts **admin**, **administrator**, **hostmaster** or **webmaster** are allowed.

Technical implementation

A tracking pixel consists of an image URL, which is added to your website:

```
<img src="{url}" width="1" height="1" alt="" border="0">
```

The placeholder `{url}` must be replaced by the actual URL, to which the submitted parameters are attached.

Example: Replace *news.example.com* with your URL.

```
http://news.example.com/pc?mg=1234567890&bi=0&service=default
      &fvalue1=[product ID]
      &fvalue2=[number of items]
      &fvalue3=[price]
      &gvalue1=[category1]
      &gvalue10=[order number+product ID]
```

Parameters

- **mg** (mailing group) submits the ID of your Episerver Campaign client. If you do not know your client ID, ask [customer support](#).
- **bi** (browser identifier) is set to 0 by default. The user agent of the browser is used. If you have a proprietary implementation identifying the user agent, you can submit the value with this parameter.
- **service** identifies the post-click service to be used. In this example, the proprietary Episerver Campaign post-click tracking (**default**) is used.
- **fvalue1** to **fvalue10** can be used to submit ten different numeric values (example names in brackets).
- **gvalue1** to **gvalue9** can be used to submit categories (string values).
- **gvalue10** is reserved for the identifier, for example shopping cart ID. If multiple tracking pixels are used for each product, this identifier must also contain the product ID, to differentiate the tracking pixels.

> **Note:** The identifier is an indispensable parameter that assures the creation of unique post-click data. Missing or incorrect identifiers may cause data loss or incorrect sales figures.

Use cases

A common use case is tracking of sales figures like revenue, number of bought items, order number, and shopping cart ID. Place a tracking pixel on the order placement page. Only one tracking pixel is necessary. The URL, including attached parameters, is as follows:

```
/pc?mg=1461858149&bi=0&service=default&fvalue1=20.0&fvalue2=3&fvalue3=8866442211&gvalue1=
mark.spencer@example.com&gvalue10=1234567890
```

- /pc?mg=1461858149&bi=0&service=default&fvalue1=20.0 = **Revenue**
- &fvalue2=3 = **Number of bought items**
- &fvalue3=8866442211 = **Order number**
- &gvalue1=mark.spencer@example.com = **Customer's email address**
- &gvalue10=1234567890 = **Shopping cart ID**

For more data, you can load a tracking pixel for each item bought. The URL used for the tracking pixel is identical for each tracking pixel; only the attached parameters are different. With this setting, post-click data for product ID, product name, and price, can be submitted. The tracking pixel URL is the same as in the example above. An additional parameter with the product ID (fvalue) and/or the product name (gvalue) is submitted.

Working with post-click data

> **Note:** Third party web analytics programs

To create reports and analyses with third party web analytics programs, use the web interface of the respective program. See the respective user documentation for reporting options.

Analyzing and monitoring mailing campaign success

Use Episerver Campaign Deep Analytics to add a post-click measure to a report:

1. Create or edit a report template or an ad-hoc report, see Deep Analytics.
2. In the **Report data** tab, click **+ Add measure….** and then **Post click….**
3. In the **Name** box, enter a name for the post-click measure.
4. If using more than one service (provider), select the provider from the **Service** drop-down list.
5. In the **Value** drop-down list, select whether the measure you want to create is a number, a sum or an average.
6. If you have selected **Sum** or **Average** in the previous step, select a post-click value from the drop-down list. If you do not want to filter this value further, the definition can be saved. If you have selected **Number** in the previous step, no filters can be added.
7. To add filters, in the **Filter** area, click **Add +**.
8. In the **Category** drop-down list, click a post-click value/category and select an operator. Options depend on whether the selected post-click is a number or a string value.
9. Enter a reference value to compare the post-click value with.
10. Click **Apply** ✔ .
11. To add further filters values, click **Add +** and repeat the previous steps.
12. Click **Save**.
13. Continue editing the template/ad-hoc report as described in the user documentation, and execute the report.

Example: Create the post-click measure Men's fashion revenue

1. In the **Value** drop-down list, click **Sum** and then in the **of** drop-down list, click **Revenue**.
2. In the **Filter** area, click **Add +**.
3. In the **Category** drop-down list, click **Shop category** and select the **equals** operator.
4. Enter the reference value *Men's fashion*.
5. Click **Apply** ✔ .
6. Click **Save**.

Note: The example requires that a parameter with the **shop category** is passed in your tracking pixel.

Filtering target groups with post-clicks

Do the following to create a target group with a post-click filter:

1. Open the start menu and select **Recipients** > **Target groups**.
2. Click **Create**.
3. In the **Name** box, enter a name for the target group and in the **Target group** area, click **Add +**.
4. In the second drop-down list, click **Action**.
5. In the following drop-down list, click **has created post-click**.
6. If using more than one service (provider), select the provider from the **Service** drop-down list.
7. To only consider post-clicks created from mailings, select the mailing(s) from the **Mailing** drop-down list. If no mailing is selected, both mailings and actions not created from a mailing (customer actions) are considered.
8. Select a date or time in the **Period** drop-down list to select only post-clicks created within a defined time range or at a certain date. Time entered as a number of days ("Exactly 30 days ago") refer to the current day.
9. In the **Category** drop-down list, click a post-click value/category and select an operator.
10. Enter a reference value to compare the post-click value with.
11. Click **Apply** ✔.
12. To add further filters values, click **Add +** and repeat the previous steps.
13. Click **Create**.

Example: Create the target group "Buyers—Men's fashion"

To define a target group that contains buyers of men's fashion of the first quarter of 2019, do the following in the **Create target group** window:

1. In the **Name** box, enter *Buyers—Men's Fashion* and in the **Target group** area, click **Add +**.
2. In the second drop-down list, click **Action** and in following drop-down list, click **has created post-click**.
3. In the **Period** drop-down list, click **From…until…** and select the period from 1 January 2019 to 31 March 2019.
4. In the **Category** drop-down list, click **Shop category** and select the **equals** operator.
5. Enter the reference value *Men's fashion*.
6. Click **Apply** ✔.
7. Click **Create**.

> **Note:** The example requires that a parameter with the **shop category** is passed in your tracking pixel.

Visual link analysis

The Visual Link Analysis shows how often each link in a mailing is clicked. The analysis data is displayed directly over a screenshot of the original mailing to reveal correlations that might not be obvious, such as if recipients tend to click links in a certain area.

To create a visual link analysis, perform the following steps:

1. Open the start menu > **Analytics** > **Visual link analysis**. The **Visual link analysis** window opens.
2. Click the **Mailings** box and the mailing you want to analyze.
3. In the **Show click rate** drop-down list, click the type of clicks you want to analyze:
   - **All clicks**. Each click is counted, including multiple clicks from the same recipient.
   - **Unique clicks**. Multiple clicks from the same recipient on one URL are only counted once. If a recipient clicks on different links to the same URL (such as text and image), this is one unique click also, because not the link itself, but the URL to which it links, is decisive.

> **Note: Calculation of the unique click rate**
>
> The unique click rate for each link is calculated in relation to the total number of unique clicks on each link in the mailing. This differs from the unique click rate of the whole mailing, as given in the mailing report.
>
> In the Visual Link Analysis, one recipient can generate one unique click for each link in the mailing. The total number of unique clicks is usually higher than the total number of unique clicks as given in the mailing reports, because some recipients click various links in the mailing. The percentage of unique clicks for each link is calculated in relation to this number. Note that unique clicks in the overall mailing report and unique clicks in the visual link analysis are not identical, since they are calculated differently.

4. In the **Reference parameter** list, click the reference value you want to use to display the attractiveness of the individual links:

    - **Percent of all recipients**. Shows the clicks on a link in relation to recipients of the mailing.
    - **Percent of all (unique) clicks**. Shows the clicks on a link in relation to unique clicks on links of the mailing.
    - **Percent of all recipients/(unique) clicks**. Shows the clicks on a link in relation to unique clicks on links in the mailing and in relation to recipients of the mailing.

5. If your client is set up for post-click tracking, in the **Additional data** list, you can select the post-click option. It shows the post-click actions created from each link, such as the number of items bought. The data shown in this option depends on the kind of data tracked via post-click tracking.

6. Click **Show**. The visual link analysis is started.

7. To show only elements assigned to specific target groups, click **Target groups**, select one more target groups, and click **Submit selection**. In the background, a screenshot of the mailing is shown. Over each link, the respective numbers (clicks and percentages) are shown.

> **Tip:** You can switch between versions of your mailings by clicking the appropriate tab (**HTML**, **Mobile** and **Text**). Optionally, you can save the analysis result by clicking **Save result as image**.
>
> The box also has a color indicator: White means a link has not been clicked; yellow indicates a low click rate, orange medium click rate, while red means frequent click rate.

> **Note: Multiple links with the same link target**
>
> Multiple links to the same URL, such as an image and a text link, are not analyzed separately. That is, the total number of clicks/unique clicks is shown for each link item to the same URL. You cannot determine if recipients preferred clicking an image or a text link to the URL.

Visual link analysis of post-clicks

> **Note:** Contact customer support to activate this feature.

The visual link analysis feature displays a graphical representation of post-clicks. You can configure several post-click parameters, such as item price, item number, or total price. The selected parameters are displayed as a sum, average, or quantity. This allows various analyses to be visualized, such as:

- Total revenue generated by a link
- Average revenue generated by a link
- Number of orders resulting from a link

Attention analysis
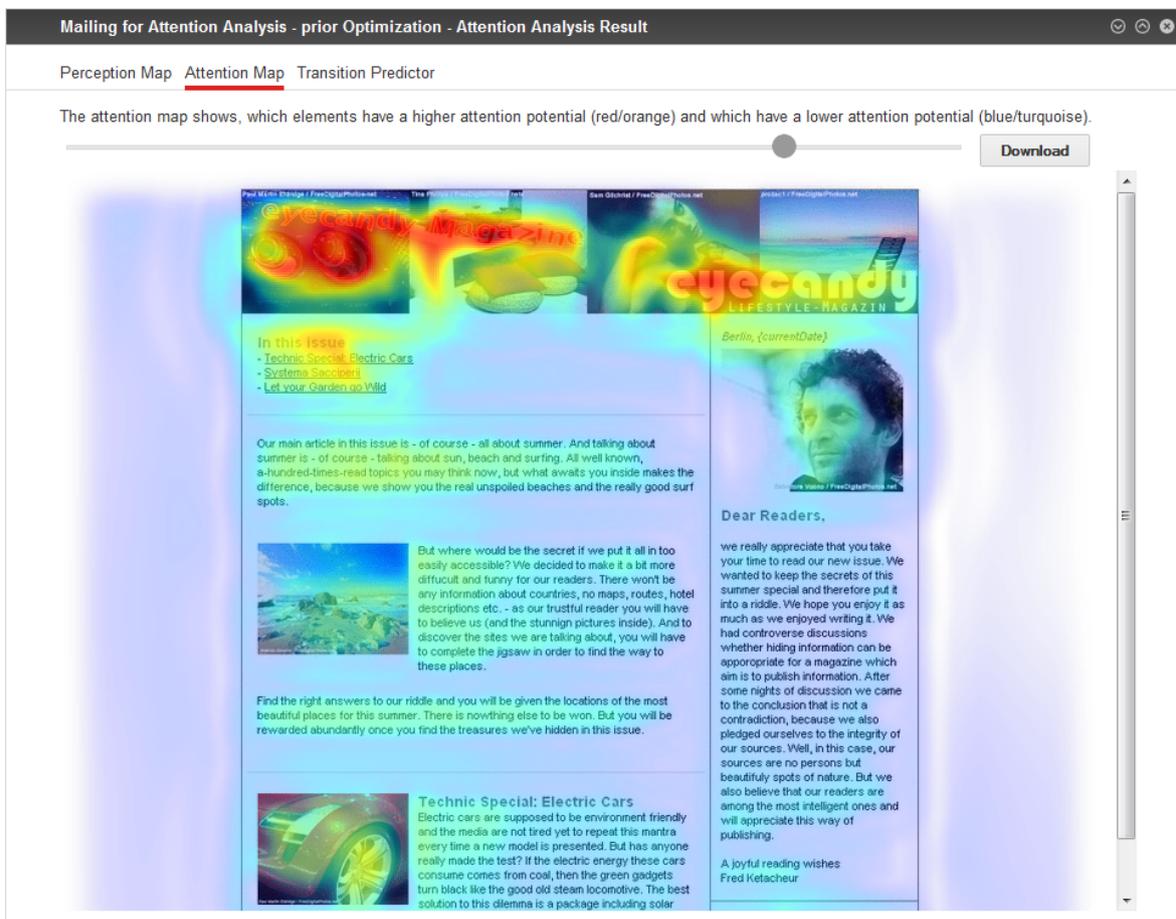
Test the usability of your mailings, templates or drafts before sending them out. The attention analysis provides a graphic that indicates if crucial elements (logo, call-to-action, promotional offers) are placed to immediately draw a viewer's attention.

To access Attention Analysis, open the start menu > **Analytics** > **Attention analysis**. The overview shows how many analyses you created, and a list of created and requested analyses.

What is attention analysis?

Attention analysis forecasts the first seconds of viewing a mailing. Like any image, upon first glance, an email scanned by the human eye. During scanning, the focus rests several times on the fixation points. Image information is processed subconsciously at this time. The Episerver Campaign attention analysis is not a semantic analysis; that is, it does not analyze the meaning of words, the content of images, and so on. It analyzes visual, physical stimuli and deduces how much attention each item and area of the image receives. The result helps to optimize size, color, and placement of items to make them more eye-catching.

Attention analysis is applicable for mailings and landing pages. Each analysis consists of more than 50 image properties, such as colors, brightness, contrast, size, position, color saturation, outlines, and textures. This data is processed to forecast the viewing behavior. The forecast model was designed using attention signatures of real, test persons. WhiteMatter Labs develops and verifies this model constantly.

The first impression counts

It is a daily challenge to optimize mailings to achieve higher conversion rates. A recipient spends only a few seconds looking at and reading an email newsletter, which is the time you have to arouse interest, communicate crucial information, and create stimulus to click a link. The path from the inbox to the **To payment** button in an online shop consists of many steps to optimize. You should consider each step carefully to make email marketing an advanced and powerful marketing tool. Attention analysis let you analyze and optimize what used to be a blind spot for marketers – the initial and subconscious attention a recipient pays to an email newsletter.

- What is perceived in the first seconds after opening a mailing?
- Where does the recipient look first, and which items most attract attention ?

Before a recipient reads the text and looks at the images of an email, complex neuronal processes control the attention and determine later behavior. Whether a recipient finds an email interesting and continues reading does not depend on the actual content alone, but on the appearance of an email, on perception paths, and the eye-catching potential of its items. Attention analysis analyzes, based on a scientific model and mathematical algorithms, how a recipient perceives an email in the very first moments, spots where eyes his fixate, and which areas catch attention.

Revolutionary testing

Attention analysis is based on the EyeQuant Software developed by WhiteMatter Labs. WhiteMatter Labs is a spin-off founded by Prof. Dr. Peter König, one of the leading European neuroscientists from the University of Osnabrueck. WhiteMatter Labs makes the results of long-term fundamental research usable in marketing.

Until this time, analyzing user behavior meant conducting expensive eye tracking studies with large sample sizes. With EyeQuant, real test persons are no longer necessary. Neuroscientific models allow forecasting of viewing patterns within seconds. The attention analysis is specifically developed to analyze newsletters, websites, and related items. The seamless integration in Episerver Campaign lets you run Attention Analysis as an part of a continuous optimization process for mailing campaigns:

- Evaluation of different design drafts at the first stage
- Pre-test of templates, landing pages and micro sites
- Testing of special design elements in the course of perception

Validity

The forecast model of attentional deployment is based on a statistical evaluation of more than 15,000 tested images. The viewing behavior of more than 300 test persons is analyzed to create attentional signatures and to calibrate the model. A comparative study with empirical eye tracking data on the predictive power has found a high correlation of both – empirical data and computed data. While eye tracking studies reached a predictive accuracy (that is, correlation of forecast and effective eye movement) of approximately 90%, automatically created attention analyses reached about 85%.

Predictive power (in percent)

red = EyeQuant model
gray = Eye tracking study
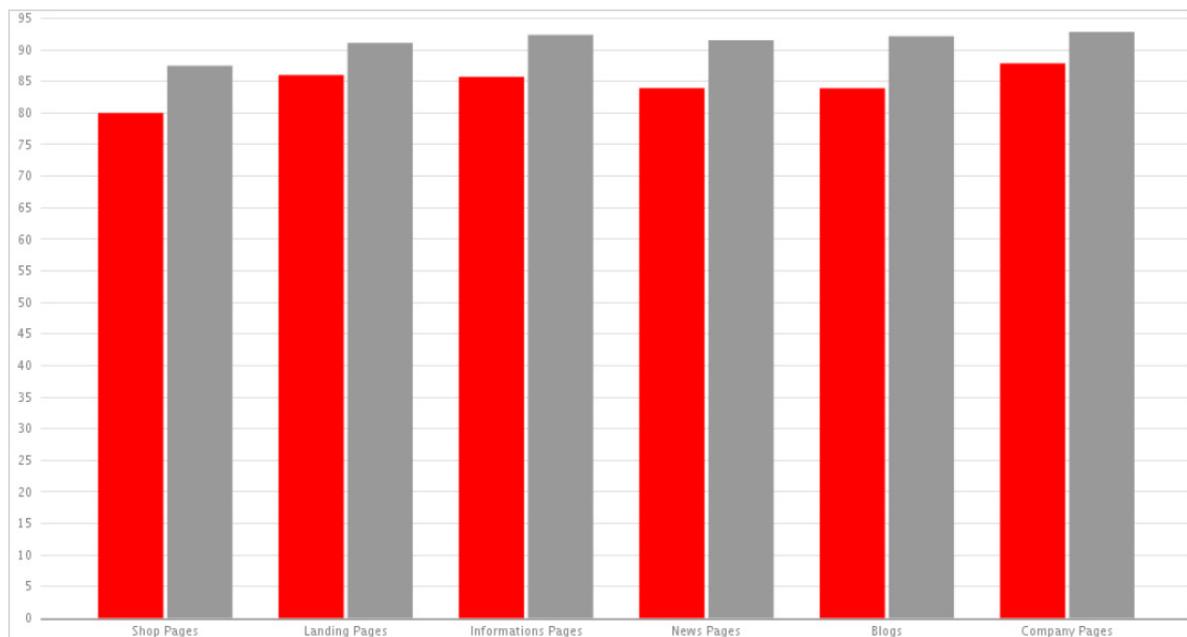
Analyzing a screenshot

> **Note:** Attention analyses have additional costs. For more information, contact [customer support](#).

1. In the **Attention analysis** window, click **New analysis**. The **New attention analysis** window opens.
2. Click **Screenshot upload** and then **Select**.
3. Click **Browse…** and select the screenshot from your local hard disk.
4. Optionally, enter a description of the analysis and click **Preview**.
5. If you are satisfied with the screenshot shown in the preview, click **Start analysis**.

- Maximum file size: 5 MB
- Supported formats: PNG, JPEG, BMP and GIF
- The image is scaled automatically. This may result in very small images, for instance if the original page orientation is an extreme portrait.

Analyzing an existing mailing or landing page

Note: Attention analyses have additional costs. For more information, contact [customer support](#).

1. In the **Attention analysis** window, click **New analysis**. The **New attention analysis** window opens.
2. Click **Mailing** then **Select**.
3. In the mailing overview, select the mailing you want to analyze. To analyze a landing page, you must also select the mailing with which it is associated.
4. In the **Mailing part to analyze** area, in the list, select the mailing or the landing page. If you have not created any landing pages for your mailing, the mailing is the only option in this list.
5. Optionally, enter a description of the analysis and click **Preview**.
6. If you are satisfied with the screenshot shown in the preview, click **Start analysis**. After a few seconds, the analysis is available. You can select between the following modes:
   - **Perception map**. The first layer of the attention analysis shows which areas gain most attention in the first moments of perception. These areas should contain logos, specially formatted product information, and so on. Small areas mean more focused attention, while larger areas indicate a more dispersed attention. Images with little contrast in color and brightness probably disperse the initial attention more widely.

- **Attention map**. The second layer analyzes the attentional potential of the elements in the overall context of the mailing. Red and yellow areas indicate a high attentional potential, while blue and turquoise areas indicate a low attentional potential. Items with red and blue parts have a high attentional potential, because they are perceived as one item. As said above, a high contrast between an item and the background leads to a more focused attention.

> **Tip:** Attention analysis is based upon universal laws of perception. But some aspects, such as the perception of an image from above left to below right, are cultural patterns so only apply to occidental viewers.

Displaying a previously-generated analysis

1. Open the start menu > **Analytics** > **Attention analysis**. The overview displays generated analyses.
2. To view the result, click an analysis in the **Analyses** list, then either Perception map or Attention map.

Interpreting results

Attention analysis gives useful indicators on how to optimize mailings or landing pages:

- Are products you want to promote in the newsletter eye-catchers?
- Is the product information (description, image, price) properly placed and grouped?
- Are the calls-to-action integrated in the perception path, so a viewer can follow them easily?

Too much attention might have a negative impact on the mailing performance:

- Less important items might be more eye-catching than other, more important items.
- The viewer might be distracted by too many items with a high attentional potential.
- Very eye-catching items might appear too blatant for certain recipients.

Optimizing options

- Strong contrasts of fore- and background attract the attention. Contrasts can be achieved through brightness (black/white) and through colors.
- Complementary colors (for example red/green) create a higher contrast and more attention than colors that lie closer in the color space.
- Images are more eye-catching when the background is masked and uncolored (high figure-background contrast).
- The general attention path in the occident goes from the top left to the lower right. You can follow this pattern or break it up intentionally using an eye-catching item.
- The left upper corner gains high attention. Usually, logos are placed here.
- A second area that gains particular attention lies between the left upper corner and center. This area is often the viewer's point of entry.
- Grouping eye-catching items with less eye-catching ones (relative positioning) can heighten the attention for all items. For example, to make an item more eye-catching, place it close to an item that receives a lot of attention.
- To heighten attention for an item, place it in a "calm" environment.
- Less is more. Few eye-catching items may be better than too many. The more eye-catching items you place in your newsletter, the more they compete against each other.

Optimization example

This sample newsletter, at first glance, is clearly structured and well-arranged. The title is eye-catching, but the attention analysis shows that only one of the three promoted products below receives some attention. The product price, although in red, is not focused on by the viewer:

Initial design

The analysis perception map shows a focus on the first product shown.

This is an optimized version of the same newsletter. Some changes are made: The price is positioned closer and top-left to the product. Instead of the red font, an inverted font, similar to the title, is used. These changes cause a significant shift of attention:

Optimized

The perception is equally distributed on the three products – a focus is on the prices.

Activity overview

> **Note:** Contact customer support to activate this feature.

The activity overview shows mailings for a defined period. The view's information helps you evaluate marketing activities, such as which customer dialogs you have sent, are currently sending, and are about to send. Transactional mails, registration confirmations and running Marketing Automations are also supported.

If your company has subsidiaries, branches, or affiliate companies, you can plan, steer, and control campaigns from your branches and associated companies using the activity overview.

The activity overview display has four areas:

- Area 1. Select one or more clients.
- Area 2. Select the period.
- Area 3. Filter mailings by mail type, media type, and mailing status.
- Area 4. The activity overview shows a content preview of a selected mailing, opens a campaign analysis, switches to the edit window of a selected element or pauses/deactivates a campaign or a mailing.

Area 1: Select client

1. Open the start menu > **Analytics** > **Activity overview**. The **Activity overview** window opens.
2. In the **Select clients** list, choose one or more clients to display in the overview.
   - The client you to which are logged in is selected. To stop analyzing this client, clear the corresponding check box.
   - If you want to select clients of your user account, select the check box on the upper left, in the list header.

Area 2: Select period

To select the period for which to display marketing activities, perform one of the following steps.

- Click a button: **last 30 days**, **last 14 days**, **last 7 days**, **current week**, **next 7 days**, **next 14 days** or **next 30 days**.
- Select the **Start date** and **End date** with the date selector.
- Drag the date slide to the desired start and end dates.

> **Note:** Entering a time period has no effect on the action data displayed (openings, clicks, bounces, subscription cancellations) nor on the number of recipients shown in the transactional mail and registration confirmation overviews. The action data displayed and the number of recipients represent the value for the entire time period in which a transactional mail or registration confirmation is, or was, active.

Area 3: Filter mailings and campaigns

To filter for campaigns and messages, media type, or mailing status, perform the following steps:

- **Campaigns and messages**. Select mailings or Marketing Automation campaigns.

> **Tip: Transactional mails** include Marketing Automation mailings. To include mailings from Marketing Automation campaigns in the activity overview, check the box next to **Transactional mails**.

- **Media types**. Select media types to include in the activity overview.
- **Mailing status**. Select the mailing statuses to include in the activity overview.

Area 4: Open activity overview and other features

If you selected at least one client, mailing type, media type and mailing status, the activity overview appears in area 4. The activity overview is automatically updated if you change settings in areas 1, 2 or 3.

The following buttons let you perform actions on the overview.

- **Preview**. Mark the mailing that you want the content preview to show and click **Preview**.
- **Analysis**. Mark the campaign for which you want to open the campaign analysis and click **Analysis**.
- **Edit**. Mark the element for which you want to open the edit window and click **Edit**.

> **Note:** This function only applies to mailings that have not been sent yet.

- **Pause**.

  - **Smart Campaigns**: In the **Smart Campaigns messages** overview, select messages in status **Sending**. Click **Pause**. Paused mailings can only be restarted in the Smart Campaigns overview of the corresponding client.

    > **Note:** Mailings that have not started yet will only be displayed if the corresponding campaign has a **Wait**- or **A/B test** node with a send date within the selected time period.

  - **Marketing Automation**: In the **Marketing Automation campaigns** overview, select campaigns in status **Running**. Click **Pause**. Paused Marketing Automations can only be restarted in the Marketing Automation overview of the corresponding client.

    > **Note:** The time period you selected in area 2 will be ignored when filtering Marketing Automation campaigns.

- **Deactivate**. In the **Smart Campaigns messages** overview, select mailings in status **Activated**. Click **Deactivate**.

  > **Note:** When deactivating a mailing, the complete campaign the mailing belongs to and all of the campaign's mailings will change status to **Activation required**. The campaigns can only be reactivated in the Smart Campaigns overview of the corresponding client.

Integration and interfaces

This section describes Episerver Campaign's integration options and interfaces. You can find information on how to link your online shop, CRM, web analytics program or product database with Episerver Campaign. Also, this section explains how to control Episerver Campaign from an external system.

- Episerver platform. Supporting the entire digital marketing chain.
- E-Commerce. Link to e-commerce systems.
- Web analytics. Link to web analytics applications.
- CRM. Link to CRM systems.
- Translation interface. Create multilingual mailings.
- Closed-loop Interface. Link to data warehouses.
- File exchange via SCP. Load files onto the Episerver server via SCP(Secure Copy Protocol).
- Webhooks (Beta). Real-time export of event data.
- API overview. Access specific information required for integrations.
- REST API. Configure and use the REST API (Campaign Developer Guide).
- SOAP API. Configure and use the SOAP API (Campaign Developer Guide).
- HTTP API. Configure and use the HTTP API (Campaign Developer Guide).
- SMTP API. Control dispatch via SMTP API (Campaign Developer Guide).

Episerver Platform

The Episerver Digital Experience platform offers an intuitive user interface for marketers and merchandisers who deliver campaigns. You can create, plan, and execute campaigns for multiple channels in one place. Episerver supports the entire digital marketing chain: from content creation, and omnichannel messaging, to campaign launch and follow-up.

Episerver CMS

Create campaign websites and landing pages, using multi-publish features for content items such as online forms, text, and media. Preview content components prior to launch, and schedule the publishing for a set time.

Episerver Commerce

The Commerce integration lets you import the latest product data into Campaign, and make catalog content available when adding product recommendations to mailings. The content interface paragraph imports product data such as offer texts and product images, from your e-commerce system into the Template Kit.

To get the product data into Campaign, you set up a periodic transfer of the latest product data from Commerce. For more information, see Commerce-Campaign integration on Episerver World.

Episerver Connect for Campaign

With this extension, you can connect Episerver Campaign with Episerver CMS and Episerver Forms, to collect visitor data entered in website forms, and pass that on to be used in mailings. For more information, see Connect for Campaign on Episerver World.

Episerver Insight

Episerver Insight is a user interface for viewing and filtering visitor profiles, and creating customer segments that you can use in your omnichannel marketing campaigns. The Insight information is based on tracking of online visitor behavior, such as viewing content or products. For more information, see Episerver Insight on Episerver World.

Episerver Reach

You can use Episerver Reach to create triggers for sending automated personalized emails through Episerver Campaign. These transactional mails are initiated by on-site actions of an email recipient, for example abandoning a shopping cart on an e-commerce site. For more information, see Personalization on Episerver World.

E-commerce integrations

E-commerce integration lets your Episerver Campaign client go hand-in-hand with your web shop and product management system. You can synchronize recipient data and import product data directly into your mailing template, using the power of Episerver's sending infrastructure. Registration of new recipients and management of your product data are carried out as usual in your e-commerce system. Data is synchronized automatically and imported into your Episerver Campaign client, making it easy to manage cross- and up-selling offers in mailings, or to design remarketing campaigns with personalized recommendations.

Episerver Commerce

Manage product content and discounts from one user interface, and import catalog content into Campaign. With the Campaign-Commerce integration you can import the latest product data into Campaign, and access catalog content when adding product recommendations to mailings. See **Episerver platform**.

Other e-commerce systems

Integration	Magento 1	Magento 2	Shopware	Spryker
Recipient management via Episerver Campaign	✓	✓	✓	✗
Recipient status synchronization	✓	✓	✓	✗
Product data import	✓	✓	✓	✗
Opt-in process via Episerver Campaign	✓	✓	✓	✓
Unsubscribe management via Episerver Campaign	✓	✓	✓	✓
Transactional emails via Episerver Campaign	✓	✓	✓	✓
	Setup	Setup	Setup	Setup

Magento 1 integration

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

If you are using Magento 1 as e-commerce platform, you can integrate this with Episerver Campaign and manage customer data via Episerver's email marketing platform. The entire recipient management, from registration to the opt-in process through to updating of the recipient data and unsubscriptions, is done in Episerver Campaign. The Magento 1 integration allows for sending of transactional mails and regular email campaigns via Episerver's server. You can also import product data into Episerver Campaign to display products in remarketing campaigns and recommendations.

Supported versions

Magento CE		Magento EE	
1.7	✓	1.12	✓
1.8	✓	1.13	✓
1.9	✓	1.14	✓

Installation

The installation should be carried out by an administrator or Dev operator. For the integration, you need to install the Episerver Campaign extension in Magento. You need at least **PHP 5.3** and **phpseclib 0.3.6** on your Magento server (the official distribution from Version 0.3.6.). You can install this via PEAR: http://phpse-clib.sourceforge.net/pear.htm.

Install the Episerver Campaign extension via the file system. You need an FTP connection to your server to transfer the installation package.

1. Unpack the ZIP archive containing the installation onto your local PC.
2. Establish an FTP connection to your Magento server.
3. Copy the **app** folder to your Magento server.

> **Warning:** Test the installation and configuration first in a non-production (live) environment.

Configuring in Episerver Campaign

When setting up your Episerver Campaign extension, certain data should be available for the configuration. If you are operating several store views, stores and/or websites with a Magento installation, see **Configuring multiple-clients**.

Log in to your Episerver Campaign client and select the required client. Copy the following IDs and codes:

- **Client ID**. Open the start menu and select **Administration** > **API overview** > **SOAP API** tab.

- **Authorization code**. Open the start menu and select **Administration** > **API overview** > **Recipient lists** tab. Select the required recipient list and click **Manage authorization codes**. If no code is set up for the selected list, click **Create authorization code**.
- **Opt-in ID**. Open the start menu and select **Administration** > **API overview** > **Opt-in processes** tab. Select the opt-in process that you want to use for the Magento store (see following section).
- **Opt-in link**. Edit the system mailing you are using for the registration confirmation (opt-in) of customers from your Magento shop and replace the default field function for the opt-in link: `{Double-Opt-In-Link}` with the parameterized string: `{Double-Opt-In-Link}?id={bmecssid}&code={bmecsscc}`

Customer support will further configure in Episerver Campaign. Episerver needs the following information from your Magento shop:

- **The IP address of your Magento shop**. This is stored in your client.
- **Forwarding email address**. Should be an administrative email address to where ARF reports, bounces, spam, auto-replies and responses are sent.
- **The transmission domain of your shop**. Must be delegated to Episerver and stored in your client as a transmission domain.

Importing recipient data

When setting up the integration, customer support sets up a recipient list with the standard fields from Magento in your Episerver Campaign client. The recipient list contains the following fields:

Field name	Data type	Description
email	String	Email address
salutation	String	User's title
firstname	String	First name
lastname	String	Last name
language	String	ISO code for the language from the StoreView via which the user has registered.
street	String	Street address
zip	String	Postcode or international ZIP code

Field name	Data type	Description
city	String	City
state	String	State
country	String	Country

Apart from the mandatory email address and automatic language, fields are optional. To receive the data, create an expanded subscription form or an edit-profile form and integrate this into your shop pages.

Adding and exporting additional recipient data fields

In Magento, you can add recipient data called customer attributes to save with the default recipient data and export the data to Episerver Campaign. Customer attributes let you adapt your sales approach. You can use customer attributes like any other default value to personalize newsletters or to create highly customized customer segments.

> **Note:** The function to add customer attributes (steps 1-7) is not available in Magento Community Edition. Instead, there are third-party extensions available that add this functionality to the browser.

1. Select **Customers** > **Attributes** > **Manage Customer Attributes**.
2. Click **Add New Attribute** and define first the **Attribute Properties**.
3. In the field **Attribute Code**, enter a unique internal name.
4. In the **Input Type** drop-down list, select the desired data type.

> **Note:** The export to Episerver Campaign only supports the field types *Text Field*, *Text Area*, *Date* and *Yes/No*.

5. Define the further settings for the customer attribute.
6. Click the **Manage Label/Options** tab and define the titles for the customer attribute, as you want them to be displayed in the admin back end and in the different languages of your shop. You must enter a title in the **Admin** field. If you leave the other fields empty, the **Admin** value is used for them as a default value.
7. Click **Save Attribute**.
8. Select **System** > **Configuration** > **optivo broadmail**.
9. Open the **HTTP-API** panel and, in the the **Customer Attributes to optivo** list, select customer attributes you want to export to Episerver Campaign. Use CTRL to select multiple attributes.

10. Click **Save Config**. The selected attributes are sent to Episerver Campaign at every HTTP API request.

11. To process the sent data, communicate the field names and types of the customer attributes to customer support who configure the recipient lists in your Episerver Campaign client. When this is done, you can access the customer attributes in Episerver Campaign as a recipient field and can be used to create personalized content or target groups based on these data.

Importing product data into a template

If you are configuring the product data export in Magento, you need a correspondingly equipped mailing template with a content interface to integrate the imported data into your mailings (for example in the form of recommendations or cross and upselling offers).

> **Note:** An individual template and the content interface are additional functions, subject to a charge, and are not part of the standard scope of supply for the Magento integration. For more information, contact customer support.

The Magento integration transfers the following product data to Episerver Campaign:

Field name	Data type	Description
id	Long	Product ID
name	String	Product title
category	String	Product category (final path)
description	String	Product description
short_description	String	Short description of the product
sku	String	Item number
product_url	String	URL to product landing page
price	String	Product price
special_price	String	Special price

Field name	Data type	Description
special_from_date	String	Offer valid from
special_to_date	String	Special valid until
base_image	String	Product image
small_image	String	Downsized product image
thumbnail	String	Thumbnail image

Configuring in Magento

Open the system configuration tool in Magento, then, in the **optivo** menu, select the menu item **optivo broadmail**.

> **Note:** If a 404 error message (Page not found) appears, log out and log back in again.

General

Open the **General** area and complete the fields using the data that you copied from your Episerver Campaign client in the previous step:
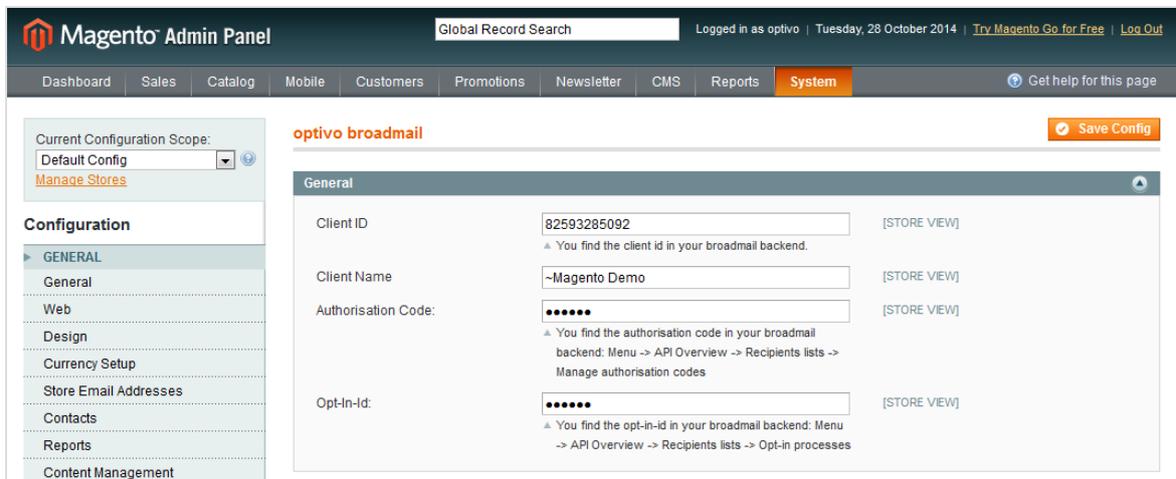
- **Client ID**. Client ID
- **Client Name**. Optionally, enter the name of your Episerver Campaign client. This is used for orientation purposes, because the client ID can be difficult to remember.
- **Authorization Code**. Authorization code
- **Opt-in ID**. Opt-in ID

HTTP API

Open the **HTTP-API** area, enter the confirmation page URL for the double opt-in, and enter the confirmation page URL for the unsubscription process in the second field.
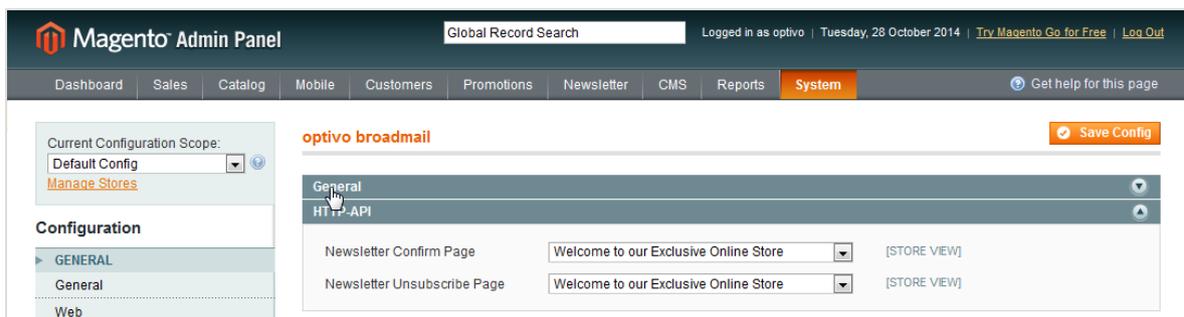
> **Note:** The CMS page for the confirmation (Newsletter Confirm Page) or unsubscription (Newsletter Unsubscribe Page) can also be a CMS page created specially for this case.

SMTP API

Open the **SMTP-API** area and select whether you want to use the Episerver Campaign SMTP-API to send transaction mails. If you have select **Yes** here, enter the appropriate data in the following fields:

- **User name of the API user**. Provided by customer support.
- **Password of the API user**. Provided by customer support.

You also have to configure the **Store Email Addresses** in Magento. Open the **Store Email Addresses** menu item and, for the email addresses specified here, specify the domain you have delegated to Episerver during the SMTP setup.

FTP API

Open the **FTP-API (Product Export)** area and select whether you want to activate the product data export as per Episerver Campaign. If you select **Yes** here, fill in the following data fields with the corresponding information:

- **User name of the API user**. This is provided by customer support.
- **Private key is encrypted**. Select **Yes** from the list of options.
- **Private key**. A key pair must be generated for data exchange via SFTP. See FTP access via SCP. Enter the private key here and inform Episerver of the public key.

- **Daily Export at**. Select the time at which the daily product data export should take place.

Transactional mail address

In the System configuration, in the **General** menu, select the **Store email addresses** menu item. Open the mailing address that you want to use for your transactional mails via Episerver Campaign and enter a sender name and a sender address. The mailing address **Sales representative** is used as standard for transactional mails (for example, order confirmations). You can also configure a different mailing address (such as *Adapted email 1*). To store this mailing address for transactional mails, go to the **Sales emails** menu item in the **Sales** area, and select the corresponding mailing address for each sales campaign.

> **Note:** The transmission domain for the transactional mails must be delegated to Episerver and also be stored in your Episerver Campaign client as a transmission domain. The administration of the delegated domains is carried out by Episerver. Do not use your shop's main domain (example.com), but instead set up a subdomain for transactional mails (transactions.example.com) and delegate this subdomain.

Configuring transactional mails

You can configure and send a transactional mail for shop actions (orders, shipments, changes to customer and shipping data and so on) using Episerver Campaign. Adjust or set up corresponding templates in your Magento shop to do this. To create a template:

1. Select **System** > **Transactional mails**. Transactional mail templates are now displayed in a table.

   > **Note:** The **Template Type** column shows whether a template is configured for sending using the Magento shop (template type: HTML) or using Episerver Campaign (template type: optivo). You can change the template type so that templates, that are configured for sending via the Magento shop, are sent using Episerver Campaign. To do so, go to step 6.

2. Click **Insert New Template** and from the **Load default template** area, select a template; empty templates cannot be created with Magento.
3. Select an area schema from the list below. This schema determines the formatting of prices and dates.
4. Click **Load template** to copy the content.
5. In **Template Information**, enter a name for the template. This name is only used internally.
6. Select the **send with optivo broadmail** check box. The two new fields **optivo authcode** and **optivo bmmailid** are now displayed.
7. In **optivo authcode**, enter the authorization code for the recipient list that should be used for the transactional mail.

   a. Open the start menu and select **Administration** > **API overview > Recipient lists**.
   b. Select the required recipient list and click **Manage authorization codes**. A new window opens that displays a list of authorization codes for the selected recipient list.
   c. Copy the ID of the desired authorization code and enter it into the corresponding field in Magento. If no authorization code is currently available, click **Create authorization code** to generate a new code.

8. In **optivo bmmailid**, enter the ID of the transactional mail in Episerver Campaign that you want to send with this transaction. The transactional mail must be set up in your Episerver Campaign client beforehand; see [Transactional mails](#).
9. Remove the HTML code from the **Template content** field.

10. Enter recipient parameters to transfer with this template to Episerver Campaign using the following format:

```
[parameter]={{var order.getOptivoBillingData('[variable]')}}
```

> **Note:** Replace the string [parameter] with the name of the parameter in Episerver Campaign, and replace the string [variable] with the name of the variable used by Magento for the order object. For example, the line `lastname={{var order.getOptivoBillingData('lastname')}}` sends the last name of the recipient to Episerver Campaign. See [Recipient and billing data](#) for a list of recipient parameters.

11. To add a parameter, start a new line.

12. In addition to the variables provided by the function `getOptivoBillingData`, you can also send the shop-specific standard variables to Episerver Campaign to use them in the transactional mail. Use the following format to do this:

```
[parameter]=[variable]
```

> **Note:** For each variable to be transferred, a corresponding field [parameter] is required in the target recipient list in Episerver Campaign. To insert a variable, click **Insert Variable…** and select the desired variable from the list. For example, the line: `resetPassword={{htmlescape var=$customer.password}}` sends a new password to the `resetPassword` field. This lets you send a transactional mail to a recipient who has requested a new password.

13. Likewise, enter order items that you want to send with this template to Episerver Campaign using the following format:

```
orderPositions={{var order.getOptivoProducts('product_id','sku','name','price','qty_
ordered)}}
```

The five standard parameters (*product ID*, *order number*, *name*, *price* and *quantity*) are sent using the above format. If you do not require one of these parameters, you can remove it from the schema. If you want to send additional order parameters, you need to program a custom template. See [Order details](#) for a list of available order parameters and notes about templates.

> **Note:** To carry out the programming, you need PHP knowledge and knowledge of the Magento object model.

14. Click **Save Template**.

> **Note:** The template is not activated when saved; that is, no transactional mails

are sent using it.
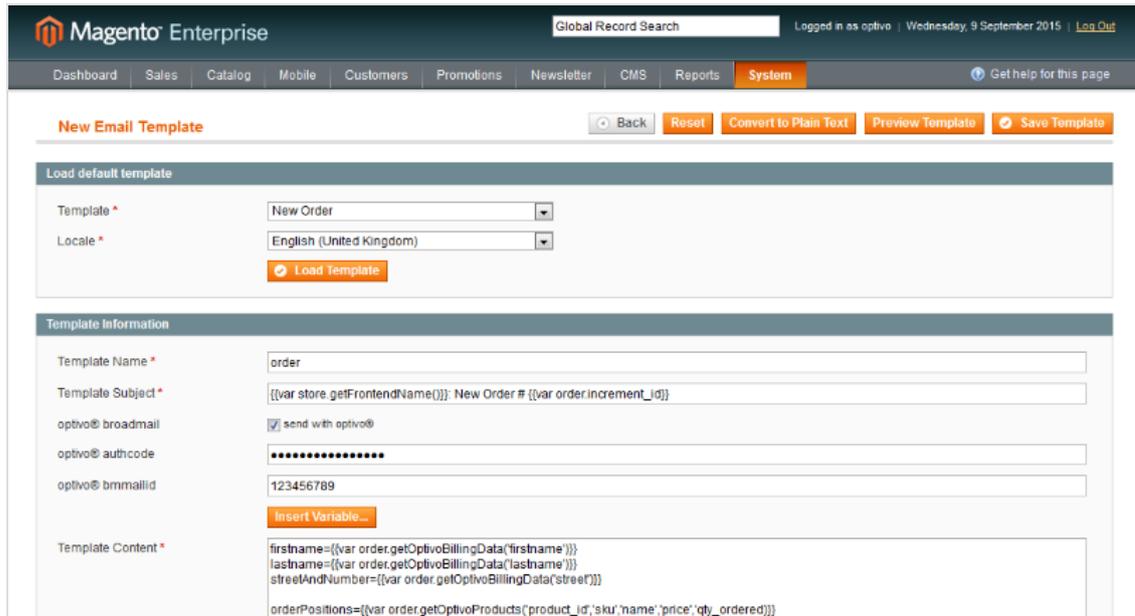
15. To activate the template and link it to an action, select **System** > **Configuration**.

16. Locate the **Sales** section in the menu on the left and click **Sales Emails**. This displays actions that trigger a transactional mail to be sent.

17. Open the panel for the desired action and select the desired template from the drop-down list (there is a template for each registered user and guest).
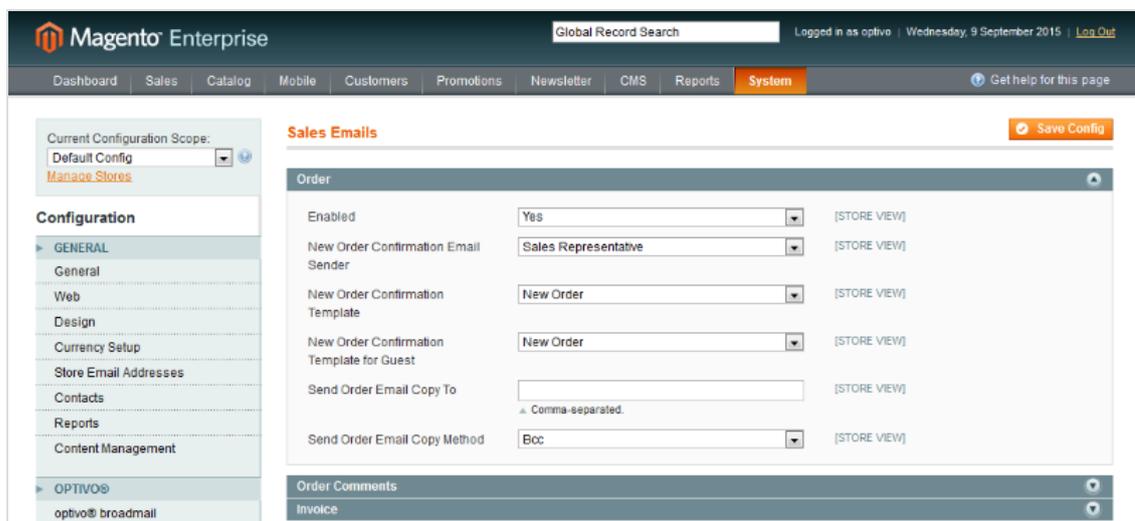
Configuring multiple clients

Magento and Episerver Campaign provide the option of displaying multiple clients. Configure each individual client exactly as described in the configuration sections. Ensure that the clients are allocated correctly in Episerver Campaign and Magento.

For each client, you need the client ID, client name, authorization code and opt-in ID. You can configure the confirmation pages for the opt-in and the unsubscription confirmation separately for each client, or you can use the same URLs for clients. The configuration for the SMTP-API and the FTP-API is global, and only needs to be carried out once.

> **Note:** To ensure that the clients are correctly allocated in Episerver Campaign and Magento, contact customer support to help you with the configuration.

Selecting a client in Magento

Clients are depicted in Magento via websites, stores and store views. See User Guide from Magento. The client selection section is at the top left-hand side of the configuration.
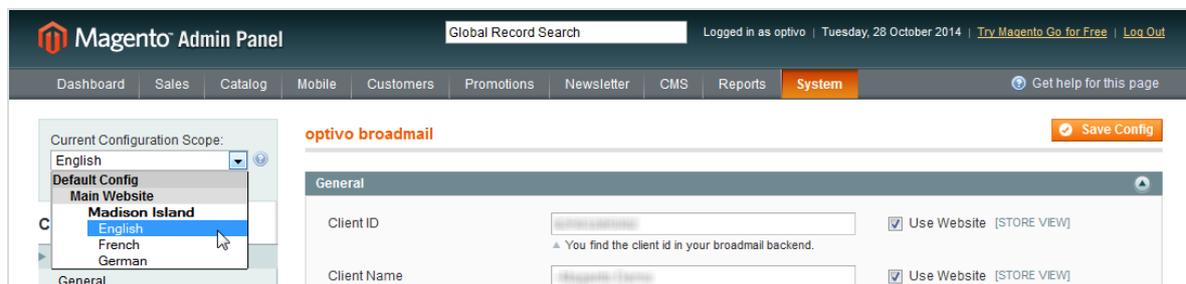
Integrating the subscription form

Subscription to your newsletter is performed via the online registration form on your shop pages. The registration data is transferred to Episerver Campaign by means of an HTTP request. The standard template for the subscription form can be integrated onto any CMS page. Connection to Episerver Campaign is automatic when you are using the standard template. For standard newsletter subscriptions, only the email address is requested in the standard form. Magento also automatically transfers to Episerver Campaign the language in which new subscribers are registered in the Magento shop. You can use this information to send newsletters in different languages, for example.

To request additional recipient data, you need an extended subscription form. For this type of form, you need extended programming knowledge in HTML. See Importing recipient data for information about the data that you can request and process with the integration.

Integrating the subscription form on a CMS page

1. In the top menu bar, go to the **CMS** menu item.
2. In the **Pages** overview, go to the **Manage content** menu item.
3. Select **Add new page** or edit an existing CMS page.
4. In the **Editor** field, enter the following code fragment:

```
{{block type="core/template" template="newsletter/subscribe.phtml"}}
```

5. Click **Save**, or **Publish**.
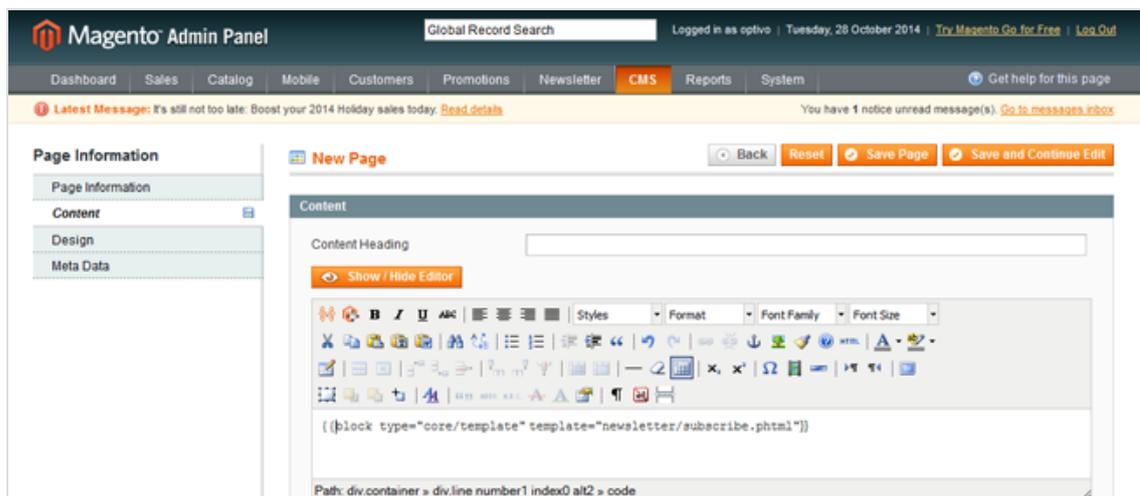
Integrating the subscription form on category pages

1. In the top menu bar, go to the **Catalog** menu item.
2. In the **Categories** overview, go to the **Manage categories** menu item.
3. Select the required category and a client (optional), and go to the **Own design** tab.
4. Enter the following code fragment in the **Editor** field. Your subscription may have a different column layout and positioning, so adjust accordingly.

```
<!-- Newsletter Box -->
<reference name="right">
<block type="newsletter/subscribe"
name="right.newsletter"
template="newsletter/subscribe.phtml"/>
</reference>
```

This code fragment integrates the subscription form into the right-hand layout column. If you want to integrate the newsletter into the left-hand column, replace the tag

`<reference name="right">` with the tag `<reference name="left">`

and replace the attribute `name="right.newsletter"` with `name="left.newsletter"`.

Depending on the integration and to ensure a correct display on different end devices, you also may make changes in CSS.

5. Click **Save**, or **Publish**.

> ### Note: Additional integration options
>
> This section listed only the possible integration options from the back-end. The integration can also take place almost everywhere via the Magento template system.

> These changes require design experience and access to the Magento installation file system.

Error handling

Activating Magento logging

By default, general logs are written to the *system.log* file, and errors and exceptions to the *exception.log* file. You can change these file names at `var/log/`.

Activate writing log files in Magento for error analysis.

1. Select **System** > **Configuration**.
2. Click **Progress** and then **Developer**.

3. Set the **Enabled** option to **Yes**.

Activating developer module

To analyze errors and ensure that effective logging is taking place, activate the developer mode in Magento via *.htaccess* or directly in the *index.php* of Magento:

```
62
63   if (isset($_SERVER['MAGE_IS_DEVELOPER_MODE'])) {
64       Mage::setIsDeveloperMode(true);
65   }
```

The log file for the Episerver Campaign extension is located in the `/var/log/` directory within the Magento installation. The name of the log file is *optivo_broadmail.log.*

Conflicts with other Magento extensions

There may be conflicts between the Episerver Campaign extension and other extensions if these extend the same Magento core functions. In particular, conflicts may occur in connection with other Magento extensions that also provide newsletter, SMTP or similar functions to the Episerver Campaign extension.

Furthermore, local code adjustments in the code pool local can lead to additional by-effects or side effects in the interplay.

During error analysis, pay attention to which extensions and in-house developments are integrated in the Magento installation.

> **Warning:** To prevent these types of conflicts and integration malfunctions, first install your Magento platform with the Episerver Campaign extension and other extensions being used onto a test system. Then, reproduce a range of different test scenarios there before carrying out the installation in a production environment.

Recipient and billing data

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

If you are using Magento 1 as e-commerce platform, you can integrate this with Episerver Campaign. The following recipient data is provided by Magento and, using a [transactional mail template](#), can be sent to Episerver Campaign. When configuring the template, the variables from Magento are each assigned to a recipient list field in Episerver Campaign. If you want to transfer variables that do not have a corresponding field in your transactional recipient list, contact [customer support](#).

Field name	Date type
entity_id	Integer
parent_id	Integer
customer_address_id	Integer

Field name	Date type
quote_address_id	Integer
region_id	Integer
customer_id	Integer
fax	String
region	String
postcode	String
lastname	String
street	String
city	String
email	String
telephone	String
country_id	String
firstname	String
address_type	String
prefix	String
middlename	String
suffix	String

Field name	Date type
company	String
vat_id	String
vat_is_valid	Boolean
vat_request_id	Integer
vat_request_date	String
vat_request_success	Boolean
giftregistry_item_id	Integer
country	String
salutation	String

Order details

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

If you are using Magento 1 as e-commerce platform, you can integrate this with Episerver Campaign. If you want to send more than the five standard order parameters (*product ID*, *order number*, *name*, *price* and *quantity*) provided by the function **getOptivoProducts** to Episerver Campaign, you can use a custom template that aggregates and calculates the required variables. This template is linked using the line:

```
{{layout area="frontend" handle="optivo_email_order_items" order=$order}}
```

and defined in the file **items.phtml**.

> **Warning:** To program the template, you need relevant PHP skills and good

knowledge of the Magento object model or order items. Any changes must be applied only after consultation with customer support.

Field name	Data type
item_id	Integer
order_id	Integer
parent_item_id	Integer
quote_item_id	Integer
store_id	Integer
created_at	Date
updated_at	Date
product_id	Integer
product_type	String
product_options	String
weight	Float
is_virtual	Boolean
sku	String
Name	String
Description	String

Field name	Data type
applied_rule_ids	String
additional_data	String
free_shipping	Boolean
is_qty_decimal	Boolean
no_discount	Boolean
qty_backordered	Float
qty_canceled	Float
qty_invoiced	Float
qty_ordered	Float
qty_refunded	Float
qty_shipped	Float
base_cost	Float
price	Float
base_price	Float
original_price	Float
base_original_price	Float
tax_percent	Float

Field name	Data type
tax_amount	Float
base_tax_amount	Float
tax_invoiced	Float
base_tax_invoiced	Float
discount_percent	Float
discount_amount	Float
base_discount_amount	Float
discount_invoiced	Float
base_discount_invoiced	Float
amount_refunded	Float
base_amount_refunded	Float
row_total	Float
base_row_total	Float
row_invoiced	Float
base_row_invoiced	Float
row_weight	Float
gift_message_id	Integer

Field name	Data type
gift_message_available	Integer
base_tax_before_discount	Float
tax_before_discount	Float
ext_order_item_id	String
weee_tax_applied	String
weee_tax_applied_amount	Float
weee_tax_applied_row_amount	Float
base_weee_tax_applied_amount	Float
base_weee_tax_applied_row_amnt	Float
weee_tax_disposition	Float
weee_tax_row_disposition	Float
base_weee_tax_disposition	Float
base_weee_tax_row_disposition	Float
locked_do_invoice	Boolean
locked_do_ship	Boolean
price_incl_tax	Float
base_price_incl_tax	Float

Field name	Data type
row_total_incl_tax	Float
base_row_total_incl_tax	Float
hidden_tax_amount	Float
base_hidden_tax_amount	Float
hidden_tax_invoiced	Float
base_hidden_tax_invoiced	Float
hidden_tax_refunded	Float
base_hidden_tax_refunded	Float
is_nominal	Integer
tax_canceled	Float
hidden_tax_canceled	Float
tax_refunded	Float
event_id	Integer
giftregistry_item_id	Integer
base_tax_refunded	Float
discount_refunded	Float
base_discount_refunded	Float

Field name	Data type
gw_id	Integer
gw_base_price	Float
gw_price	Float
gw_base_tax_amount	Float
gw_tax_amount	Float
gw_base_price_invoiced	Float
gw_price_invoiced	Float
gw_base_tax_amount_invoiced	Float
gw_tax_amount_invoiced	Float
gw_base_price_refunded	Float
gw_price_refunded	Float
gw_base_tax_amount_refunded	Float
gw_tax_amount_refunded	Float
qty_returned	Float

Magento 2 integration

Note: This topic is for administrators and developers with administration access rights in Episerver Campaign.

If you are using Magento 2 as e-commerce platform you can integrate this with Episerver Campaign to take advantage of your e-commerce and customer communication marketing activities.

With the Magento 2 integration, customers can subscribe/unsubscribe to newsletters directly in your shop. The integration transfers customer data received during registration to Episerver Campaign so that you can use the information to personalize emails. You can also automatically send transactional mails like order confirmations and invoices. When registered customers change their data in the shop, customer data is synchronized. The integration also lets you transfer the product catalog to Episerver Campaign daily.

The Magento 2 integration supports multiple clients, and the connection of several shops to Episerver Campaign.

Feature range and supported versions

Feature	Magento 2.0 – 2.2 (Community Edition)	Enterprise Edition
Newsletter subscription and unsubscription	✓	On request
Transactional mails via HTTP API and SMTP API	✓	On request
Export product catalog into Episerver Campaign	✓	On request

Setting up in Episerver Campaign

To set up the Magento 2 integration, contact customer support to get the integration software package.

Provide Episerver with the following information:

- The version number of your Magento 2 system.
- The recipient list structure for your newsletter recipients. Let Episerver know if you want to add additional fields.

The Magento 2 integration offers two ways to send transactional mails via Episerver Campaign:

1. **Via the HTTP API**. When you want to use the Episerver Campaign templates for your transactional mails. Episerver requires the transaction recipient list for your transactional mails. Episerver provides a default template for the transaction recipient list structure that is suitable for many applications/scenarios. Episerver can discuss with you whether the standard template meets your requirements. See Transactional mails via HTTP API.

2. **Via the SMTP API**. When you want to use the Magento 2 templates for your transactional mails and Episerver Campaign only for sending. If you want to use the SMTP API, provide the IP address of your web shop for configuration purposes. See Transactional mails via SMTP API.

- For product catalog export to Episerver Campaign, you must have a user account on the Episerver server. If you do not, one can be arranged for you. As part of the installation, Episerver requires a **public key** and a **key fingerprint** from you to securely transfer the data. See File exchange via SCP.
- If you are running multiple shops (including sub-shops and shops that are localized in other languages), let Episerver know the number of shops you want to connect to; see Advanced configuration.
- If you are integrating multiple shops, you may need:

  - Separate clients for the individual web shops.
  - A separate client for your transactional mails.
  - Setup of a recipient-list-based newsletter subscription.

Installation

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to install the Magento 2 integration, if you are using Magento as e-commerce platform with Episerver Campaign.

Installing the integration package

> **Note:** To prevent problems and conflicts, first install and test the Magento 2 integration on a test system.

When you have received the integration software package (ZIP archive) from customer support, install it in Magento 2 as described in the following.

1. Unzip the ZIP archive.
2. Upload the unpacked folder to the directory **app/cod/Optivo/broadmail** in your Magento 2 system.
3. Clear the cache of the Magento 2 system.
4. Verify the successful upload of Magento 2 integration with the following console command:

```
php bin/magento module:status
```

If the upload is successful, the Magento 2 integration is displayed in the **List of disabled modules**.

5. Use the following console command to activate the Magento 2 integration:

```
php magento module:enable Optivo_Broadmail
```

Installing an update

If you receive an updated version of the integration from customer support, do the following to install the upgrade:

1. Unzip the ZIP archive.
2. Upload the unpacked folder to the directory **app/cod/Optivo/broadmail** in your Magento 2 system.
3. Use the following console command:

```
php bin/magento setup:upgrade
```

Uninstalling the integration package

Do the following to uninstall the Magento 2 integration:

1. Disable the Magento 2 integration by using the following console command:

```
php bin/magento module:disable Optivo_Broadmail
```

2. Clear the cache with the following console command:

```
php bin/magento cache:clean
```

3. Delete the Magento 2 integration files.
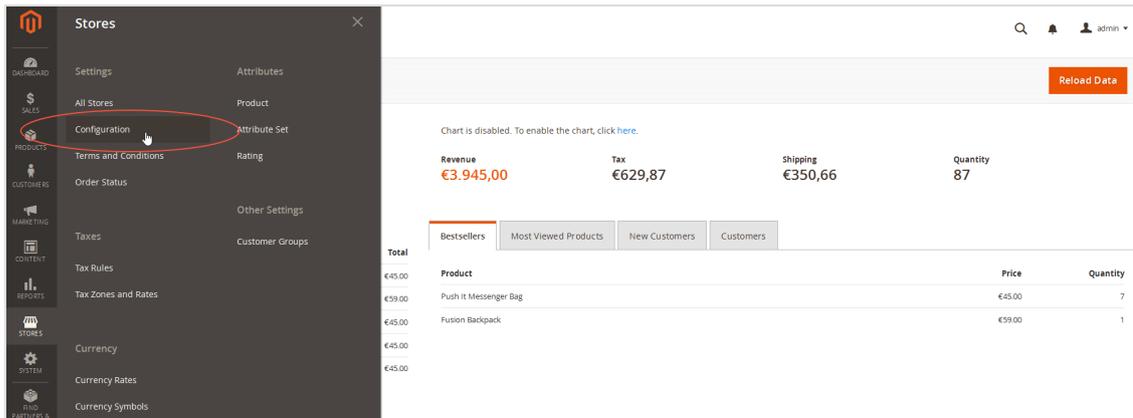
 Configuring the newsletter

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to configure the newsletter subscription/unsubscription feature, if you are using Magento 2 as e-commerce platform with Episerver Campaign. It also shows how to transfer other recipient data to Episerver Campaign, data that is not included in the standard configuration of the Magento 2 integration.

Configuration steps

1. Configure the opt-in mailing (registration confirmations) in Episerver Campaign, and then use a field function to reference the confirmation link to your shop.
2. Create two landing pages in Magento 2, one to display a successful newsletter subscription confirmation, and one to display a successful unsubscribe confirmation.
3. Store the client ID, the authorization code for the API access, and the ID of the opt-in process the shop.
4. Optional: Expand the recipient list structure, to transfer other recipient/customer data that is not included in the standard configuration of the Magento 2 integration.

Configuring the opt-in mailing

1. Log in to Episerver Campaign.
2. Open the start menu and select **Campaigns** > **Confirmations**.
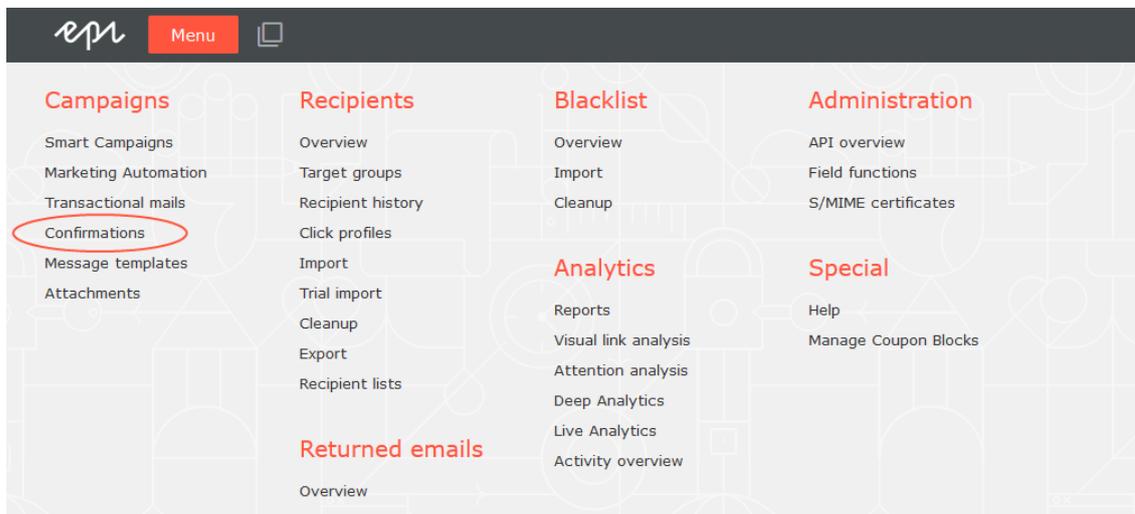
3. Select the opt-in mailing (which customer support has already prepared and stored in your client for the connection to your shop) by marking the relevant mailing in the list.

4. Click **Edit**.
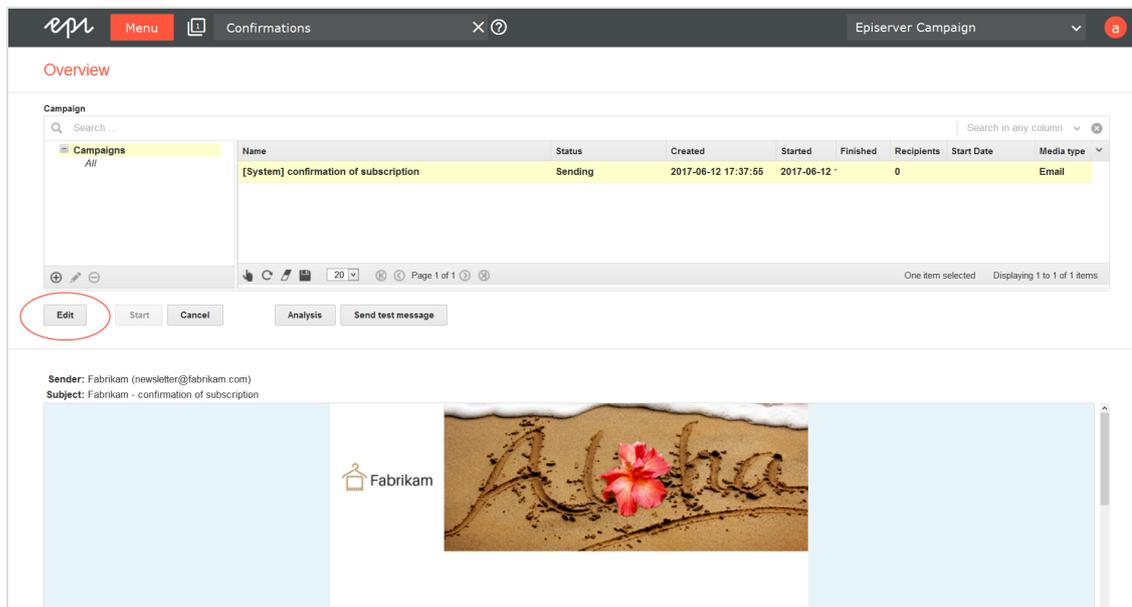
5. On the **Email** node, click **Properties** ✏.

6. Click **Edit content**.
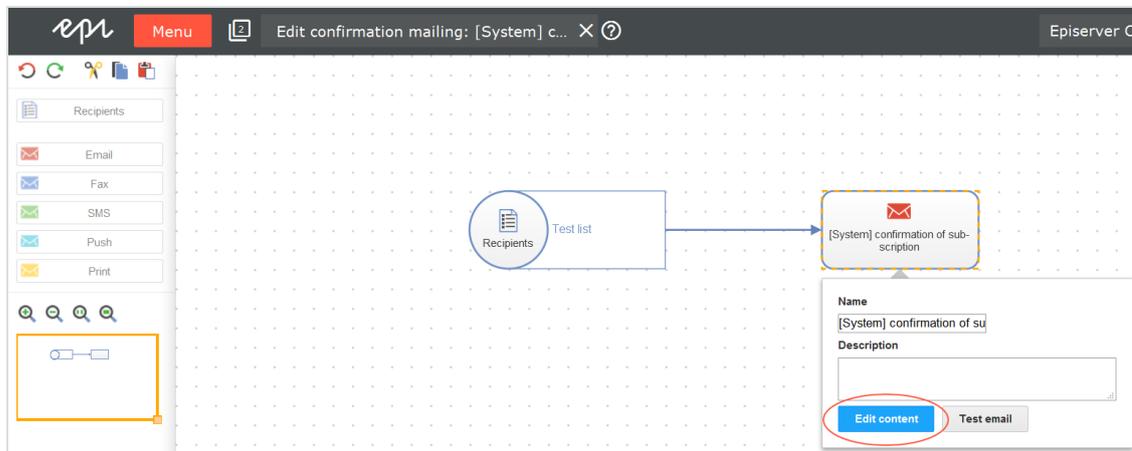
7. In the paragraphs that contain the registration confirmation link, click **Text/image**.
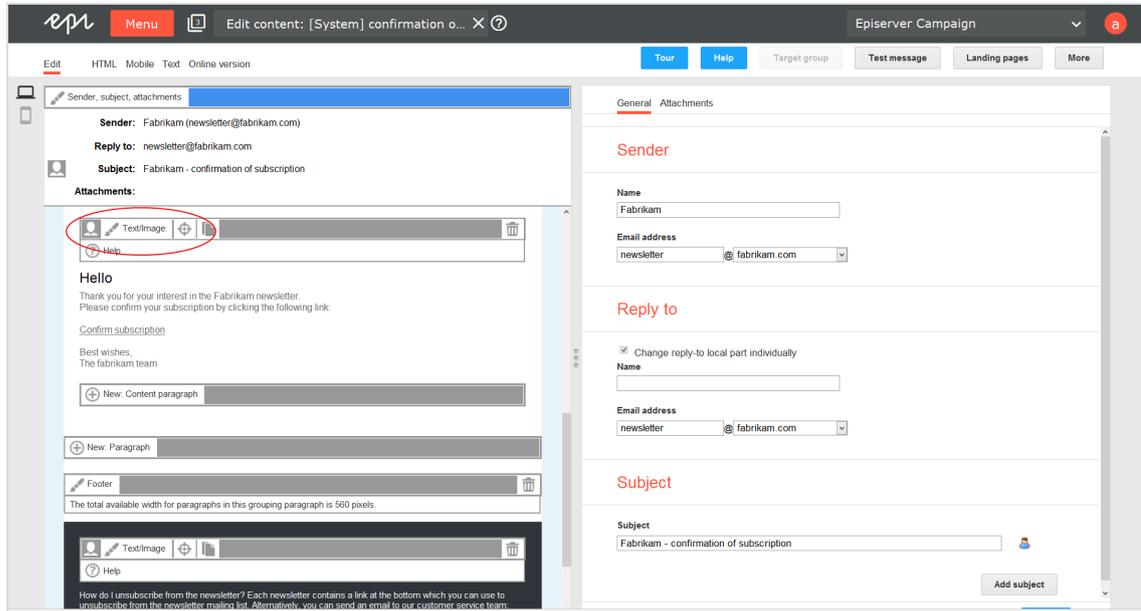
8. In the **Text** area, click **Source**.

9. Replace the existing link with the following code lines/field functions:

```
{Double-Opt-In-Link}?id=${user.data.bmecssid}&code=${user.data.bmecsscc}
```

You will find the link to be replaced in the <a> tag between the quotation marks.

Example

The following link is contained in the <a> tag in the source code:

```
<a href="http://srv2.de/subscribe.html">Complete registration</a>
```

Replace the link between the quotation marks as follows:

```
<a href="{Double-Opt-In-Link}?id-
d=${user.data.bmecssid}&code=${user.data.bmecsscc}">Complete registration</a>
```
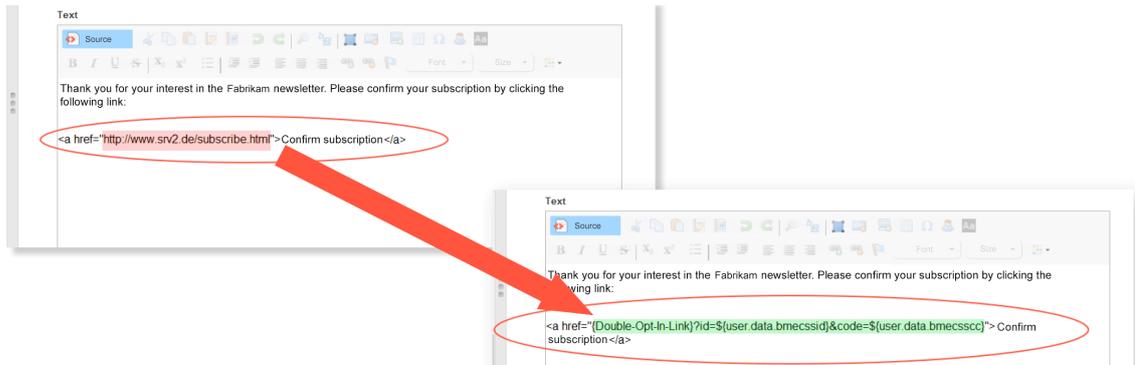

Note: The parameters **id** and **code** enable the Magento 2 integration to map to the data sets in your shop.

10. Click **Apply**.
11. Click **Close**.
12. Click **Save and close**.

Creating landing pages

1. Log in to Magento 2 with administrator rights.
2. Select **Content** > **Pages**.

3. Click **Add New Page**.

4. In the **Page Title** field, enter a name for the landing page.

> **Note:** Assign unique names to the landing pages, for example **Episerver Campaign opt-in confirmation** or **Episerver Campaign opt-out confirmation**.

5. Click **Content**.
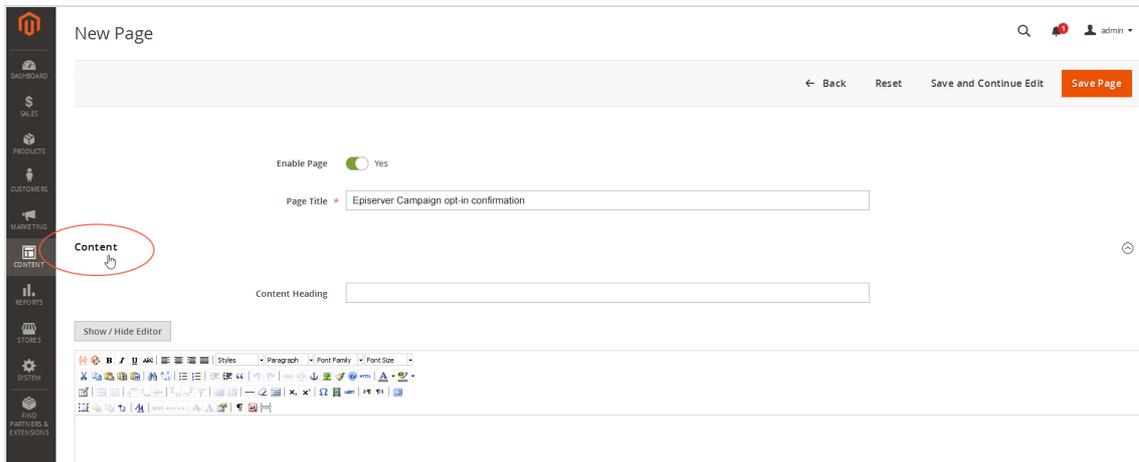
6. In the **Content Heading** box, enter the title that you want to display on the landing page.
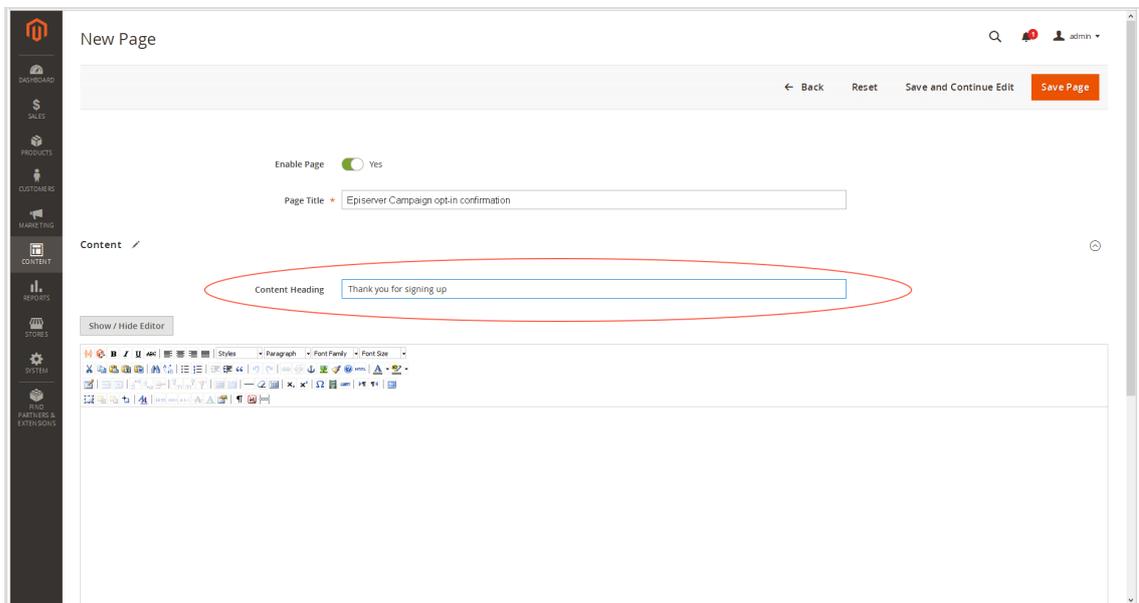
7. In the text box, enter the text that you want to display on the landing page.
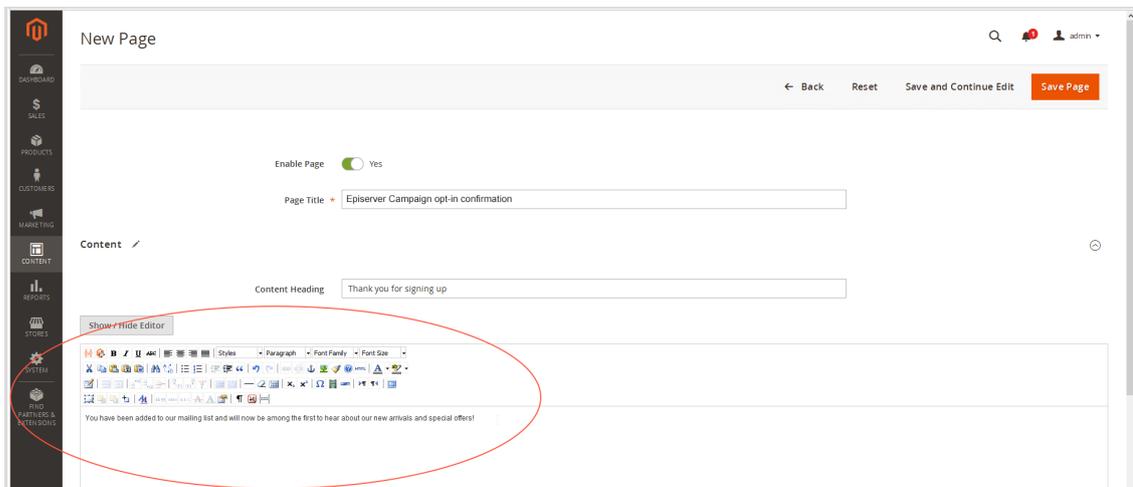
8. Optional: If required, change other settings on the form, such as layout adjustments under **Design**.
9. Click **Save Page**.
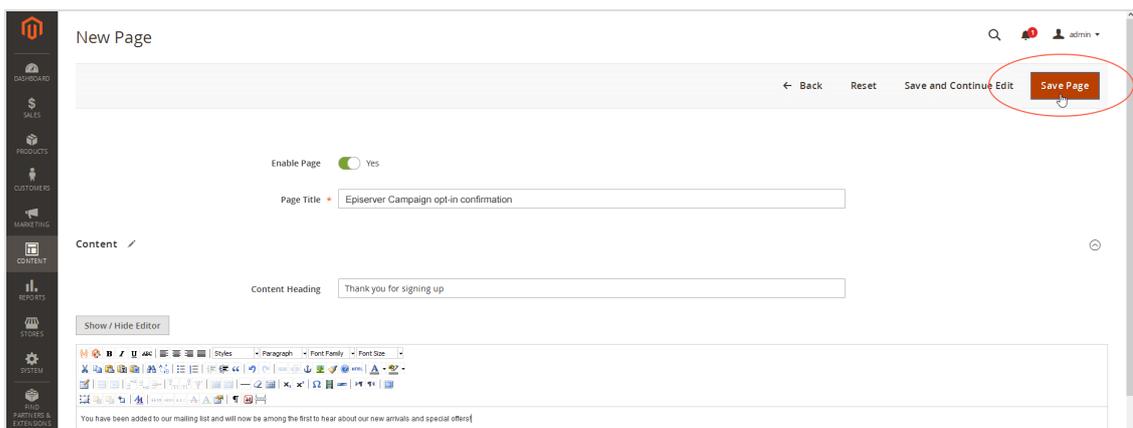
10. Repeat steps 3–9 for the second landing page you want to create.

Storing authorization code, opt-in, and client IDs

> **Note:** Do not confuse the recipient list for your newsletter recipients with the transaction recipient list for your transactional mails. Customer support will set up two different types of recipient lists for the sending of newsletters and the sending of transactional mails (for example order confirmations, invoices).

- **Authorization code**. For the Episerver Campaign recipient list (created for you by customer support and saved in your client). You can locate the authorization code in your Episerver Campaign client in the **API overview**. Open the **Recipient lists** tab and select the relevant recipient list. Click **Manage authorization codes** and copy the authorization code from the list. If no authorization code is available for the selected recipient list, click **Create authorization code**.
- **opt-in ID**. See **Opt-in processes** in the API overview to locate the opt-in ID.
- **client ID**. See **SOAP API** in the API overview to locate the client ID.

1. To store the parameters, log in to Magento 2 with administrator rights.
2. Select **Stores** > **Configuration**.
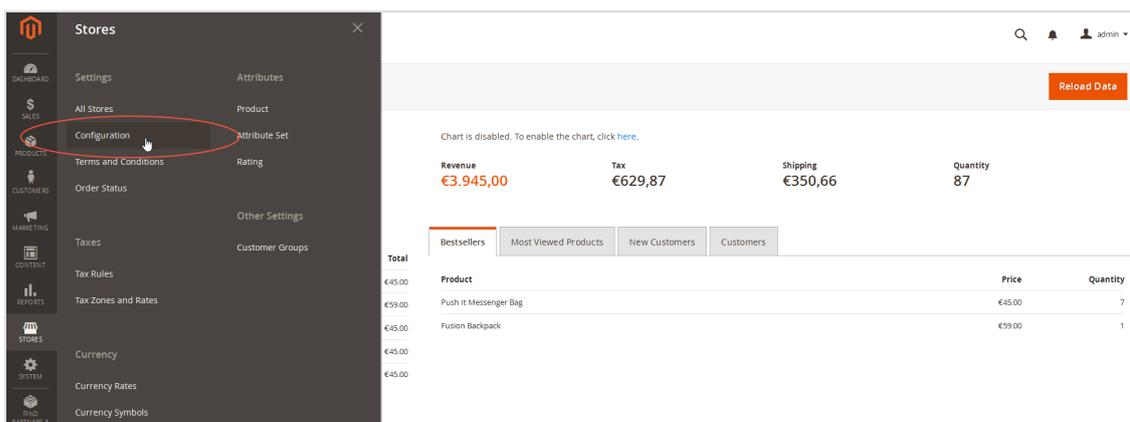
3. Select **Optivo** > **optivo broadmail**.
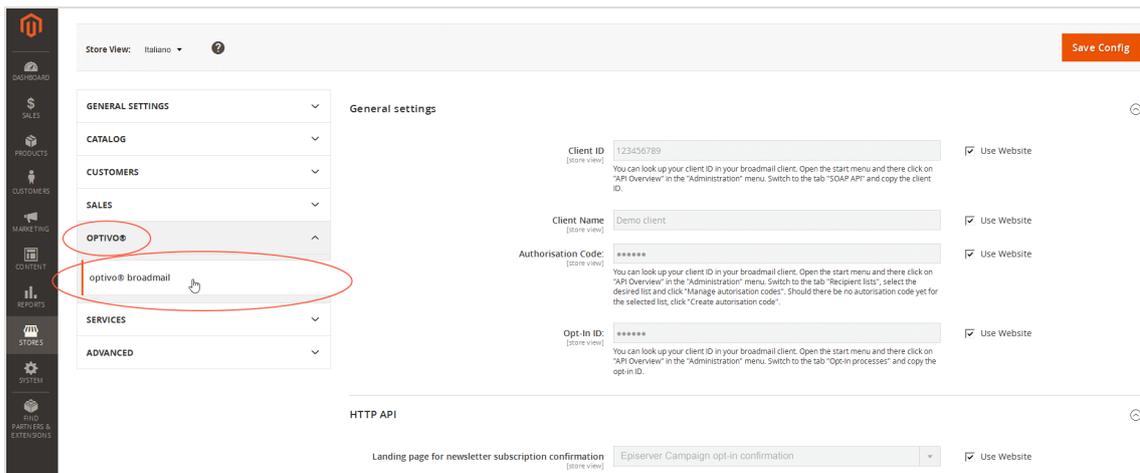
4. In **General Settings**, enter the following data:
   - **Client ID**. Enter the client ID.
   - **Client Name**. Enter a name for the client. You can choose any name for the client. However, use the same name as in Episerver Campaign.
   - **Authorisation Code**. Enter the authorization code.
   - **Opt-In ID**. Enter the opt-in ID.
   - **Debug Mode**. Select Yes.

5. In the **HTTP API** area, from the **Landing page for newsletter subscription confirmation** drop-down list, select the landing page that you created for the newsletter registration in Magento 2.

6. In the **HTTP API** area, from the **Landing page for newsletter unsubscribe confirmation** drop-down list, select the landing page that you created for the newsletter unsubscription in Magento 2.
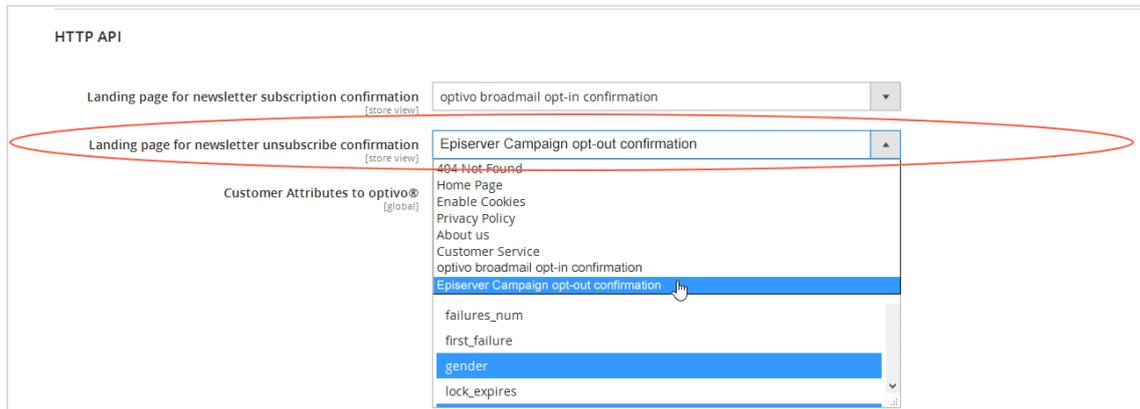
7. Save your changes.

Transferred attributes in the standard configuration

The Magento 2 integration only transfers the email addresses of customers who subscribe to the newsletter with their email address, but are not logged into their customer account. The data listed in the following table is transferred for customers who are logged into the customer account.

If a customer or an administrator changes the customer data in the **shop system**, the changes are automatically transferred to the Episerver Campaign recipient list. Changes to customer data entered in a recipient list in Episerver Campaign are ***not*** synchronized with your shop system by Magento 2 integration. For this reason, change customer data in your Magento 2 system to keep the information synchronized.

- **Email**. Email address of the customer/recipient
- **Salutation**. Title
- **Firstname**. First name
- **Lastname**. Last name
- **Language**. Language of the shop set up in Magento 2 in which the customer has registered
- **Street**. Street
- **Zip**. Postal code
- **City**. City
- **State**. State
- **Country**. Country
- **bmecssid**. ID generated by Magento 2 integration and used for identification during communication with Episerver Campaign
- **bmecsscc**. ID generated by Magento 2 integration and used for identification during communication with Episerver Campaign
- **store_id**. ID of the web shop in which the customer has registered

- **dob**. Date of birth
- **group_id**. Customer group

Expanding the recipient list structure and transferring additional recipient data

You can transfer other recipient/customer data from Magento 2 to Episerver Campaign, in addition to the standard attributes. To set up the transfer, you need to:

- **Request** additional recipient list fields.
- **Enable** the additional recipient data in Magento 2.

> **Note:** The additional attribute fields in Magento 2 must be programmed in accordance with the specifications of Magento 2. Additional attribute fields that have not been programmed according to the Magento 2 specifications cannot be transferred to Episerver Campaign.

Requesting additional recipient list fields

To request additional recipient list fields, contact **customer support** and let Episerver know which additional recipient list fields you require for user-defined attributes. **Customer support** will expand your list of recipients with the additional recipient list fields as per your requirements.

Enabling the transfer of additional recipient data

After customer support adds the requested recipient list fields, activate the transfer of the corresponding recipient data via HTTP API in Magento 2.

1. Log in to Magento 2 with administrator rights.
2. Select **Stores** > **Configuration**.
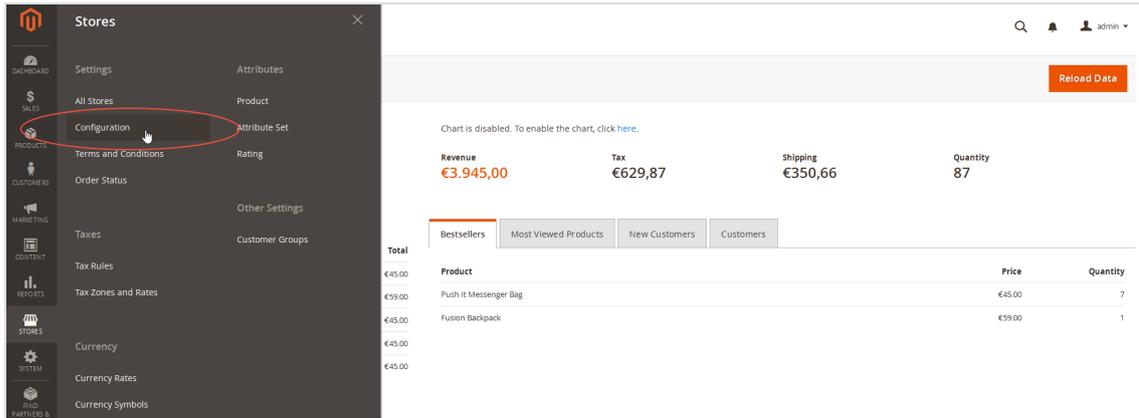
3. Select **Optivo** > **optivo broadmail**.
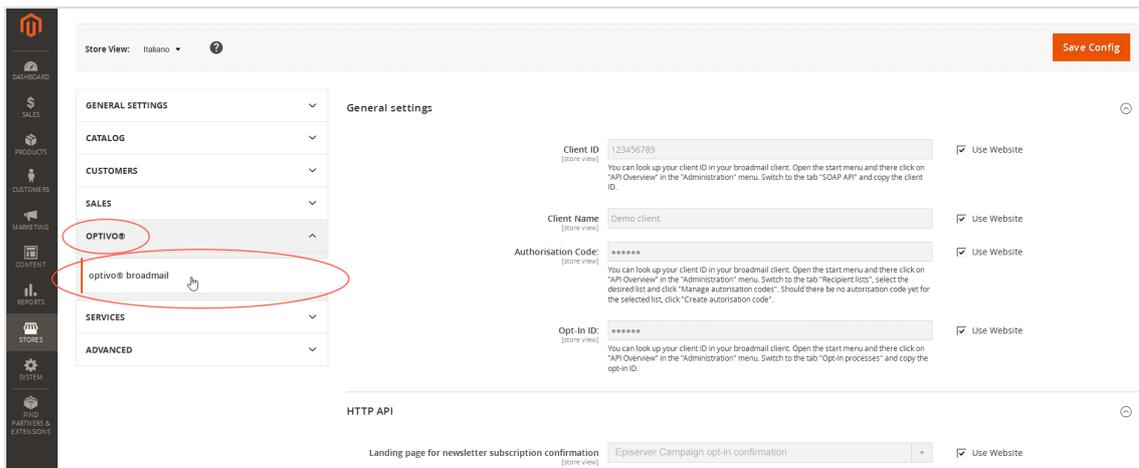
4. In the **HTTP API** area, in the **Customer Attributes to optivo** list, select the additional recipient data that you want to transfer to Episerver Campaign in addition to the standard attributes.

> **Tip:** Hold down **Shift** to select multiple attributes at the same time.

5. Save your changes.

Configuring transactional mails via HTTP API

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to configure sending of transactional mails via HTTP API with Magento 2. For transactional mails via the SMTP API, see [Transactional mails via SMTP API.](#)

How it works

Sending of transactional mails via HTTP API uses these templates:

- A *Sender* template in Magento 2, which sends the variables of the transaction (for example customer name, ordered products) via the HTTP API.
- A *Recipient* template in Episerver Campaign, which uses field functions to insert sent variables into relevant locations. This creates the finished transactional mail with layout.

Sending and receiving the content of the variables takes place using the transaction recipient list as a *buffer*.

1. The Magento 2 template sends the variables.
2. The variables are written to the transaction recipient list: each variable into the relevant recipient list field.
3. Using field functions, Episerver Campaign copies the template with the individual variables from the transaction recipient list and places it in the desired location in the transactional mail.

Configuration steps

1. Set up a transaction recipient list.
2. Create the template in Episerver Campaign.
3. Create and activate the template in Magento 2.
4. Configure transactional mails and transfer Magento 2 variables.

Step 1. Setting up a transaction recipient list

Contact customer support to set up the transaction recipient list. Plan in advance which variables you want to transfer from Magento 2 into Episerver Campaign for your transactional mails.

List the Magento 2 variables for which you require a corresponding recipient list field in your transaction recipient list. Also, let Episerver know the naming of the recipient list fields.

> Note: The scope of the transaction recipient list is limited. For this reason, you should request generic names for the recipient list fields, for example custom_string_1, custom_string_2, custom_date_1 and so on.

Step 2. Creating a template in Episerver Campaign

Create the template and add the desired transactional mail texts (the unchangeable, static texts that are to be sent to recipients) and insert **field functions** in the places where the content of the Magento 2 variables should be.

Field functions

Field functions are placeholders that refer to a specific recipient list field in your transaction recipient list. The variables and content of the variables sent from Magento 2 are written into the relevant recipient list fields in your transaction recipient list. The field functions you place load relevant content from the referenced recipient list field in the next step.

Example

Set up a transactional mail text that greets each customer using the last name and the order date. For this you need these variables: **salutation**, **lastname** and **orderdate**.

The content of the variables is first written to a relevant recipient list field of the transaction recipient list (from Magento 2 via the HTTP API). To access these recipient list fields, insert the individual field functions into the Episerver Campaign template and place the name of the recipient list field in curly brackets. To import the variable contents, the static text and field functions in the Campaign template could look like this:

```
Hello, {salutation} {lastname}!
Thank you for your online order from {orderdate}.
```

The example will appear in the sent transactional mail as follows:

Hello, Mr. Miller!
Thank you for your online order from August 3.

Adding static texts and field functions to a template

1. Log in to Episerver Campaign.
2. Open the start menu and select **Campaigns** > **Transactional mails**.
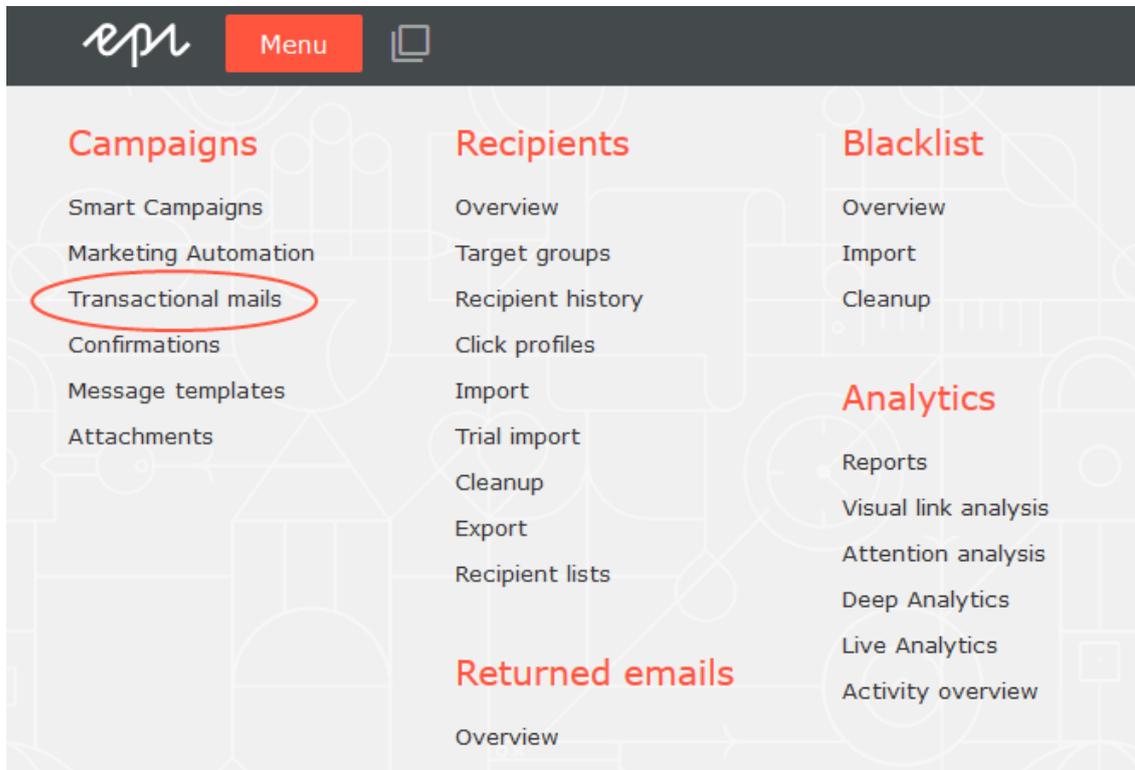
3. Click **Create**.
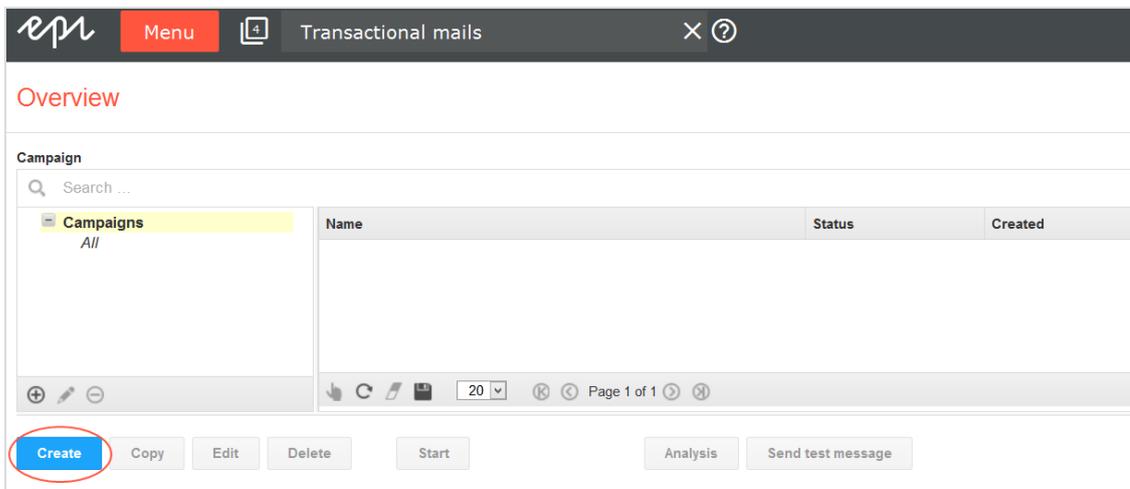
4. From the left action pane, drag the **Recipients** node into the workspace.

5. In the **Recipient lists** drop-down list in the context menu, select your transaction recipient list.
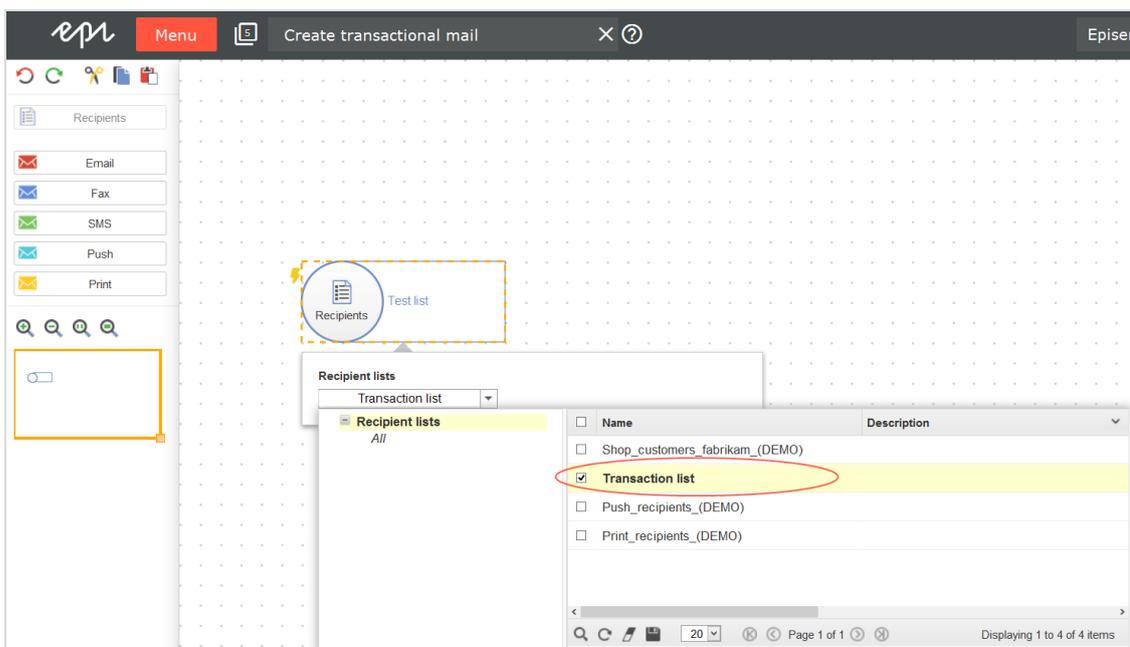
> **Warning:** [Customer support](#) has set up a separate transaction recipient list for you. Make sure you use this transaction recipient list, instead of a regular recipient list.

6. From the left sidebar, drag the message node for the desired media type (email, SMS) into the workspace.

7. In the **Name** box in the context menu, enter a name for your transactional mail (for example *Order con-firmation*).
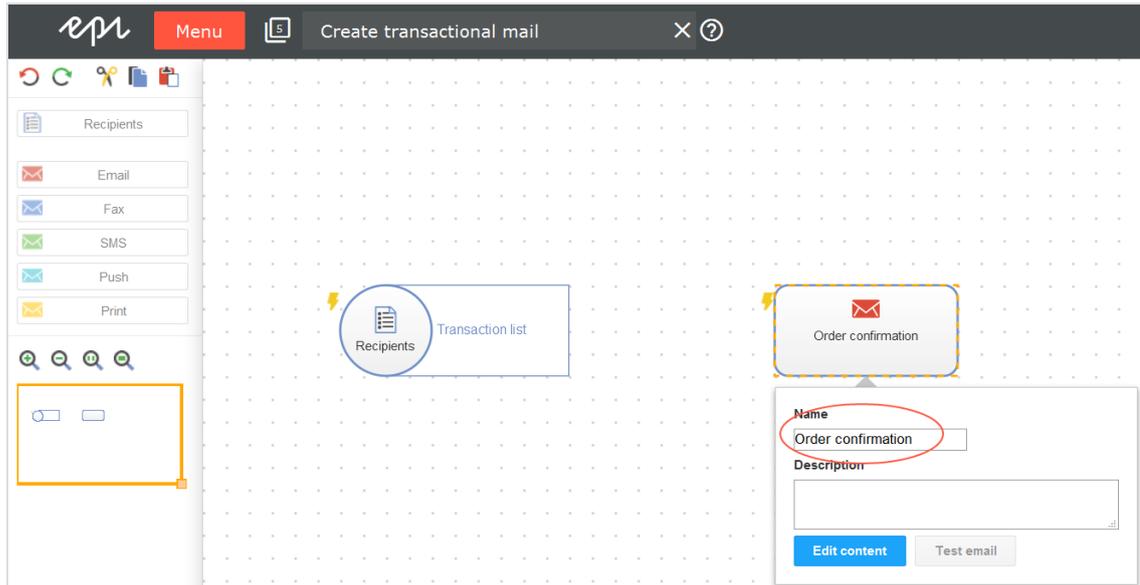
8. In the context menu for the messages node, click **Edit content**.
9. In the **Template** list, select the desired template and confirm your selection by clicking **Next**.
10. Configure the template for the transactional mail according to your requirements. Enter a subject and insert the static texts that recipients will receive, into the content paragraphs. Insert the relevant field function for the recipient list field of the transaction recipient list into places where variables from the Magento 2 template should appear (see [example](#) above).
11. Click **Apply**.
12. Click **Close**.

13. Connect the **Recipients** node with the message node.
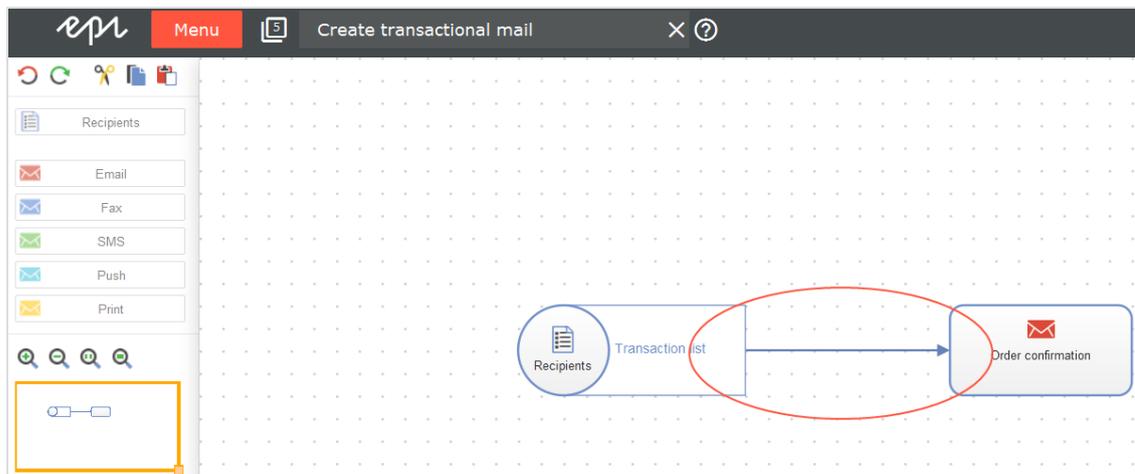
14. Click **Save and close**.

15. Select the mailing in the overview and click **Start** to activate your transactional mail and to start the sending process.

Step 3. Creating and activating the template in Magento 2

Create a template in Magento 2 that sends the variables to Episerver Campaign via HTTP API.

Prerequisites

- **Authorization code**. For your transaction recipient list in to Episerver Campaign.

  Open the start menu and select **Administration** > **API overview** > **Recipient lists** tab and select the desired transaction recipient list. Click **Manage authorization codes** and copy the authorization code from the list. If no authorization code is available for the selected recipient list, click **Create authorization code**.

- **Mailing ID**. For the template in Episerver Campaign.

  Open the start menu and select **Campaigns** > **Transactional emails**. Copy the relevant mailing ID of the template in the list in column **ID**.

Configuration options

With Magento 2, you have two template configuration options for transferring variables:

1. Use a template included in the standard Magento 2 installation and customize it to fit your needs. If you choose this option, the template's HTML code loads in the template content field. The code contains the available variables, for example `{{trans "%name," name=$customer.name}}` (for addressing customers by their names). Clean up the template around the HTML code and reduce the template to the variables. In the next step, map the corresponding recipient list fields of your transaction recipient list in Episerver Campaign. See Mapping: Here's how you do it.

2. Create an empty template and manually insert the variables to be sent to Episerver Campaign via the HTTP API.

Do the following to create a template, add the variables and map these to the recipient list fields of your transaction recipient list.

1. Log in to Magento 2 with administrator rights.
2. Select **Marketing** > **Email Templates**.
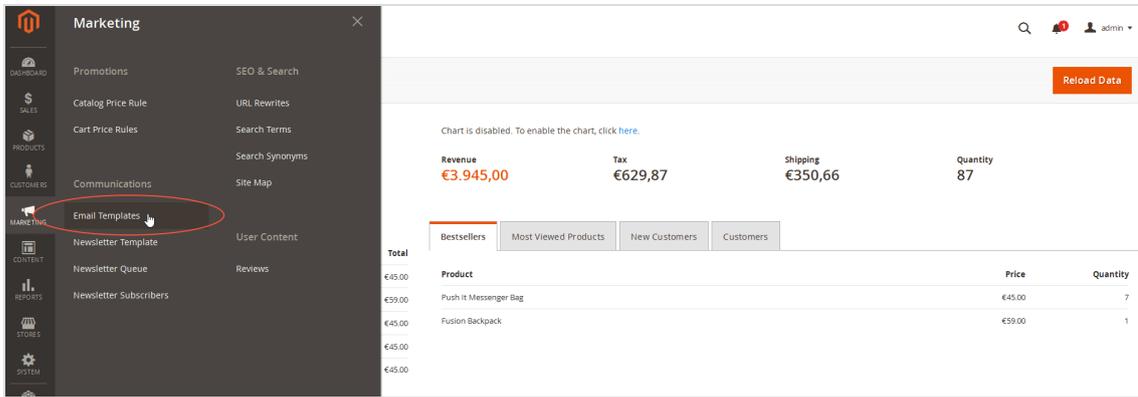
> **Note:** If you already created templates that are sent to Episerver Campaign, these appear as the template type **optivo**.
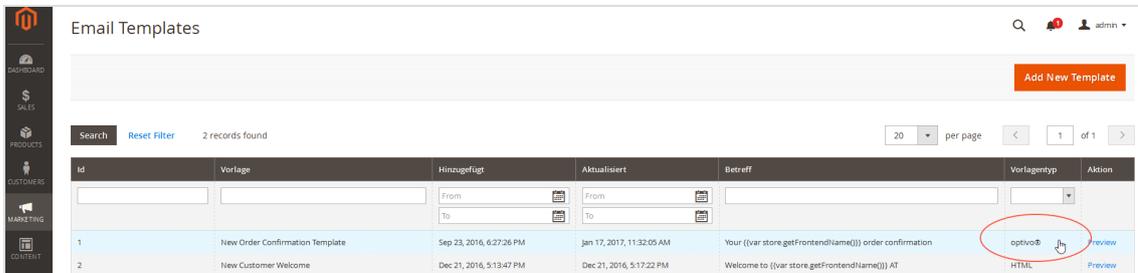
3. Click **Add New Template**.
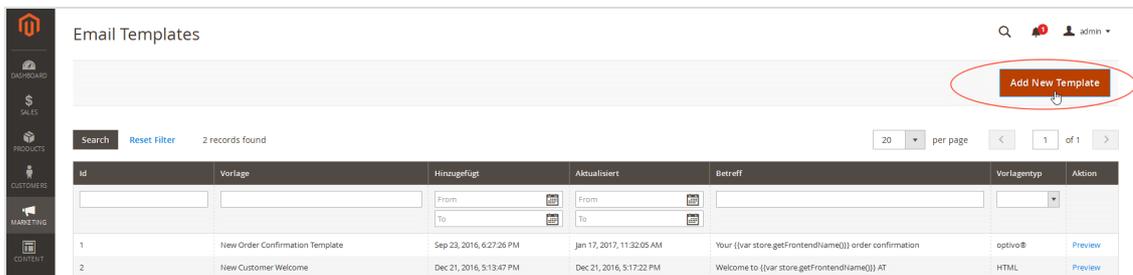
4. In the **Template Information** area, fill in the fields:

- **Template Name**. Enter a name for the new template.
- **Template Subject**. Leave empty.

> **Note:** The subject is automatically entered later using the subject from the template created in Episerver Campaign.

- **optivo broadmail**. Select **Enabled**.
- **optivo authcode**. Enter the authorization code for the transaction recipient list in Episerver Campaign.
- **optivo bmmailid**. Enter the mailing ID of the template in Episerver Campaign.

5. In the **Template Content** box, enter which variables from Magento 2 should be transferred to which recipient list field of the transaction recipient list in Episerver Campaign. To add a variable, click **Insert Variable…**
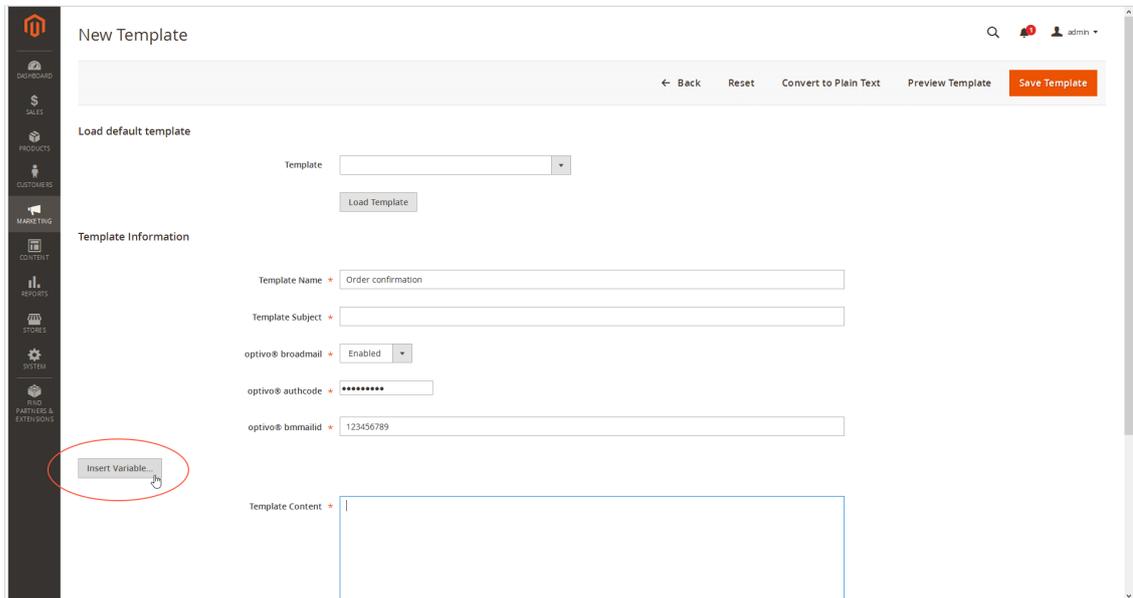
6. Select the desired variable by clicking it.

7. Map the inserted variable with the corresponding recipient list field in Episerver Campaign. If required, click **Insert Variable…** to add further variables.
How to do the mapping

Magento 2 integration from Episerver Campaign uses the following structure for mapping:

```
Name of the recipient list=name of the Magento 2 variables
```

Enter the mapping assignment for each variable line by line, and separate the individual variables/mapping instructions with a line break.

Example:

```
lastname={{config path="trans_email/ident_custom1/name"}}
url={{config path="web/secure/base_url"}}
```

Map with both example lines and transfer:

- Value of the Magento 2 variables `{{config path="trans_email/ident_custom1/name"}}` into the transaction recipient list field **lastname**
- Value of the Magento 2 variables `{{config path="web/secure/base_url"}}` into the transaction recipient list field **url**
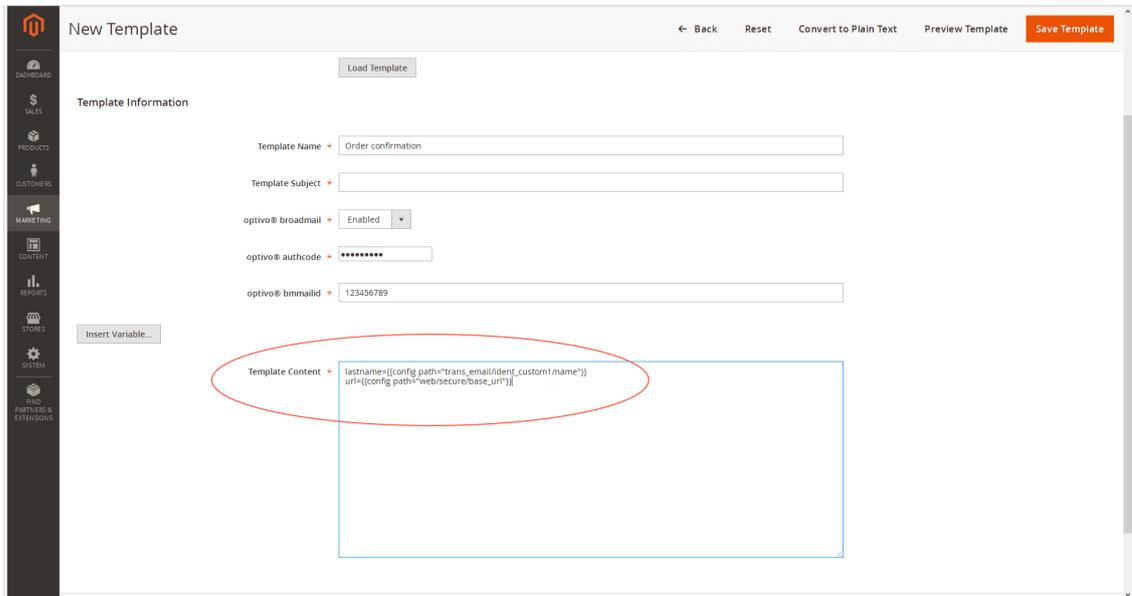
8. Click **Save Template**.

9. After you create the template, activate it and map an event (for example an order process, or newsletter registration). At which point in the admin interface you map and activate the template to an event depends on the type of the event.

   Example: To map and activate the template to the event type **Order**, do the following:

   a. Select **Stores** > **Configuration**.

   b. Select **Sales** > **Sales Emails**.

   c. Activate the template by selecting it in the **Order** area in the **New Order Confirmation Template** drop-down list.

   d. Save your changes.

Step 4. Configuring transactional mails and transferring Magento 2 variables

To transfer customer orders and billing and delivery addresses to the template in Episerver Campaign, using the template in Magento 2, you need additional configuration, and create a special field function (for order access) in your Episerver Campaign client.

> **Note:** Magento 2 provides the customer orders and billing and delivery addresses as HTML code. This needs to be changed to simple text so that Episerver Campaign can process the information.

Converting HTML code to simple text

The following functions in the Magento 2 integration are for converting the HTML code into simple text:

getEpiserverBillingData( )

With `getEpiserverBillingData( ),` you get access to the individual parameters of the billing address. This feature is available via the following instruction, used in an example for the salutation of the customer:

```
{{var order.getEpiserverBillingData('salutation')}}
```

You transfer the return value of the function call (parameter **salutation**) into the recipient list field **salutation** as simple text with the following mapping:

```
salutation={{var order.getEpiserverBillingData('salutation')}}
```

getEpiserverBillingData() parameters

No.	Parameter	Description
1	salutation	Title
2	firstname	First name
3	middlename	Middle name
4	lastname	Last name
5	company	Company
6	email	Email address
7	telephone	Telephone number
8	suffix	Extension
9	fax	Fax number
10	street	Street

No.	Parameter	Description
11	postcode	Postal code
12	city	City
13	region	Region/state
14	country	Country

getEpiserverShippingData()

With `getEpiserverShippingData( )`, you receive access to the individual parameters of the customer's delivery address. The feature is available via the following mapping, in this example for the customer's last name:

```
{{var order.getEpiserverShippingData('lastname')}}
```

You transfer the return value of the function call (parameter **lastname**) into the recipient list field **lastname** as simple text with the following mapping:

```
lastname={{var order.getEpiserverShippingData('lastname')}}
```

getEpiserverShippingData() parameters

No.	Parameter	Description
1	salutation	Title
2	firstname	First name
3	middlename	Middle name
4	lastname	Last name
5	company	Company
6	email	Email address

No.	Parameter	Description
7	telephone	Telephone number
8	suffix	Extension
9	fax	Fax number
10	street	Street
11	postcode	Postal code
12	city	City
13	region	Region/state
14	country	Country

getEpiserverOrderData()

With `getEpiserverOrderData( ),` you access the customer's orders.

> **Note:** Accessing orders differs from accessing the billing and the delivery addresses, as you transfer a list with several parameters into a single recipient list field, instead of transferring individual parameters.

The function is available via the following instruction (in this example, product ID, storage unit, product name, quantity ordered and price):

```
{{var order.getEpiserverOrderData('product_id','sku','name','qty_ordered',
'price')}}
```

You transfer a string with the order information specified in the **order_positions_csv** into the recipient list field with the following mapping:

```
order_positions_csv={{var order.getEpiserverOrderData('product_id',
'sku','name','qty_ordered','price')}}
```

getEpiserverOrderData( ) parameters

No.	Parameter
1	increment_id
2	state
3	status
4	coupon_code
5	shipping_description
6	is_virtual
7	store_id
8	base_discount_amount
9	base_discount_canceled
10	base_discount_invoiced
11	base_discount_refunded
12	base_grand_total
13	base_shipping_amount
14	base_shipping_canceled
15	base_shipping_invoiced
16	base_shipping_refunded
17	base_shipping_tax_amount

No.	Parameter
18	base_shipping_tax_refunded
19	base_subtotal
20	base_subtotal_canceled
21	base_subtotal_invoiced
22	base_subtotal_refunded
23	base_tax_amount
24	base_tax_canceled
25	base_tax_invoiced
26	base_tax_refunded
27	base_to_global_rate
28	base_to_order_rate
29	base_total_canceled
30	base_total_invoiced
31	base_total_invoiced_cost
32	base_total_offline_refunded
33	base_total_online_refunded
34	base_total_paid

No.	Parameter
35	base_total_qty_ordered
36	base_total_refunded
37	discount_amount
38	discount_canceled
39	discount_invoiced
40	discount_refunded
41	grand_total
42	shipping_amount
43	shipping_canceled
44	shipping_invoiced
45	shipping_refunded
46	shipping_tax_amount
47	shipping_tax_refunded
48	store_to_base_rate
49	store_to_order_rate
50	subtotal
51	subtotal_canceled

No.	Parameter
52	subtotal_invoiced
53	subtotal_refunded
54	tax_amount
55	tax_canceled
56	tax_invoiced
57	tax_refunded
58	total_canceled
59	total_invoiced
60	total_offline_refunded
61	total_online_refunded
62	total_paid
63	total_qty_ordered
64	total_refunded
65	base_shipping_discount_amount
66	base_subtotal_incl_tax
67	base_total_due
68	shipping_discount_amount

No.	Parameter
69	subtotal_incl_tax
70	total_due
71	base_currency_code
72	discount_description
73	global_currency_code
74	order_currency_code
75	shipping_method
76	store_currency_code
77	store_name
78	customer_note
79	created_at
80	updated_at
81	total_item_count
82	shipping_incl_tax
83	base_shipping_incl_tax
84	coupon_rule_name

After the transfer to Episerver Campaign, the individual parameters in the recipient list field of your transaction recipient list are separated by a *semicolon*. If multiple products are transferred, the individual products are

separated by a *line break*. The string written in the recipient list field corresponds to the structure of a table that is saved in the *CSV format*.

Creating a special field function for order data

If you want to use *order data* in a transactional mail, you must create a new **special field** function in your client. This must use the template engine of Episerver Campaign to transfer the string to HTML, as described in the following.

1. Log in to Episerver Campaign.
2. Open the start menu and select **Administration** > **Field functions**.
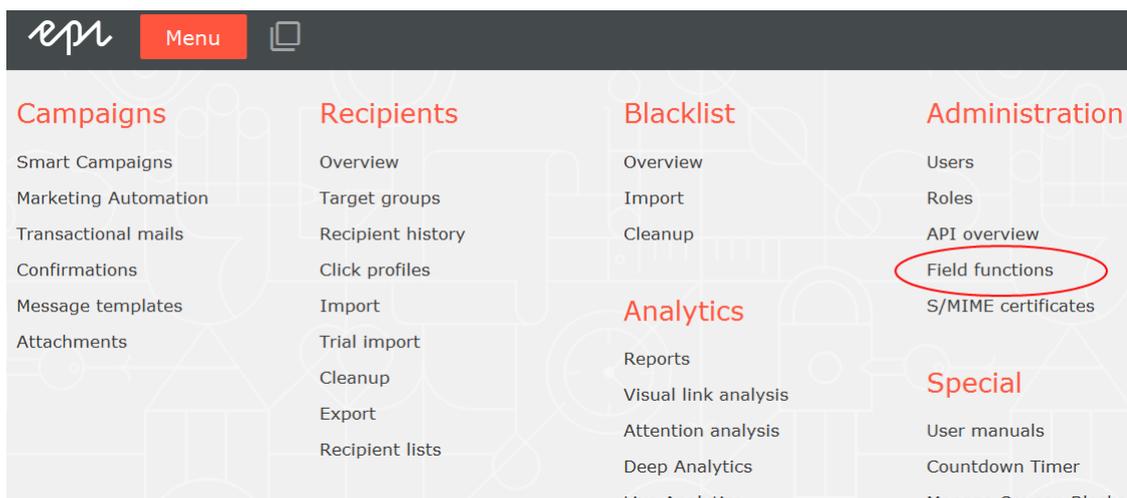
> **Note:** If the **Field functions** menu item is not available in your client, contact [customer support](#).

3. Click **Add**.
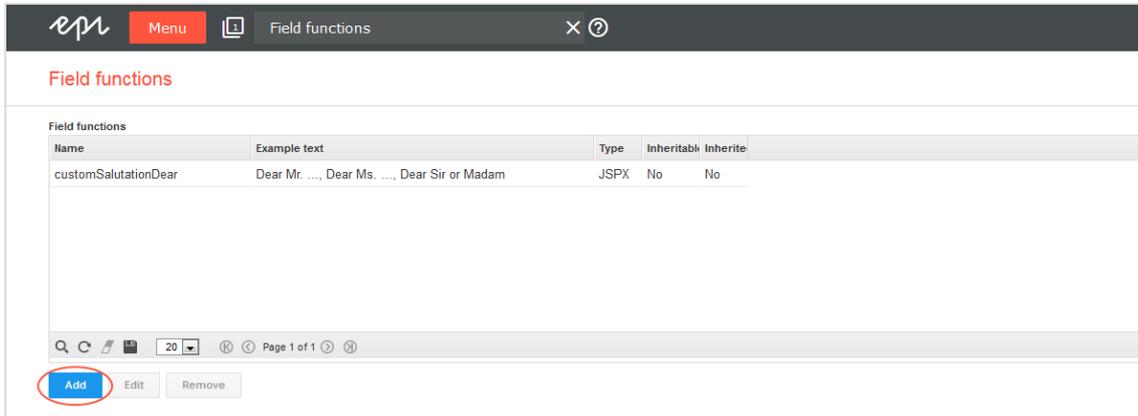
4. Under **General**, in the **Name** box, add a concise name for the new field function, for example **CSVOrder-Objects**.
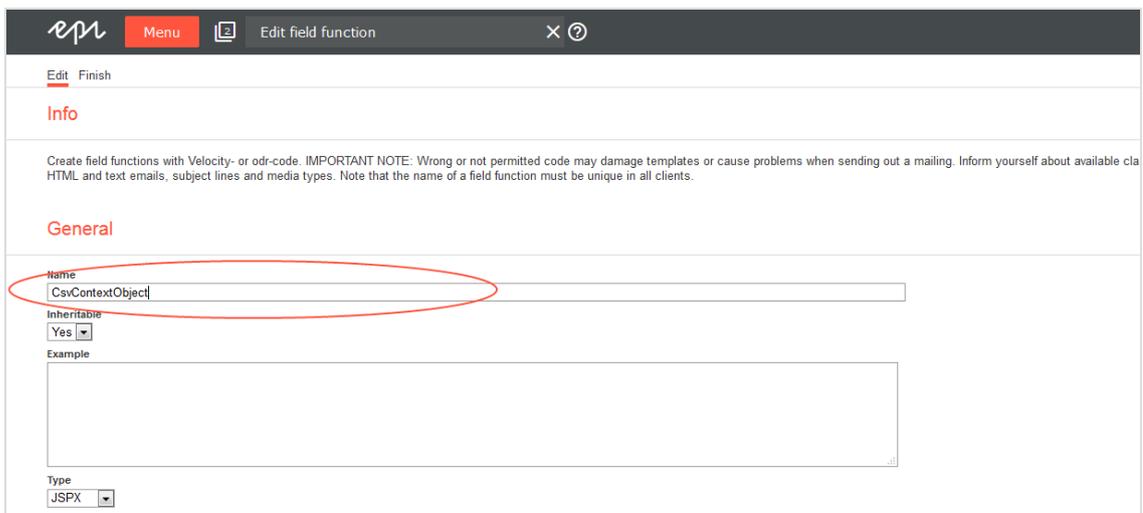
5. In the **Type** drop-down list, select **Velocity**.

6. In the **Content** area > **Default replacement** tab > **Default replacement** box, enter the following code:

```
<table>
<tr>
  <td>Product ID</td><td>SKU</td><td>Name</td><td>Quantity</td>
  <td>Price</td>
</tr>
#set ("csvContent = "csv.readFromString("user.data.order_positions_csv))
#foreach("row in "csvContent)
<tr>
#foreach("item in "row)
  <td> "item </td>
#end
</tr>
#end
</table>
```

7. Click **Save**.

   Insert the field function at the desired location in the Episerver Campaign template. When the transactional mail is sent and the recipient list field **order_positions_csv** contains a CSV context object, a simple HTML table is displayed in the sent transactional mail.

   > **Note:** See Field functions how to customize the layout of the table as desired (HTML knowledge is required).

Configuring transactional mails via SMTP API

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to configure sending of transactional mails via SMTP API with Magento 2. For transactional mails via the HTTP API, see Transactional mails via HTTP API.

Prerequisites

You need an **SMTP API user account** for the SMTP connection between Episerver Campaign and your shop. Contact customer support to set this up. You will receive a user name and password for the SMTP API.

1. Log in to Magento 2 with administrator rights.
2. Select **Stores** > **Configuration**.

3. Select **Optivo** > optivo **broadmail**.
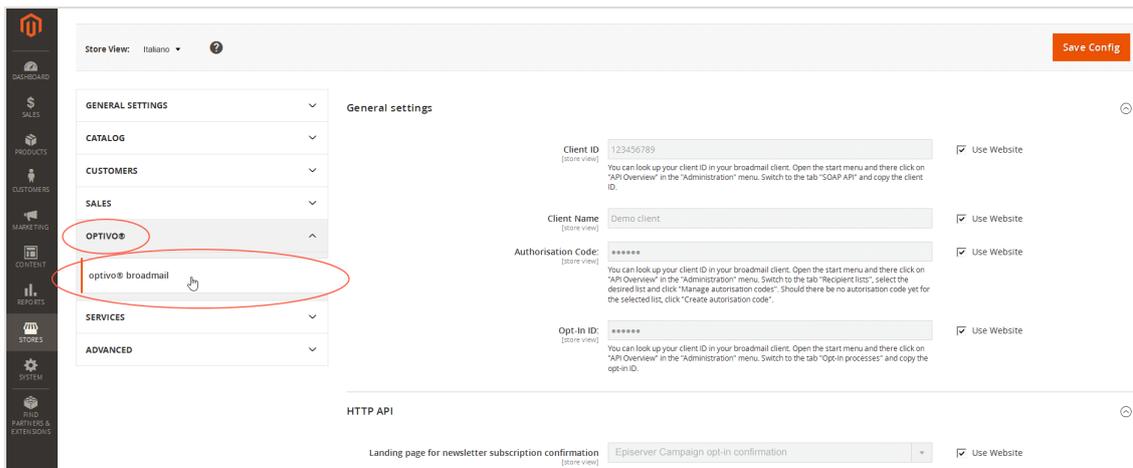
4. In the **SMTP API** area:
   - **Use optivo broadmail SMTP API**. Select **Yes**.
   - **Username**. Enter your SMTP API user name.
   - **Password**. Enter your SMTP API password.

SMTP API		
Use optivo® broadmail SMTP-API [website]	Yes ▼	
	System -> Configuration -> Advanced -> System -> Disable email communications must be set to 'No'.	
Username [website]		
Password [website]		

5. Save your changes.

Configuring the catalog export

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to configure the catalog export, when using Magento 2 as e-commerce platform with Episerver Campaign. You can for example transfer promotional texts and product images, and use this data in your newsletters. See Content interface paragraph.

The Magento 2 integration exports your catalog into a CSV file (comma-separated values), and automatically transfers the catalog to the Episerver server via a secure SFTP connection at specific time intervals.

Prerequisites

You need an SSH key pair and an SFTP user account to set up a secure connection.

Creating an SSH key pair

Follow these instructions to create a key pair:

- FTP access via SCP for Windows
- FTP access via SCP for MacOS/OS X

Requesting an SFTP user account

When you have created the key pair, do the following to request a user account:

1. Contact customer support, providing the name of the CSV file with your product catalog.
2. Email your public key (the file with the .pub extension) to customer support.

3. Send your key fingerprint in a *separate* email to <u>customer support</u>.

> **Note:** For security reasons, always send your public key and key fingerprint in two separate emails.

When your account is configured, you receive your user account information by email.

Activating the catalog export in Magento 2

In the following steps, you activate the catalog export and save your private SSH key.

1. Log in to Magento 2 with administrator rights.
2. Go to **Stores** > **Configuration** in the menu bar on the left.

3. In the left pane, select **Optivo** > **Optivo broadmail**.
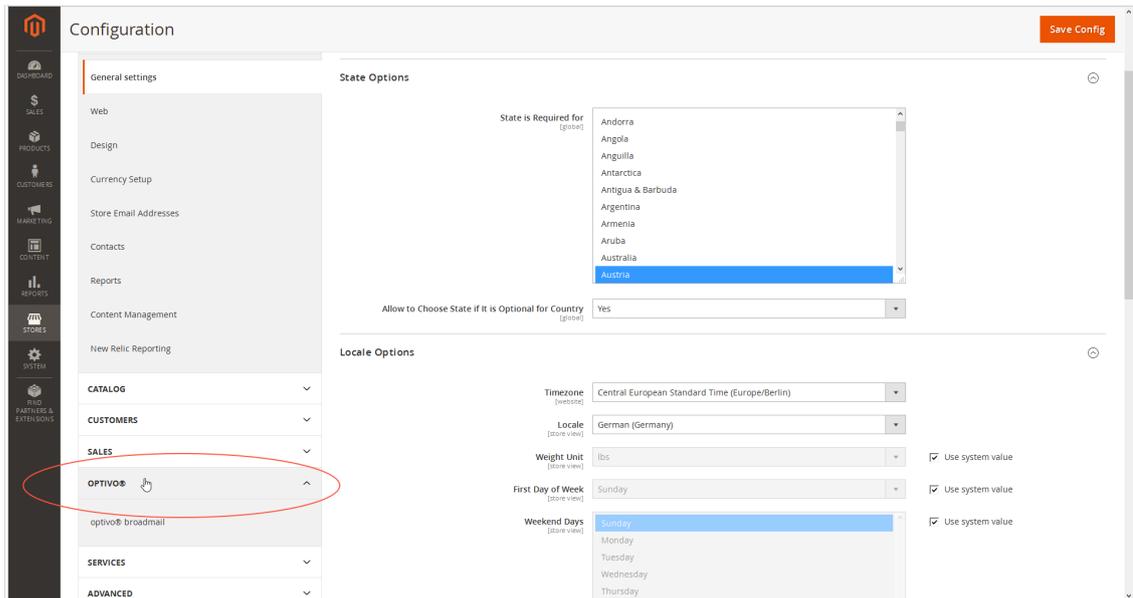
4. In the **FTP API (Product data export)** area, in the **Use optivo broadmail product data export** drop-down list, select **Yes**.
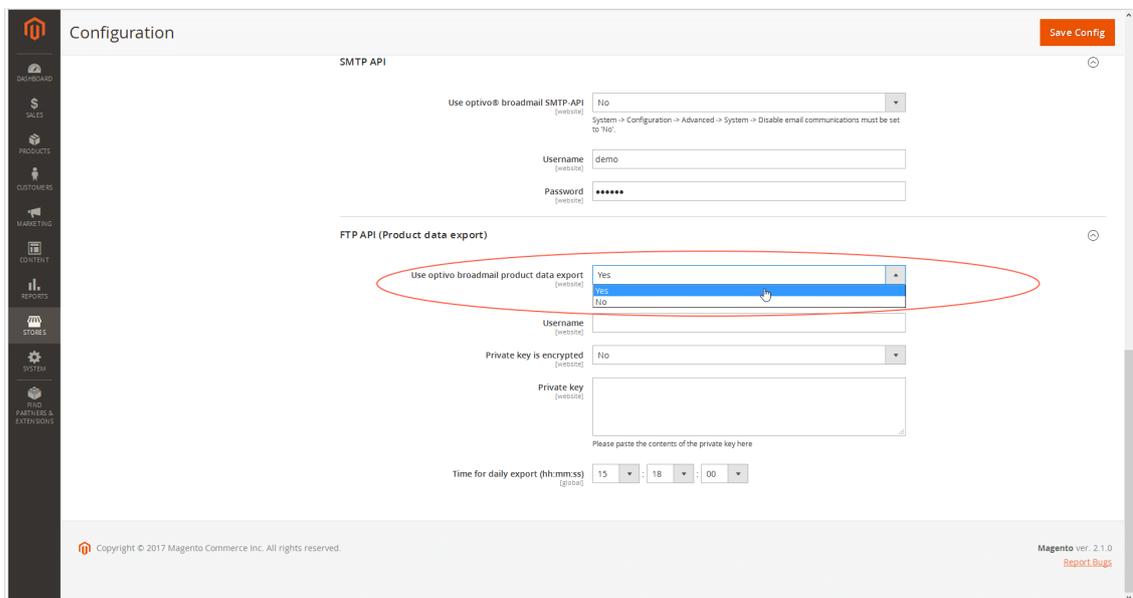
5. In the **Username** box, enter the user name of your SFTP user account.
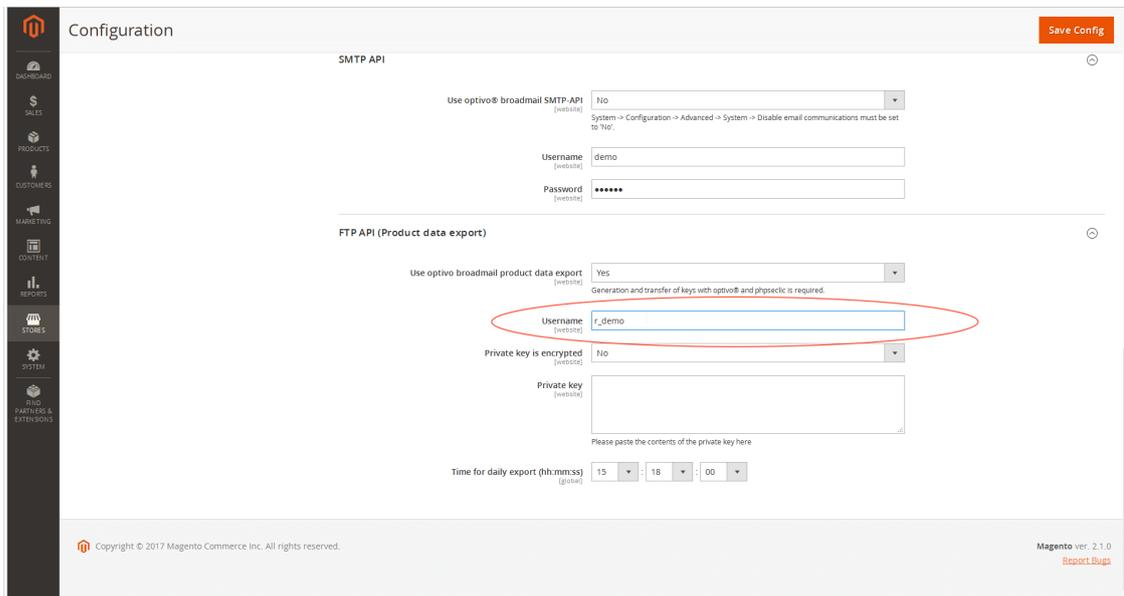
6. If you want to protect your SSH key with a password, select **Yes** in the **Private key is encrypted** drop-down list, and add a password in the **Password** box.

7. In the **Private key** box, enter your private key.

8. Under **Time for daily export (hh:mm:ss)**, select the time your product catalog should be exported.

9. Save your changes.

> **Note:** The product catalog export fails if the **Cron Jobs functionality** is incorrectly configured in Magento 2. This functionality is part of the standard installation. See
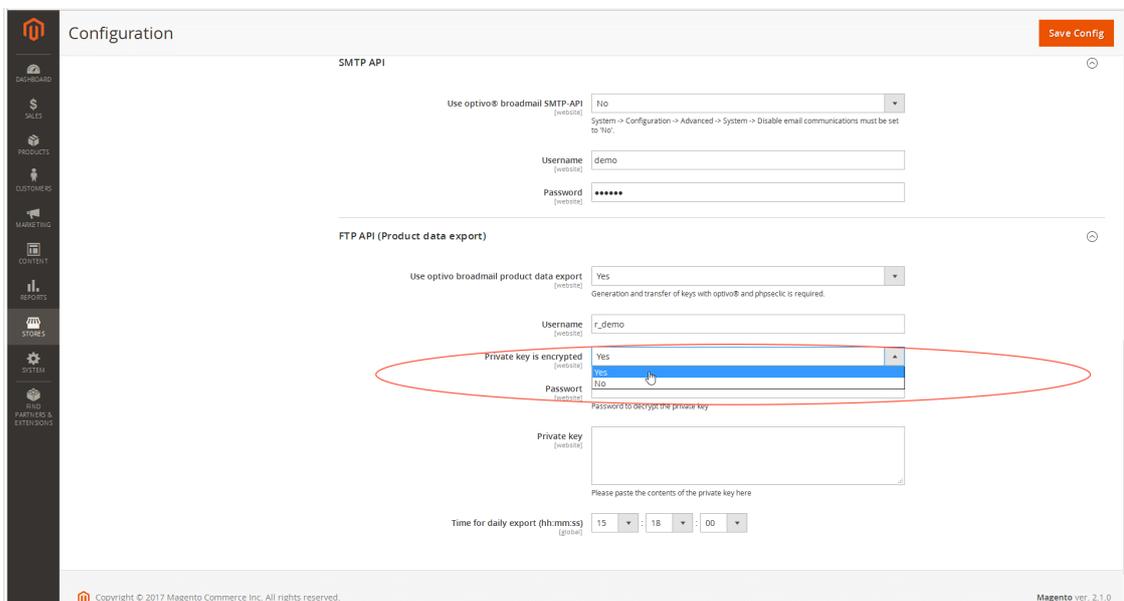
> the Magento 2 documentation for details.

Configuring shops and adapting messages

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to configure shops, connect templates and clients, and adapt front-end messages, when using Magento 2 as e-commerce platform with Episerver Campaign. You can set up a specific client in Episerver Campaign that is only used for sending transactional mails.

Configuring multiple shops individually

The settings for the "Default" shop will also apply to other shops set up in a Magento 2 installation. However, the Magento 2 integration lets you connect multiple shops and store views individually with different templates and different clients in Episerver Campaign. For example, this allows you to run multi-language shops and send order or newsletter subscription confirmations in the individual language of the recipient.

Do the following to configure this:

1. Log in to Magento 2 with administrator rights.
2. Go to **Stores** > **Configuration** via the menu bar on the left.

3. From the drop-down list under **Store View**, select the shop/store view you want to configure. Confirm your selection.
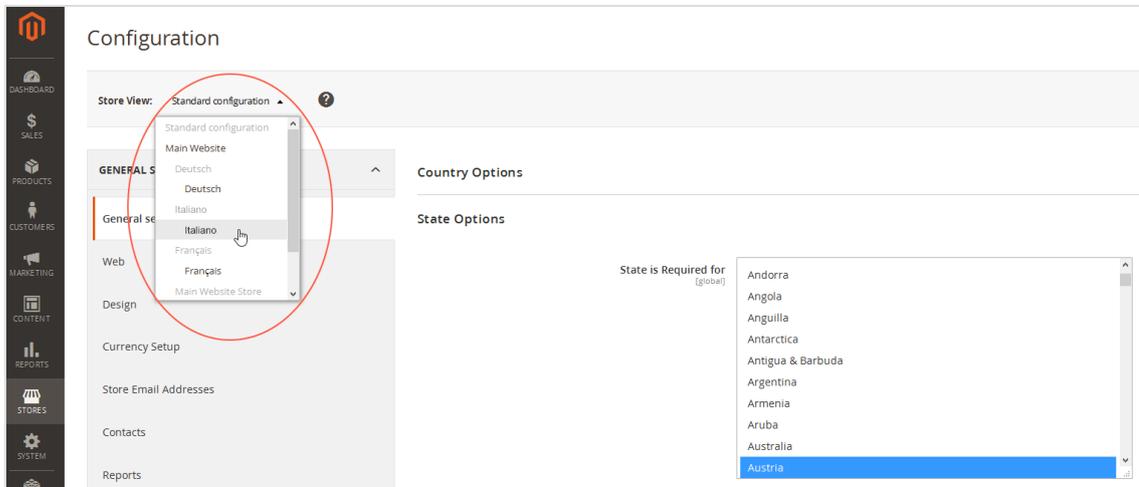
4. Click **OK**.

5. In the left pane, click **Optivo** > **optivo broadmail**.
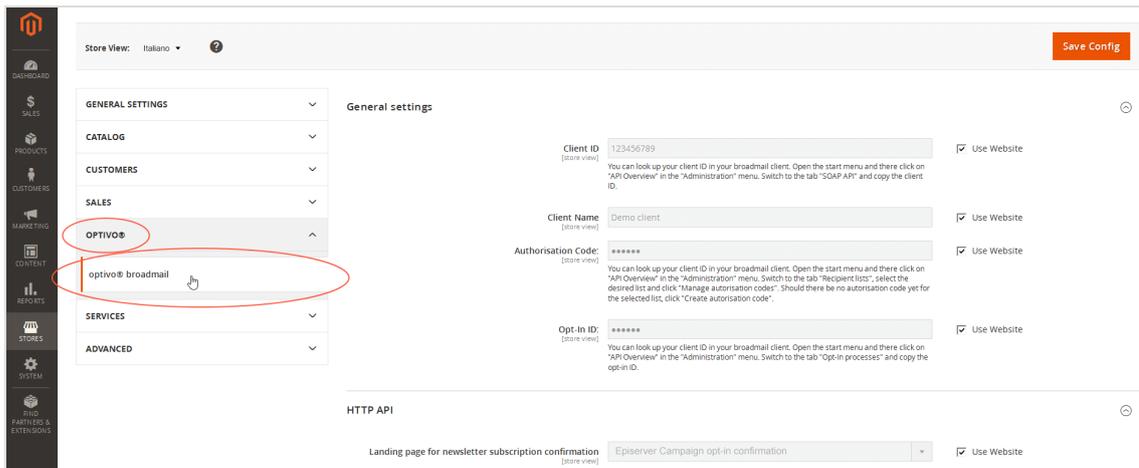
6. Clear the check boxes for the configurations that you want to change for the store. The grayed entry is activated and can be edited.
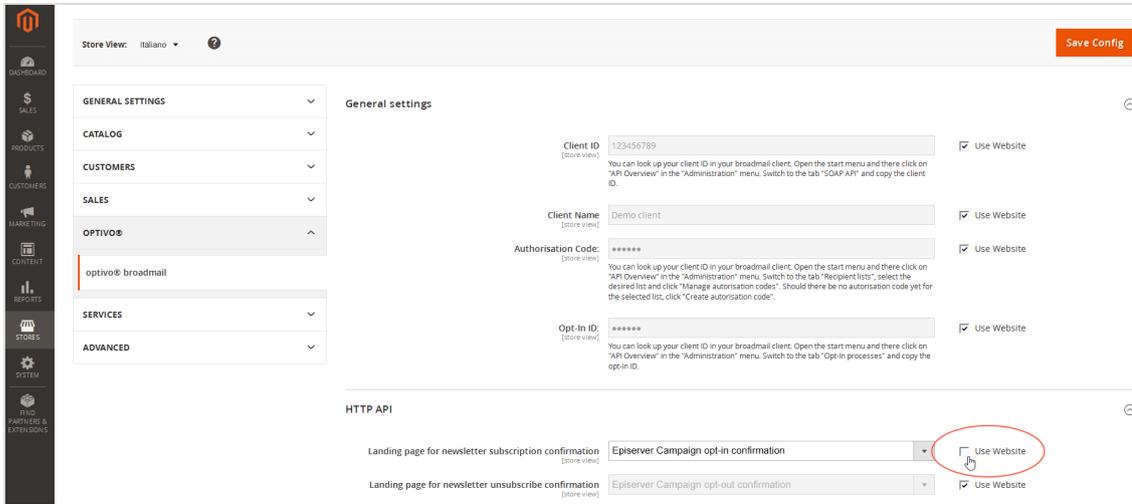
7. Change the configuration.
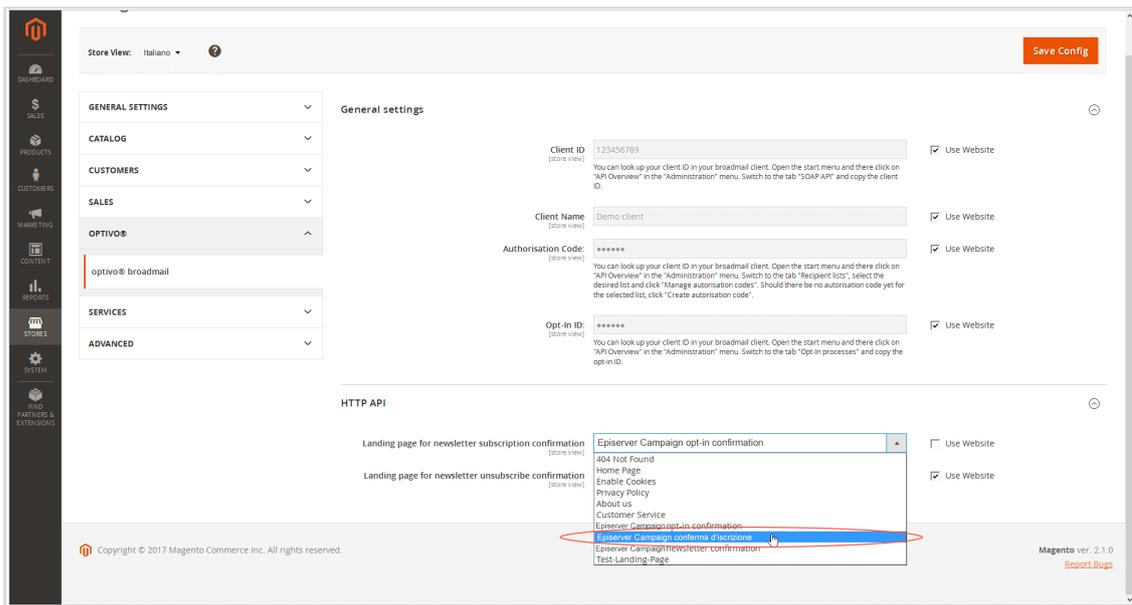
> **Note:** To send out newsletter registration confirmations or transactional mails in other languages, you must first create these in their respective language. See Configuring the newsletter and Transactional mails via HTTP API.

8. Save your changes.

Adapting front end messages

To translate or change front end messages displayed to website visitors, for example when logging in, you can edit the integration text files. Front end messages are located in the directory **src/i18n**. The files are simple text files that follow the Magento 2 standard.

> **Tip:** Install and test the Magento 2 integration on a test or staging system before you use it in production. If you are planning a test phase, report the URLs of the test system to customer support, to reference the subscribe and unsubscribe links during the test phase.

Troubleshooting

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to manage integrated-related issues when using Magento 2 as e-commerce platform with Episerver Campaign, how to get help with problems during installation and configuration, and how to activate error logging, and known issues.

Installation issues

If problems occur during the installation and configuration of Magento 2 integration, contact customer support and provide the following information:

- The version number of the Magento 2 system you are using.
- The output of the command `phpinfo()`.
- A description of when and in what context the error occurred.

> **Note:** Conflicts may occur with other expansion modules for Magento 2. If you cannot determine, limit, or resolve the conflicts, provide Episerver with a list of the modules you use.

Activating error logging

Error logging displays operating status of the integration and any errors that occurred.

1. Log in to Magento 2 with administrator rights.
2. Select **Stores** > **Configuration**.
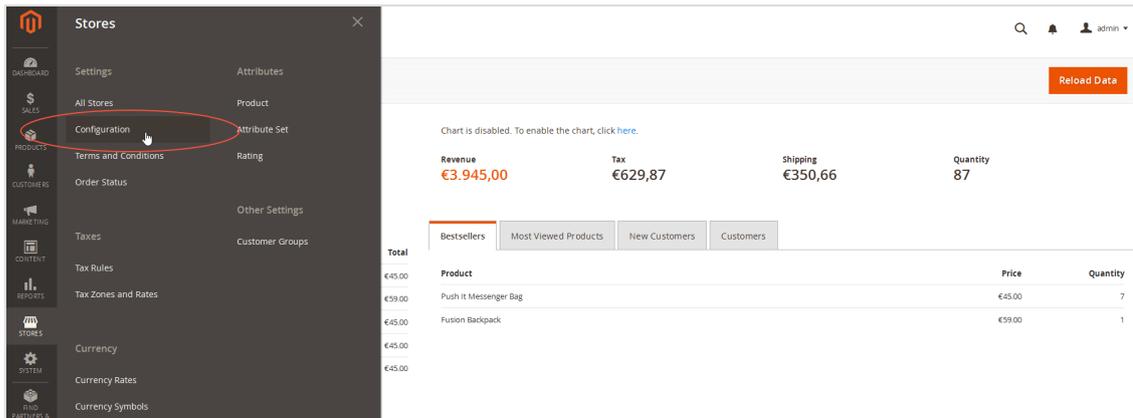
3. Select **Optivo** > **optivo broadmail**.
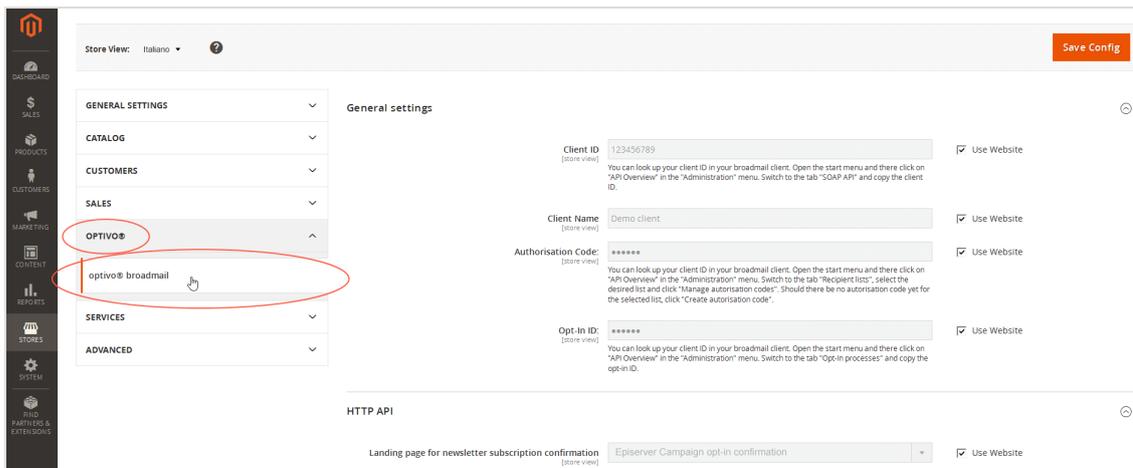
4. In the **General settings** area, in the **Debug Mode** drop-down list, select **Yes**.

5. Click **Save Config**.

The Magento 2 integration saves errors in the `var/log/optivo_broadmail.debug.log` file. If you cannot fix a problem yourself, send the lines that were recorded after the error occurred to customer support.

Entries in the error log have the following structure:

```
[2017-06-30 10:25:03] optivoLogger.DEBUG: processFallbackQueue:start [] []
[2017-06-30 10:25:03] optivoLogger.DEBUG: processFallbackQueue:maxRetries 10 [] []
[2017-06-30 10:25:03] optivoLogger.DEBUG: processFallbackQueue:process 1 entries [] []
 ...
[2017-06-30 10:25:03] optivoLogger.DEBUG: _checkResponse [] []
[2017-06-30 10:25:03] optivoLogger.DEBUG: a:7:{s:8:"response";s:207:"HTTP/1.0 404 Not Found
```

Known issues

The following errors in Magento 2 can affect the Episerver Campaign integration:

Problem	Possible cause	Solution
Version 2.1.0. In the back end (under **Customer Information** in the tab **Newsletter**), you cannot unsubscribe customers by clearing the **Subscribed to Newsletter** check box.	Documented Magento 2 error.	Unsubscribe customers via **Marketing** > **Newsletter Subscribers** by deleting the corresponding customer from the list.
Versions 2.0.7 and 2.1.0.	Currently	No solution currently

Problem	Possible cause	Solution
• At checkout, the customer cannot specify a new default address or change their address. • If customers have not stored an address in their customer account, they can create a new address at the checkout. This is, however, committed as a shipping address and not as a billing address – despite the existing option to use the same address for billing and shipping. Both errors affect the correct transfer of address information of the customer into transactional mails.	unknown.	available.
All versions. Magento displays the message *You have registered for the newsletter* on the confirmation page only after a delay.	Error in the Magento 2 system, not an error in the Magento 2 integration from Episerver Campaign.	No solution currently available.

Spryker integration

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

If you are using Spryker as an e-commerce platform, you can integrate Episerver Campaign to connect e-commerce and mailing activities.

With the Spryker integration, you can reliably manage your advertising consent: your customers can sign in to your newsletter directly in your Spryker shop and unsubscribe simply by clicking the unsubscribe link in the newsletter.

The Spryker integration provides the following features:

- Newsletter subscription and unsubscribes
- Transactional mails via HTTP API

Setting up Episerver Campaign

To set up the Spryker integration in your client, contact customer support.

Preparing recipient lists

Provide Episerver with the names of your Episerver clients. Customer support adapts the recipient lists to the Spryker integration.

> **Note:** A recommended client setup uses two separate clients: one for sending newsletters and the other for sending transactional mails. Episerver offers a standard template for the required recipient lists that is suitable for many applications and scenarios. Contact customer support to check if the standard template meets your requirements.

Referencing opt-in emails to Spryker

After customers have subscribed to the newsletter in your Spryker shop, Episerver Campaign sends a registration confirmation with a confirmation link that completes the newsletter registration process. To reference the confirmation link to Spryker, adjust the field function in the confirmation link.

1. Log in to Episerver Campaign.
2. Go to start menu > **Campaigns** > **Confirmations**.
3. Select the confirmation mailing that Episerver customer support has set up in your client and that is to reference to your Spryker shop.
4. Click **Edit**.
5. In the **Edit confirmation mailing** window, hover over the message node and click **Properties** .
6. Click **Edit content**.
7. In the **Edit content** window, click the name of the paragraph that contains the confirmation link.
8. In the right **Content** area, in the **Text** field, click **Source** .
9. Replace the opt-in link with the following code: `{Double-Opt-In-Link}?id={subscriber_key}`
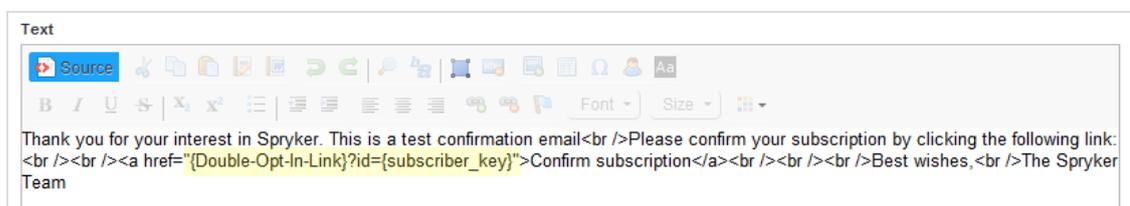
> **Note:** If you ordered a new confirmation mailing from customer support, the mailing is empty. Edit the mailing and insert the desired content. Use the code above for the double opt-in link.

10. Click **Apply** > **Close** > **Save and close**.

Setting up Spryker

Requirements:

- Credentials from your Episerver client.
- Authorization codes of the recipient lists you are going to use. See start menu > **Administration** > **API overview** > **Recipient lists** > **Manage authorization codes**.
- Mailing IDs of the transactional mails you are going to use. See start menu > **Campaigns** > **Transactional Mails**.

> **Tip:** If you are missing the **ID** column in the **Transactional mails** window, click the down arrow **v** in the upper right corner of the table header and activate the **ID** check box.

When you have the necessary information from Episerver Campaign, follow the steps on the Spryker documentation website.

Subscribe and unsubscribe process

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

After you completed the steps described under Spryker integration, customers can sign up for newsletters using the newsletter form in your shop. This topic describes which data fields are to be transmitted to Episerver Campaign and how to reference the unsubscribe link in your newsletter to your Spryker e-commerce platform.

Transmitting registration data to Episerver Campaign

The registration data is transmitted via HTTP request to Episerver Campaign. The following data fields are transmitted:

Field name	Data type	Description	Mandatory field
email	String	Recipient's email address — also the recipient's unique ID	✓
salutation	String	Title (Mr/Ms) of the recipient	✗
firstname	String	Recipient's first name	✗
lastname	String	Recipient's last name	✗
customer_shop_locale	String	Language of the shop via which the customer has registered	✓ (transferred automatically)
spryker_id	String	Spryker-internal shop customer ID	✗
customer_shop_url	String	Shop URL of the customer	✓ (transferred automatically)
customer_login_url	String	Login URL of the customer	✓ (transferred automatically)
subscriber_key	String	Individual key of user in Spryker Commerce	✓ (transferred automatically)

Referencing the unsubscribe link to Spryker

Recipients of a commercial mailing must have the possibility to easily unsubscribe, see Deliverability best practices. Usually this is guaranteed by an unsubscribe link located in the footer of the newsletter. To redirect the unsubscribe link to Spryker, adjust the field function in the unsubscribe link.

> **Note:** This example refers to a message template. You must change the unsubscribe link in all mailings that have already been created but not yet sent.

1. Log in to Episerver Campaign.
2. Go to start menu > **Campaigns** > **Message templates**.
3. Select the message template you want to edit, and click **Edit**.
4. In the **Edit message template** window, in the left **Edit** area, click the name of the paragraph that contains the unsubscribe link.
5. In the right **Content** area, in the **Text** field, click **Source** .
6. Replace the unsubscribe link with the following code: `{Unsubscribe Link}?Subscriber_key={subscriber_key}`

Text

```
Source ✂ 🗐 🗐 🗐 ↻ ↺ | 🔍 | ⬛ ⬒ 🗒 📄 Ω 👤 Aa
B  I  U  S | X₂ X² ⋮☰ | ⬛ ⬛ ☰ ☰ ☰ 🔗 🔗 ▷ | Font ▾ | Size ▾ | ▦ ▾

<span style="font-size:11px;"><span style="color:#FFFFFF;">You received this email, because you subscribed to the
Fabrikam newsletter with the email address <u>example@example.com</u>. If you no longer wish to receive the Fabrikam
newsletter, please click </span><b><a href="{Unsubscribe Link}?Subscriber_key={subscriber_key}"><span
style="color:#FFFFFF;"><u>here</u></span></a></b>
```
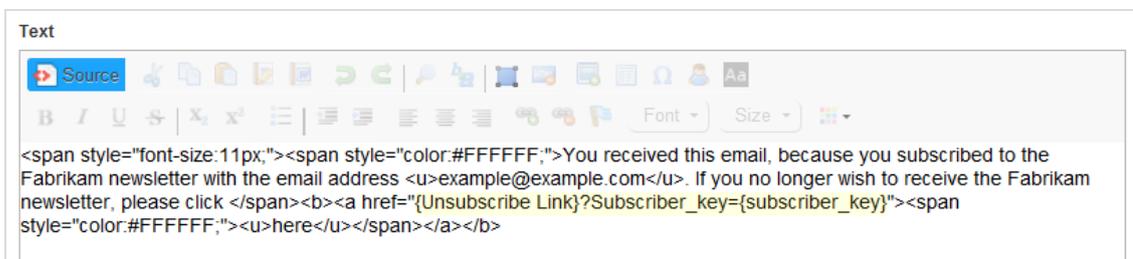
7. Click **Apply** > **Close** > **Save and close**.

Sending transactional mails

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

The Spryker integration lets you send out transactional mails using Episerver Campaign's efficient server infrastructure. The sending is done via HTTP-API directly from Spryker.

You can use transactional mails to respond to customers' actions in your shop, such as order confirmations, or to send system emails, which include:

- Login confirmation
- Password changes and confirmation
- Order confirmations

Configuring transactional mails in Episerver Campaign

Sending of transactional mails requires a template in Episerver Campaign, which uses field functions to insert sent variables into relevant locations. This creates the finished transactional mail with layout, and sends it to the recipient. The sending and receiving of the content of the variables takes place using the transaction recipient list as a buffer.

1. The Spryker integration sends the variables.
2. The variables are written into the transaction recipient list: each variable into the relevant recipient list field.
3. Using field functions, Episerver Campaign copies the template with the individual variables from the transaction recipient list and places it into the desired location in the transactional mail.
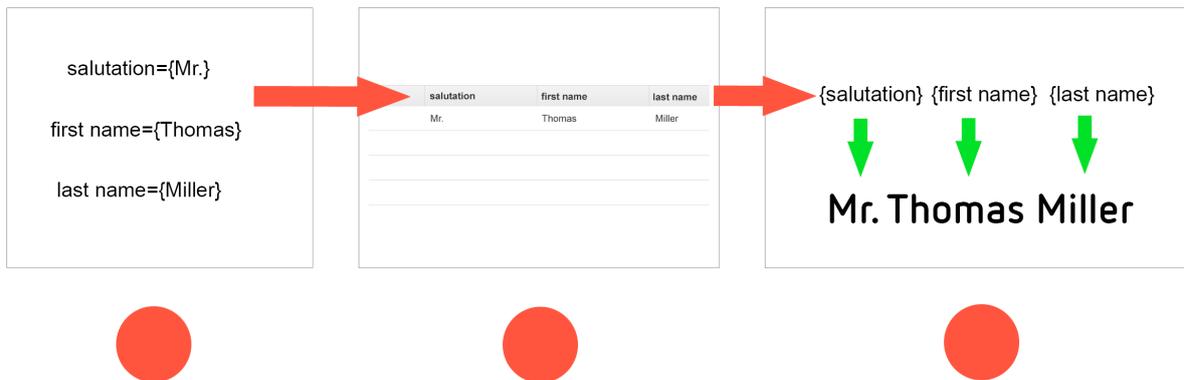
Recipient list fields in Episerver Campaign's transaction recipient list

By default, the transaction recipient list contains the following fields.

Field name	Data type	Description
email	String	Email (required)
salutation	String	Title
firstname	String	First name
lastname	String	Last name
spryker_id	String	Spryker ID

Field name	Data type	Description
customer_shop_locale	String	Language setting in customer shop
customer_shop_url	String	Customer shop url
customer_login_url	String	Customer login url
customer_reset_link	String	Customer reset link
language	String	Language
order_number	String	Order number
order_comment	String	Order comment
order_orderdate	String	Order date
order_subtotal	String	Order Subtotal
order_discount	String	Discount on order
order_tax	String	Tax on order
order_grand_total	String	Total sum of order
order_total_delivery_costs	String	Delivery costs
order_total_payment_costs	String	Payment costs
subscriber_key	String	Individual key of user in Spryker Commerce

Creating a template in Episerver Campaign

Create a template and add the desired transactional mail texts (the unchangeable, static texts that are to be sent to recipients). Insert field functions in places where you want to show content of the Spryker variables.

About field functions

Field functions are placeholders that refer to a specific recipient list field in your transaction recipient list. The variables and content of the variables sent from Spryker are written into the relevant recipient list fields in your transaction recipient list. Your field functions load relevant content from the referenced recipient list field in the next step.

Example

Set up a transactional mail text that welcomes each customer using the last name and the order date. For this you would need the variables **salutation**, **lastname** and **order_orderdate**.

The content of the variables is first written to a relevant recipient list field of the transaction recipient list (from Spryker via the HTTP API). To access these recipient list fields, insert the individual field functions into the Episerver Campaign template and place the name of the recipient list field in curly brackets. To import the variable contents, the static text and field functions in the Campaign template could look like this:

```
Hello, {salutation} {lastname}!
```

```
Thank you for your online order from {oder_orderdate}.
```

The example will appear in the sent transactional mail as follows:

Hello, Mr. Miller! Thank you for your online order from August 3.

To create the template:

1. Log in to Episerver Campaign.
2. Go to start menu and select **Campaigns** > **Transactional mails**.
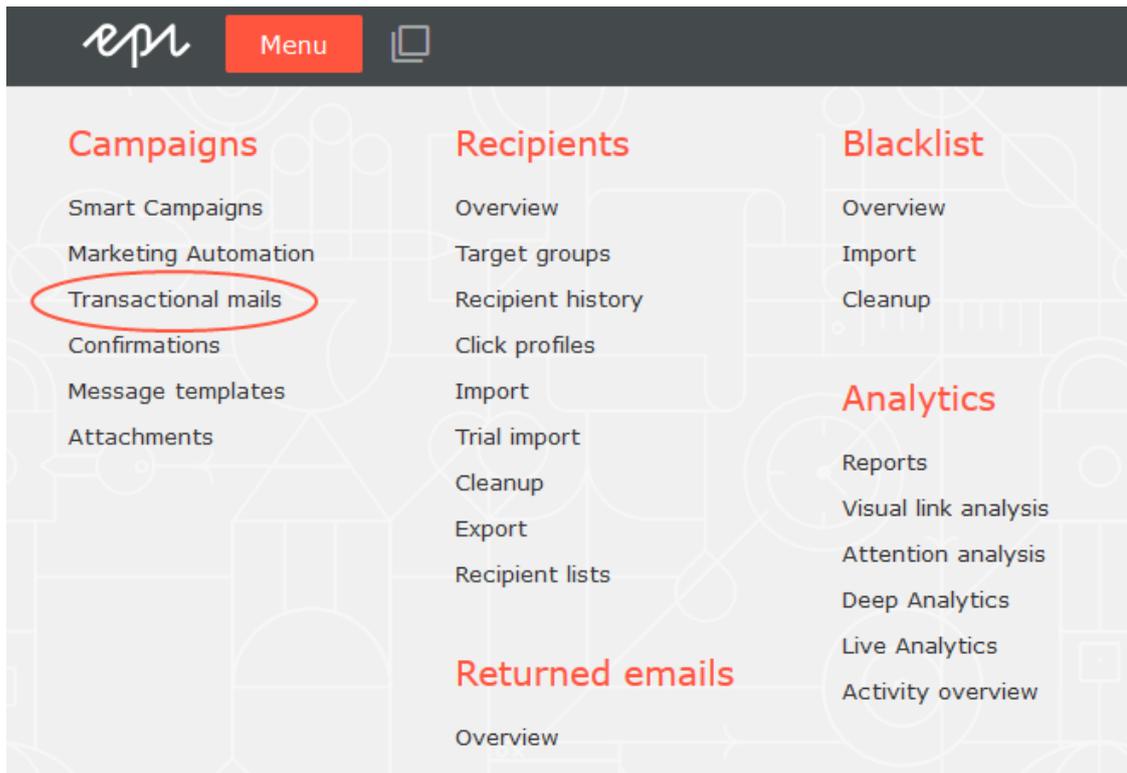
3. Click **Create**.
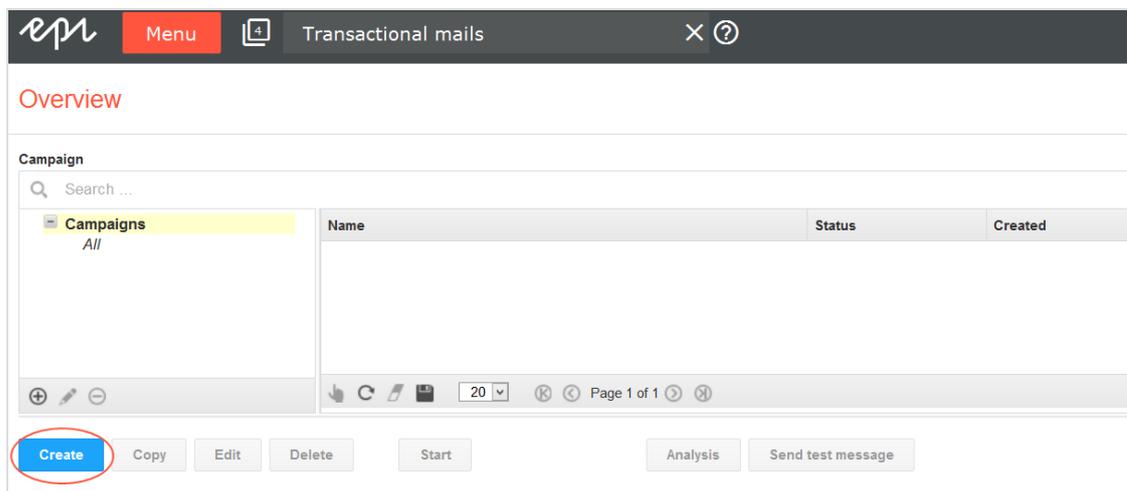
4. Drag the **Recipients** node from the left action area to the workspace area on the right.

5. In the **Recipient lists** drop-down list, select your transaction recipient list.
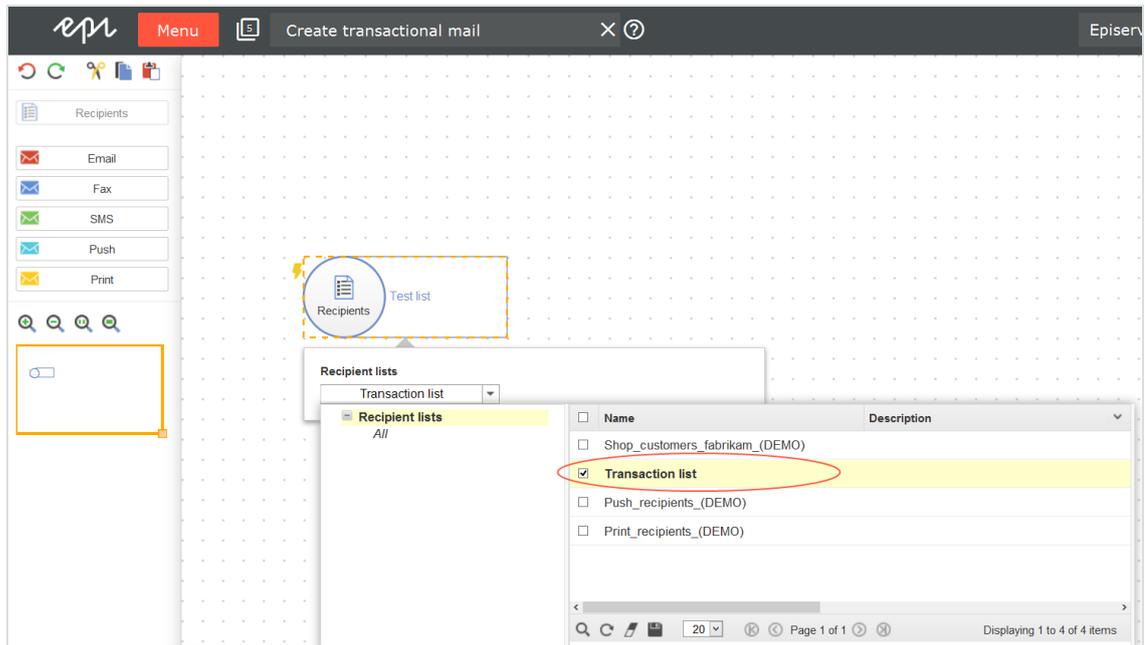
> Note: Customer support sets up a separate transaction recipient list. Be sure you use this transaction recipient list, instead of a regular recipient list.

6. From the left action pane, drag a message node with the media type **Email** into the workspace.

7. In the **Name** box, assign a concise name to your transactional mail (for example, *order confirmation*).
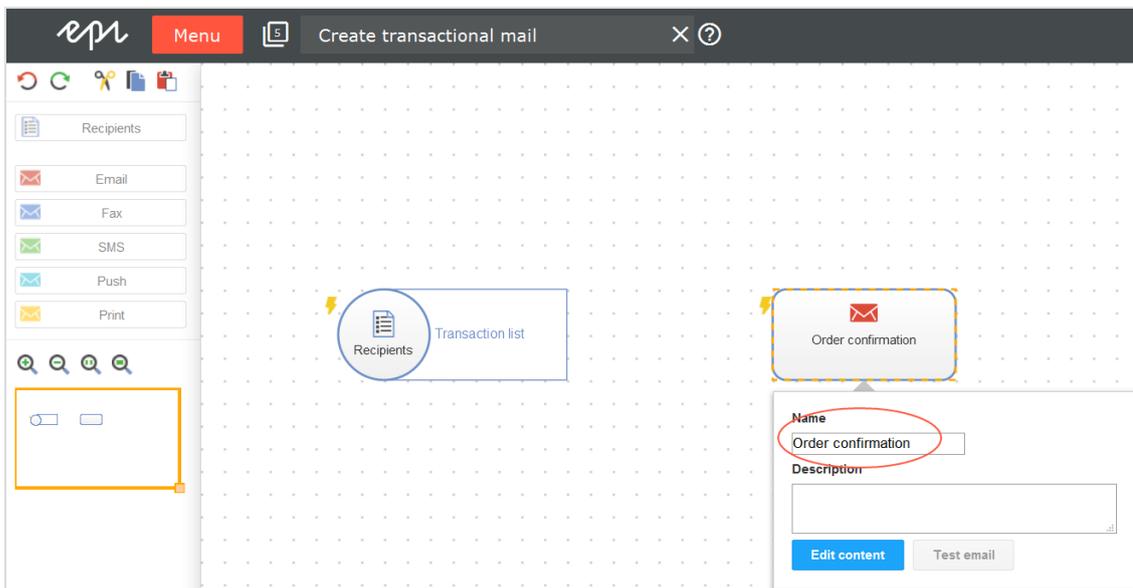
8. In the context menu for the messages node, click **Edit content**.

9. In the **Template** drop-down list, select the desired template and confirm your selection by clicking **Next**.

10. Configure the template for the transactional mail according to your requirements. Enter a subject and insert the static texts that you want recipients to receive, into the content paragraphs. Insert the relevant field function for the recipient list field of the transaction recipient list into places where variables from Spryker should appear (see the previous example in this topic).

11. Click **Close**.

12. Connect the **Recipient** node with the message node.
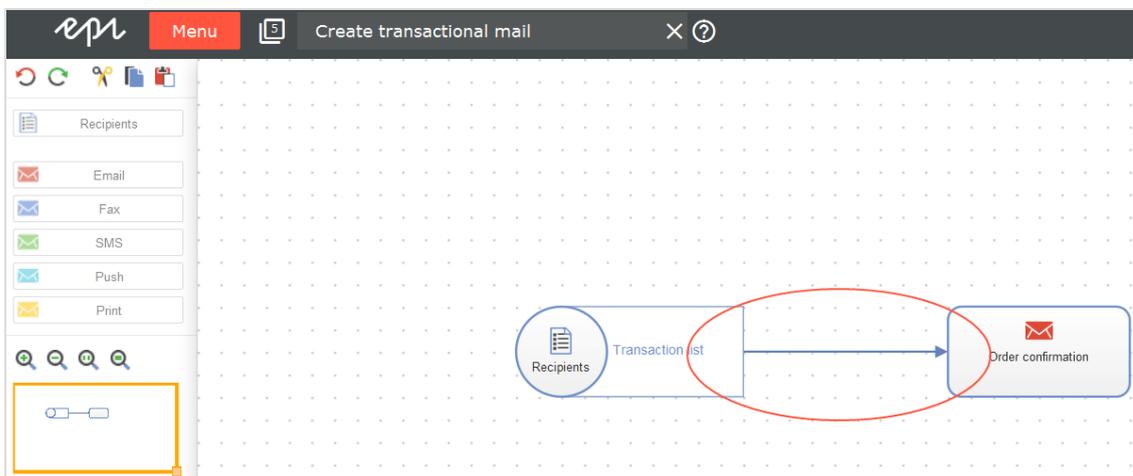
13. Click **Save and close**.

14. To activate your transactional mail and start the sending process, select the mailing in the **Transactional mails** overview and click **Start**.

Configuring transactional mails in Spryker

To set up transactional mails in Spryker, follow the steps on the Spryker documentation website.

Web analytics integrations

Episerver Campaign supports preconfigured interfaces for most web analysis products. Functionality and tracking data aggregation options vary between tools. Data transfer is usually bi-directional, so that mailing, recipient, and tracking data is available in both Episerver Campaign and the web analyses software. The raw data Episerver Campaign receives from the web analyses software is available in the Target Groups, Marketing Automation, and Deep Analytics modules.
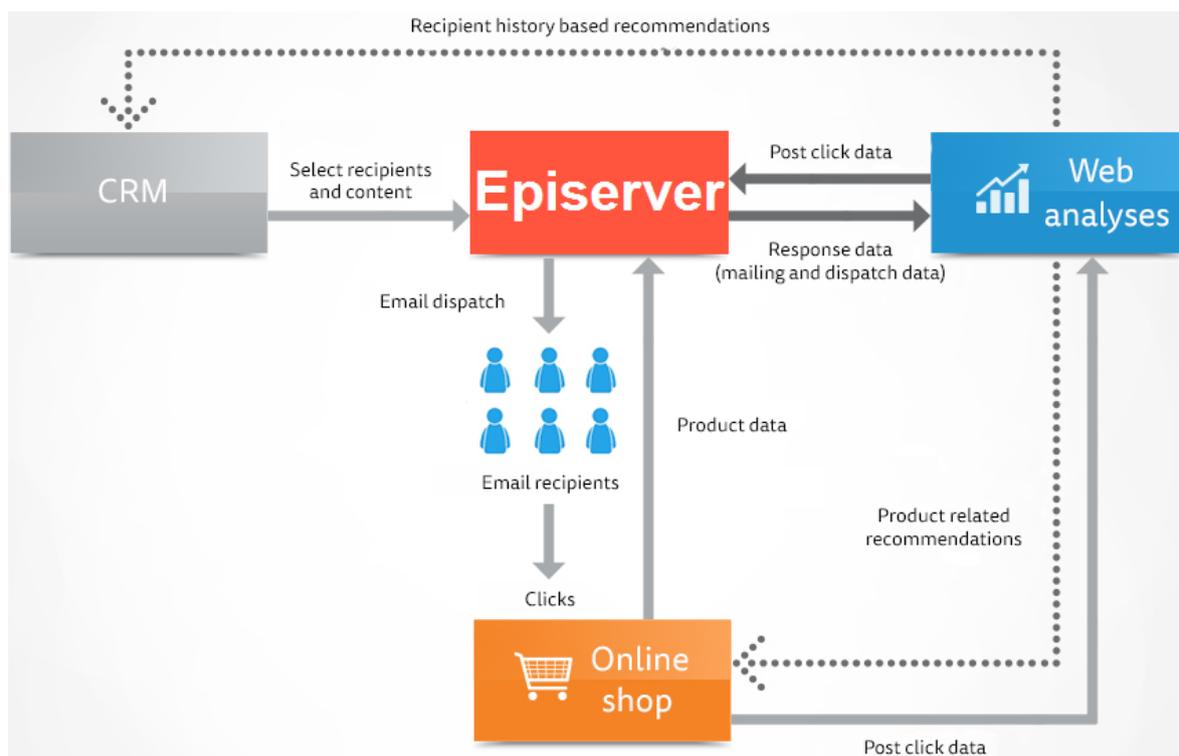
Log in to the client interface of the web analysis software to set up and configure the integration. Customer support sets up the integration for your Episerver Campaign client.

Web analyses systems

Integrations	Adobe Analytics	econda	etracker	Google Analytics	intelliAd	Webtrekk
Campaign tracking	✓	✓	✓	✓	✓	✓
Purchased products	✓	✓	✓	✗	✗	✓
Viewed products	✓	✓	✓	✗	✗	✓
Abandoned shopping carts	✓	✓	✓	✗	✗	✓
Revenue	✓	✓	✓	✗	✗	✗
Remarketing campaigns*	✓	✓	✓	✗	✗	✓
Recommendations	✗	✓	✗	✗	✗	✗
User-defined segments*	✓	✗	✗	✗	✗	✓
	Setup	Setup	Setup	Setup	Setup	Setup

Note: * Remarketing campaigns support only bi-directional integrations.

* User-defined segments are configured once at the initial integration setup, and submitted with each data transfer to Episerver Campaign.

Data generation

Web analytics software tracks any website visitor action, from entry to the exit point. Actions are aggregated to get click paths, segments or funnels. Additional actions such as viewed or purchased products, and abandoned

carts are enriched with product data (ID, price, category, number of purchased items and so on). Finally, this data is correlated with a recipient in your Episerver Campaign client. This can be done in two ways:

- **The entry point is a click on a link in a mailing**. The email address of the recipient is known and is associated with every action the recipient carries out (Post-click tracking). Until the recipient leaves the website, actions are associated with this email address.
- **The customer logs in or registers with an email address**. Actions are tracked and stored with a temporary ID. If the visitor uses an email address to log in or register, you can associate these actions with the email address retroactively (user event tracking). If the visitor's browser accepts cookies, you can store and associate actions even if the visitor leaves the current session and returns later.

Triggered campaigns

Use web analyses to trigger automated campaigns where a mailing is sent to a recipient based on criteria matching:

- **Remarketing**. Recipients that viewed a certain product or have put it in the shopping cart receive a mailing with recommendations for similar products. This can be combined with a [coupon code](#) for these products.
- **Cross and upselling**. Customers who have ordered a certain product receive an order confirmation with complementary products.
- **Reactivation**. Inactive customers receive an incentive mailing with recommendations according to their customer history. These can be combined with a [coupon code](#) valid for a limited time.

Regular campaigns

Integrate a web analyses software into regular mailings to increase relevance for recipients:

- **Recommendations based on recipient history**. Generate product recommendations that take into account previous purchases, as recipients pay more attention to personalized offerings with products of interest. Mailings with personalized recommendations have a higher conversion rate than other mailings.
- **Recommendations based on products from same price segment**. Analyze the preferred price range for a recipient, and send product recommendations from the same price segment, to increase conversion rate.

Adobe Analytics integration

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

Adobe Analytics integration lets you use Episerver Campaign and product data from Adobe Analytics in mailing campaigns. Adobe Analytics collects visitor activity data that you can use to create fine-tuned segments in Episerver Campaign, such as specifically addressing customers with abandoned shopping carts in a remarketing campaign.

The Adobe Analytics integration allows bi-directional exchange of mailing and action data. To access exchanged data, you first need to implement Adobe Analytics on your website. The Adobe Analytics data is updated daily in Episerver Campaign, available for use in regular mailings, transactional mails and for Marketing Automation.

Data generation

Key mailing data

The *output* channel from Episerver Campaign to Adobe Analytics is used to send key mailing data (KPIs). Data is sent in the background each day.

> **Note:** When data is sent, there may be a delay before it appears in Adobe Analytics.

Classifications (fixed mailing data):

- Mailing ID
- Mailing name
- Mailing description
- Media code (see Grouping your mailings in Episerver Campaign)
- Date sent

Events

- Date of creation (when the action occurred)
- Number of emails sent
- Number of emails delivered (calculated value)
- Openings and clicks (only absolute values -not unique- are transferred)
- Clicks (only absolute values -not unique- are transferred)
- Canceled subscriptions
- Soft bounce
- Hard bounces
- Total number of bounces (calculated value)

Recipient segments

Using the *feedback* channel, you can create segments based on visitor activities, and send these to Episerver Campaign. A segment comprises events that match defined criteria, for example a product purchase.

The following segments are defined by the integration:

- **Product purchase**. (Product Purchases (broadmail)) Includes site visitors with a recipient ID and an event of type **Order**.
- **Product view**. (Product Views (broadmail)) Includes site visitors with a recipient ID and an event of type **Product View**.
- **Abandoned shopping cart**. (Product Abandonment (broadmail)) Includes site visitors with a recipient ID and an event of type **Cart Addition**, but *without* a corresponding **Order** event.
- **PostClicks**. Generic non-configurable segment containing site visitors with a recipient ID, a mailing ID, a Mailing-to-user ID, a date, and a media code. This segment is available for creating target groups in Episerver Campaign as the criterion *has created one or more post-clicks*.

Custom-defined segments can also be sent to Episerver Campaign. See **Exporting segments and using them in Episerver Campaign**.

Setting up the integration

The initial steps are done in Adobe Analytics by Adobe. For bi-directional data exchange, you also need an Adobe Analytics user account with administrator rights. Contact Adobe customer support (additional charges may apply).

Linking the Data Connector

When the integration is set up in Adobe Analytics, link the **Data Connector** in Adobe Analytics with Episerver Campaign and activate the integration.

1. Log in to Adobe Analytics with your user name.
2. In the menu bar, hover over the **Admin** option to display the drop-down list.
3. Click **Data Connectors**.
4. Hover over **optivo broadmail** to open the context menu.
5. Click **Add new**. Accept the terms and conditions.
6. In the pop-up window, select the report suite to use.
7. In the field below, enter a name to use for the integration Data Connector.
8. Confirm by clicking **Create and Configure This Integration**.

Configuring the Data Connector

In the **Configure** tab, you specify a range of variables for the Episerver Campaign integration, together with custom fields. You can allocate both types to the conversion variables (**eVar**) and success events (**Event**) in Adobe Analytics.

1. In the drop-down lists under **SiteCatalyst eVar** and **SiteCatalyst Event**, select the conversion variables and success events from Adobe Analytics to allocate to the Episerver Campaign integration variables.

   > **Note:** The Episerver Campaign variables in the **Configure** tab under **Metrics** marked with a red star *, must be allocated to a conversion variable or success event from Adobe Analytics.

2. If needed, enable the **Rename the chosen SiteCatalyst** metric and enter a new name.

Implementing Adobe Analytics on your website

1. Select your preferred reporting suite in Adobe Analytics.

2. Define the success events and conversion variables.

3. Embed the script generated by Adobe into each page on your website. In the JavaScript code, assign relevant variables that apply for each context. Dynamic values are assigned depending on the e-commerce system or website administration software used:

   Example

   ```
   s.products=";Hoody_Women_1;1;49.95" /* Assigns the product variables. */
   s.events="prodView" /* Set the event */
   s.eVar4="HoodyWomen1" /* Context parameter*/
   -var date = new Date ();
   s.eVar5=date.toGMTString(); /* Date of action parameter */
   ```

Setting up the integration in Episerver Campaign

Contact customer support to set up the integration within Episerver Campaign. The integration setup by Adobe for your Adobe Analytics user account is required here.

Exporting and using segments

Configuring segments

Before you can export segments to Episerver Campaign, create and activate the segments in Adobe Analytics; see the Adobe Analytics user documentation about how to do this.

1. Log in to **Adobe Analytics** with your user name.

2. In the menu bar, hover over the **Admin** option to display the drop-down list.

3. Click **Data Connectors**.

4. Hover over **optivo broadmail** to open the context menu.

5. In the context menu, click the integration created during installation of the Data Connector.

6. Click the **Configure** tab.

7. In the lower part of the window, click the **Data Settings** tab.

8. Select the segments to export by selecting the check box for the desired segment.

9. Click **Save** at the bottom of the window to confirm.

In the **Configure** tab under **Data Settings** > **Partner Segments**, you can find the segments **PostClicks**, **Product Abandonment (broadmail)**, **Product Views (broadmail)** and **Product Purchases (broadmail)**. These are predefined in the Data Connector for Episerver Campaign. If needed, you can prevent the **Product Aban-**

donment (broadmail), Product Views (broadmail) and Product Purchases (broadmail) segments from being sent by clearing the check box next to the relevant segment.

Standard variables

The Adobe Analytics integration sends a range of standard variables to Episerver Campaign. This includes data from for example **Product Variable**, containing up to four values (see Adobe Analytics Implementation Guide):

- Item number or context
- Order
- Quantity
- Price

Optional: Additionally, you can use the following custom variables (fields):

- Custom Float 1–4
- Custom Text 1–4

> **Note:** To use custom fields, additional client configuration is required. Contact customer support.

See Configuring the Data Connector to learn how to assign these custom variables in Adobe Analytics after adapting the recipient lists.

See Creating target groups in Episerver Campaign to learn how to create target groups using data sent from custom variables.

> **Note:** In Episerver Campaign, you have access to the exact values defined in Adobe Analytics for each segment.

Data security

Personal data security is guaranteed for both output and return channels. Mailing links are expanded with anonymized recipient and campaign data. This prevents parameters from being associated with a recipient, either directly or by fraud via third parties. The return channel re-associates the anonymized data with the mailing recipients and campaigns.

Standard segment parameters

Use these standard parameters for each segment to create target groups in Episerver Campaign:

- **Mailing ID**. ID of the mailing from which the action originated.
- **Recipient ID**. ID of the recipient who started the action.

- **Mailing to user ID**. Unique ID associating a recipient with a mailing.

  > Note: **Mailing ID**, **Recipient ID**, and **Mailing to user ID** are required and cannot be modified.

- **Date**. Field for date and time zone in international format.

  Use a valid date format, for example:

  ```
  EEE MMM dd YYYY HH:mm:ss 'GMT'Z // Javascript Date.toString()
  EEE, dd MMM yyyy HH:mm:ss 'GMT' // Javascript Date.toGMTString()
  ```

- **Context**. Field for important information about relevant usage context, for example item number.
- **Action**. This parameter is no longer used, *do not* associate it with a variable in Adobe Analytics.

Configuring conversion variables and success events

1. Log in to **Adobe Analytics** with your user name.
2. In the menu bar, hover over **Admin** and click **Report Suites**.
3. Select **Edit settings** > **Conversion** > **Conversion Variables**.
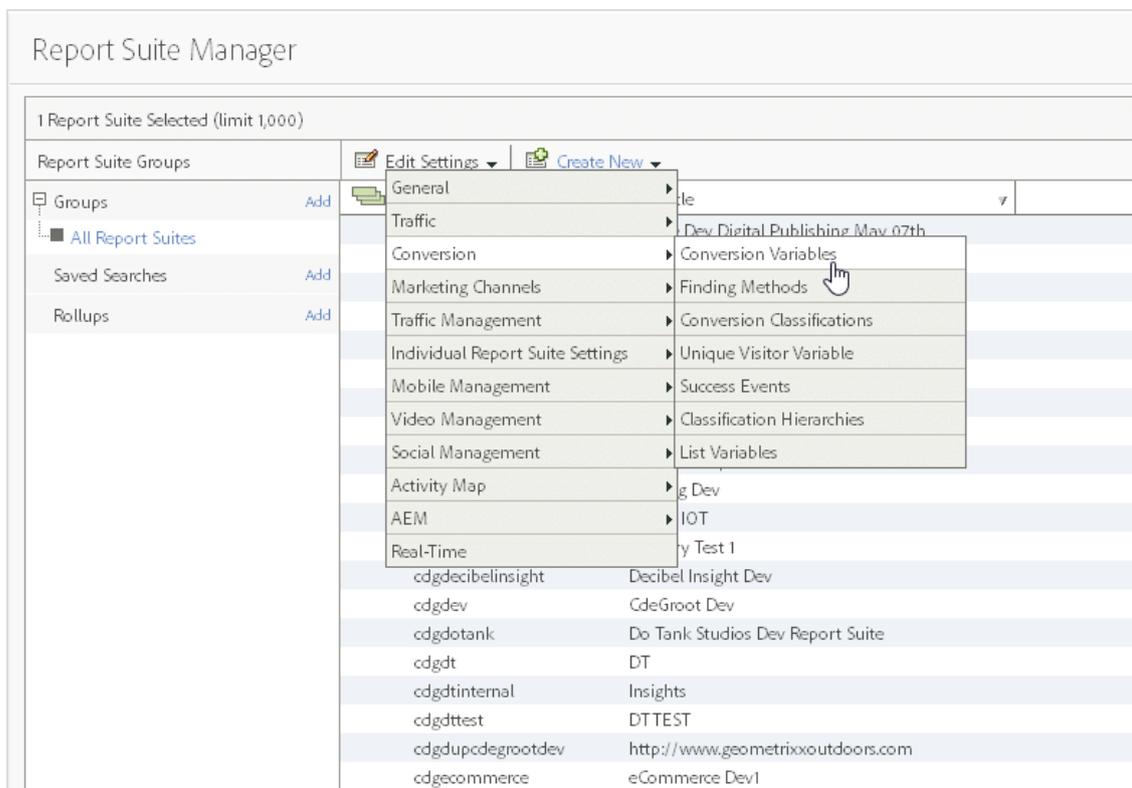
4. Configure the conversion variables (**eVar**) and click **Save**. You are then given the name and number of the eVar.

5. Note the name and number of the variables. You will map these with Episerver Campaign integration variables later.
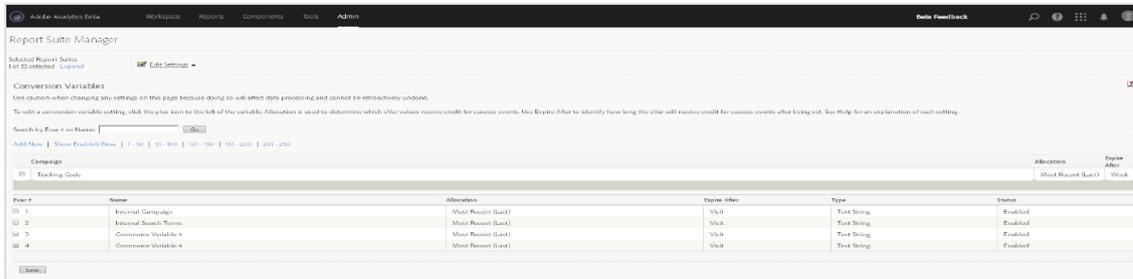
To define success events, do as described above, selecting **Success Events** instead.

Adobe Analytics provides the events and conversion variables below. See Adobe Analytics help for details.

Type	Name	Data collection	Description
Event (counter)	Hard Bounces*	Automatically imported by Episerver Campaign	Number of permanently undeliverable emails.
Event (counter)	Soft Bounces*	Automatically imported by Episerver Campaign	Number of emails that are temporarily undeliverable.
Event (counter)	Clicked*	Automatically imported by Episerver Campaign	Number of recipients that clicked a link in the email.
Event (counter)	Opens*	Automatically imported by Episerver Campaign	Number of recipients that opened the email.
Event (counter)	Sent*	Automatically imported by Episerver Campaign	Number of emails sent.
Event (counter)	Unsubscribed *	Automatically imported by Episerver Campaign	Number of recipients that opened the email but then clicked the unsubscribe link to stop receiving emails.

Type	Name	Data collection	Description
eVar	Recipient ID*	Recorded using email link parameters and automatic collection methods or using a JavaScript plug-in.	The ID of the recipient: Using this ID, actions such as product purchases, abandoned carts and so on can be clearly assigned and later used for remarketing campaigns.
eVar	Mailing ID*	Recorded using email link parameters and automatic collection methods or using a JavaScript plug-in.	ID of the mailing: This ID is a unique string value. Each mailing has its own unique ID.
eVar	Mailing To User ID*	Recorded using email link parameters and automatic collection methods or using a JavaScript plug-in.	This unique ID links a specific recipient to a mailing.
eVar	Media Code*	Recorded using email link parameters and automatic collection methods or using a JavaScript plug-in.	A media code can be specified for each mailing in Episerver Campaign. This can be used for additional descriptions or groupings.
eVar	Action Date*	Recorded via JavaScript plug-in.	You can enter a date for a particular context here: • a purchase date • the date on which a product was viewed • the date on which a purchase was abandoned ISO 8601 date formats are accepted. Date formats may also be imported that are normally created by the **Date().toString()** and **Date().toUTCString()** JavaScript functions.
eVar	Context	Recorded via JavaScript plug-in.	You can freely enter context information here that is sent to Episerver Campaign. This will mostly be an item number.

Type	Name	Data collection	Description
eVar	Type of Action	*deprecated (no longer used)*	

> **Note:** Episerver Campaign integration variables indicated with a red star * must be assigned to a conversion variable or event in Adobe Analytics.

Creating target groups for use with Adobe Analytics

To use the transferred analytics data, you must first create target groups in Episerver Campaign.

1. Open the start menu and select **Recipients** > **Target groups**.
2. Click **Create**.
3. In the **Target group definition** area, click **Add +**.
4. In the second drop-down list, select **Action** and in the third list, select **has created one or more post-clicks**.
5. If you are using multiple post-click services, select **web analytics** in the **Service** drop-down list.
6. In the **Mailing** drop-down list, select mailings to which the data is related. If nothing is selected, all mailings are analyzed.
7. Select a date or time in the **Period** drop-down list to only select post-clicks created within a defined time range or at a certain date. Time entered as a number of days ("Exactly 30 days ago") refer to the current day.
8. In the drop-down list **Category**, select a predefined category and an operator (for example *equals*) and a comparison value.

   Example: To select all recipients who purchased a product, click **Action** and in the field to the right, enter *purchase*. Ensure correct spelling so it is identical to the name used by Adobe.

9. Click **Apply** ✔ . This target group rule will select recipients who have purchased any type of product. To refine the target group to recipients who purchased a specific product, add another rule.
10. In the **Target group definition** area, click **Add +**.
11. Select the **Product name** category and enter a product name. This field uses auto complete, matching products are displayed as you type. This entry must be identical to the entry in the database to find matches. If unsure, use the auto complete suggestion.
12. Add additional rules to this target group. You can combine the Adobe Analytics web analytics data with other recipient and campaign data, make sure to test the created target group before first use. In the **Analysis** area, select a recipient list and click **Calculate**.
13. Click **Apply** ✔ .

14. Open **Properties** and enter a name for the target group. Optionally, enter a description.
15. Click **Create**.

Processing analytical data

Evaluating email channel in Adobe Analytics

You can evaluate data sent from Episerver Campaign in Adobe Analytics. Emails sent via Episerver Campaign contain three additional HTTP parameters: **mid**, **rid** and **m2u**. You can use these parameter names in **Marketing Channel Processing Rules**, after ensuring that no other parameters with these names are sent via other channels. See the Adobe documentation for information about automatic assignment of interactions to marketing channels in Adobe Analytics.

Grouping mailings in Episerver Campaign

When you create a mailing, you can specify a media code in the **Web analysis** tab in **Mailings Classic** to be used for grouping multiple mailings in Adobe Analytics. In **Smart Campaigns**, you can specify a media code in the message node settings. For example, assigning mailings within a multi-stage campaign to the same media code, lets you evaluate these mailings together. No further configuration is necessary.

Troubleshooting the Adobe Analytics integration

The table below lists common errors when working with the Adobe Analytics integration. If the problem continues after trying the suggested solution, contact Episerver **customer support** or Adobe customer support.

Problem	Possible cause	Resolution
Data sent from Episerver Campaign is not available in Adobe Analytics.	Adobe Analytics is experiencing a data processing delay.	Wait at least 4 days and check again to see if the data has become available in Adobe Analytics. If the problem continues, contact Adobe customer support.
Data from Adobe Analytics is not being sent to Episerver Campaign or is incomplete.	Some segments have not been activated for transfer in Adobe Analytics.	Activate the segments for them to be sent. See **Exporting and using segments**.
Data transfer fails or you are unable to set	You do not have an Adobe Analytics user account with admin rights.	Contact Adobe to set up an Adobe Analytics user account with admin rights.

Problem	Possible cause	Resolution
up the data transfer.		
Data transfer fails or is incomplete.	Required Episerver Campaign integration variables indicated with a red star * have not been assigned to a conversion variable or event.	Allocate required variables, see Configuring the Data Connector
Data transfer fails.	Adobe Analytics integration has not been enabled.	Contact customer support.
Adobe Analytics contains no data about visitors to your site.	The variables have not been implemented, or are implemented incorrectly, on some pages of your website.	Implement and/or correct the variables on each page of your website. See Implementing on your website.

Google Analytics integration

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

The Google Analytics integration allows for the allocation of email recipients and website visitors, to use the evaluation capabilities of Google Analytics to measure the results of email marketing campaigns. The Google Analytics integration offers a central platform for the evaluation of online campaigns, as click rates recorded by Episerver Campaign can be evaluated alongside financial success of campaigns.

Setting up the integration

You need a Google Analytics user account to access the Google Analytics interface. Contact Episerver customer support to set up the integration in your client. No mailing setting adjustments are needed, all mailing data is automatically transferred to Google Analytics.

Transferring data

The integration uses an automatic, generic link extension which adds parameters used by Google Analytics for the allocation of campaigns to links used in the mailing. Google Analytics uses cookies to identify returning visitors. Recipients who initially accessed the website via an email campaign, are identified as email campaign visitors also when returning via the website.

Using the link extension, global shipping data is transferred to your Google Analytics account after dispatch of a mailing. You can view and influence the data aggregation analysis in Google Analytics.

These parameters are used for link extension and data transfer:

- utm_source
- utm_medium
- utm_campaign
- utm_term
- utm_content

Use these standard parameters to automatically transfer data, for example:

- Date of creation
- Mailing ID
- Mailing name
- Mailing description
- Mailing type
- Recipient list fields

Examples:

- To transfer the mailing type **Newsletter** to Google Analytics, use the **utm_source** parameter.
- To transfer the mailing type, use the **utm_medium** parameter, and for the mailing name, the **utm_campaign** parameter.

You can also combine two data sets and transfer them together using one standard parameter. The mailing name and the corresponding creation date can for example be combined using the **utm_campaign** parameter. For other combinations and more information, contact Episerver customer support.

Viewing and using data

When a client is linked with Google Analytics, data synchronization is automatic and invisible to the website visitor. See below how to access and view the data in Google Analytics.

Dashboard

The dashboard lets you view important configurable statistics.
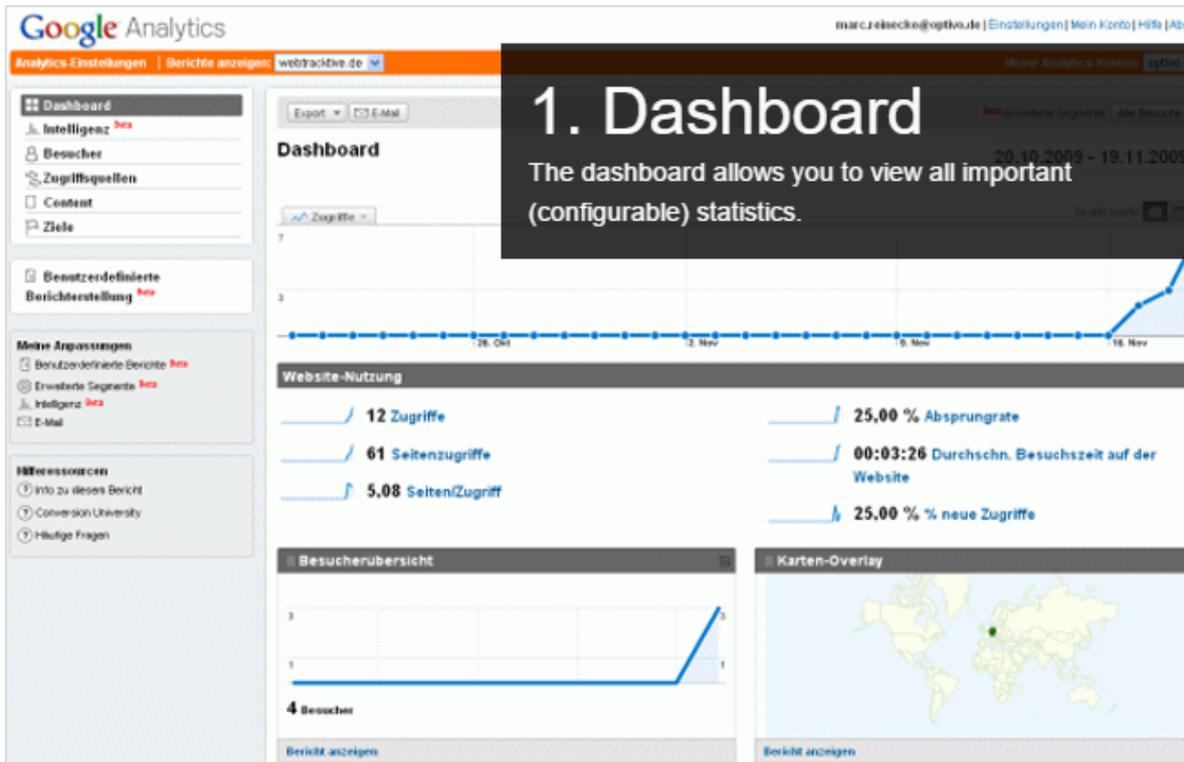
Campaigns

Under **Campaigns**, you can view website hits generated by email campaigns.
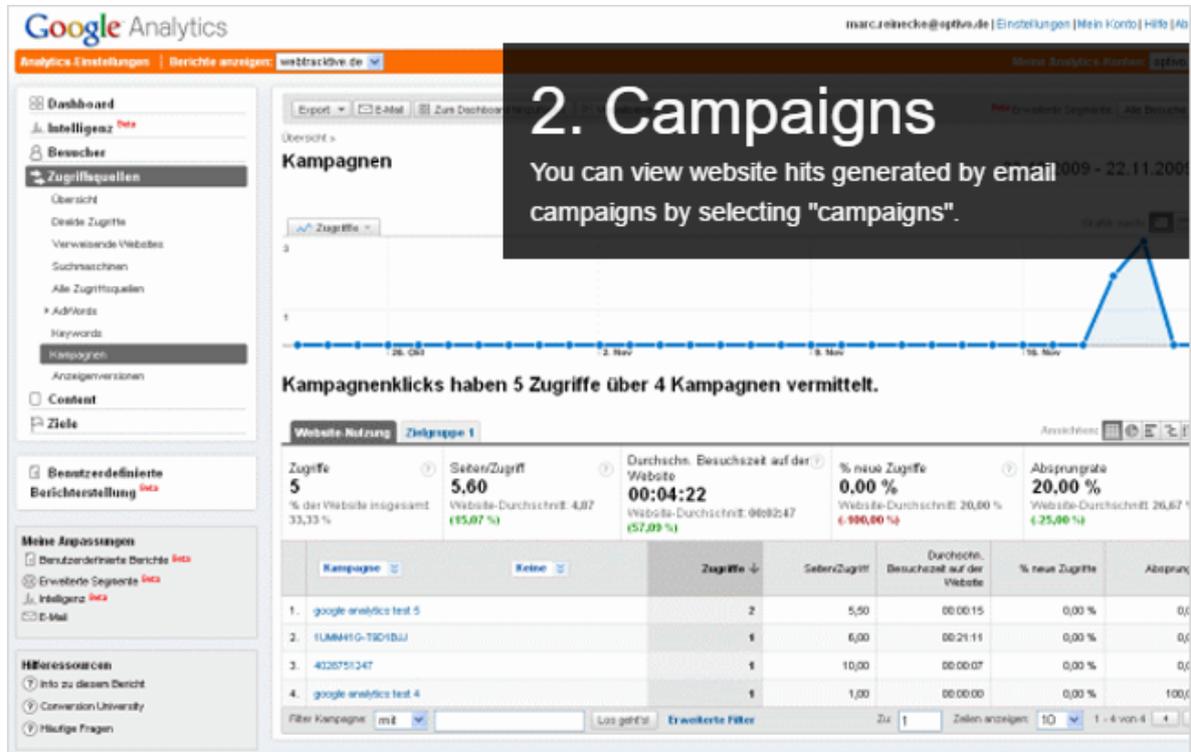
Campaign details

Click the campaign title to view available values in order of time.

Source of access

Website hits generated by a mailing are labeled by source and medium, corresponding to the company name and medium, for example **webtracktive/email**.
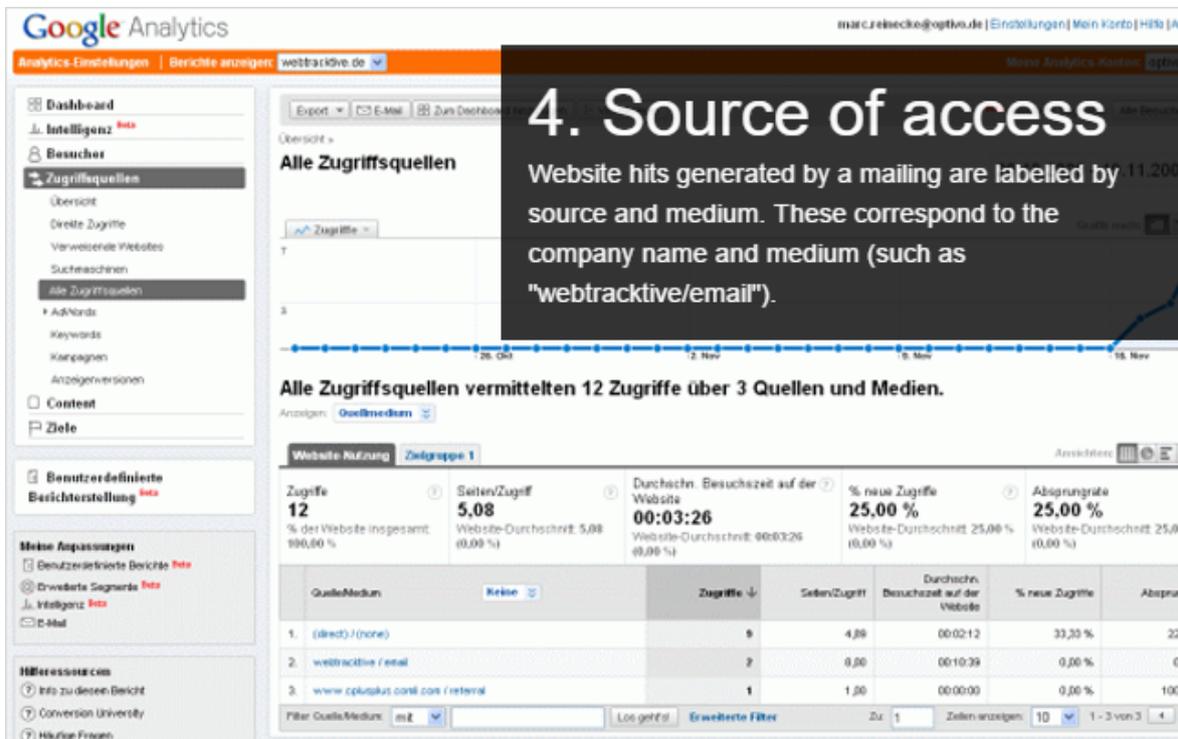
Google Tag Manager integration

Note: We are currently revising the documentation for the Google Tag Manager integration and will place it at your disposal as soon as possible. Thank you for your patience.

Step 1. Creating variables for saving the recipient ID

Note: We are currently revising the documentation for the Google Tag Manager integration and will place it at your disposal as soon as possible. Thank you for your patience.

Step 2. Configuring actions

Note: We are currently revising the documentation for the Google Tag Manager integration and will place it at your disposal as soon as possible. Thank you for your patience.

Step 3. Publishing changes

Note: We are currently revising the documentation for the Google Tag Manager integration and will place it at your disposal as soon as possible. Thank you for your patience.

intelliAd integration

Note: This topic is for administrators and developers with administration access rights in Episerver Campaign.

The intelliAd integration lets you evaluate and optimize email campaigns together with other online channels. In addition to the email channel, intelliAd can analyze search engine marketing, affiliate marketing and price search engines. Clicks from newsletters are tracked and assigned to an email channel, and displayed in the campaign overview.

The integration uses link masking to redirect links in a tracked mailing via the intelliAd server. The masked links are automatically generated and include multiple parameters enabling them to be assigned to a specific client. You generate an ID string in intelliAd and enter it in the **intelliAd** tab when creating the mailing. When clicking on a masked link, the recipient will first be redirected to the intelliAd tracking server (without noticing). The tracking server analyzes the parameters included in the extension and saves them in the database. The recipient is then redirected to the actual target page.

Setting up the integration

You need an intelliAd account but the integration does not require any direct data exchange between Episerver Campaign and intelliAd. In Episerver Campaign, intelliAd is integrated into the mailing creation process.

Extending links

These parameters are added to each mailing link:

- **intelliAdcustomerId**. Identifies the intelliAd customer.
- **marktId**. Identifies Episerver Campaign as the source of the link.
- **channelId**. Identifies the marketing channel, usually **email** or **newsletter**, for mailing links.
- **campaignId**. Identifies a campaign in intelliAd. Multiple channels can be combined into a single campaign.

> **Note:** This ID does not belong to a Marketing Automation campaign in Episerver Campaign.

- **adGroupId**. Identifies an **AdGroup**.
- **subId**. Generated from the mailing ID and the subject of the mailing.

Configuring the mailing for tracking

When creating a mailing, enter the ID string in the **intelliAd** tab in your intelliAd account. The ID string consists of six blocks of numbers using this format:

```
935393533323623131303-100-436373531323623131303-101-101-101
```

Each block of numbers encodes one of the link parameters specified above with the exception of the **subId** parameter, which is generated from Episerver Campaign. The intelliAd tracking is activated when an ID string is saved for a mailing. Links in the mailing are created when the email is delivered, using this format:

```
http://t23.intelliad.de/index.php
   ?redirect=http://www.beispiel.de/shop/products/raincoat-blue
   &cl=12345
   &bm=100
   &bmcl=123
   &cp=111
   &ag=222
   &subid=12345|FirstNewsletter|ProductLink
```

> **Note:** The **redirect** parameter includes the original URL and is URL-encoded. In this example, breaks are added and encoding is omitted for readability reasons.

Links without tracking

By default, the following links are **not** tracked via intelliAd.

- Link to the online version
- Unsubscribe link
- double opt-in link
- Links to landing pages
- SWYN links

Analyzing intelliAd performance

Sign in to intelliAd and select the channel **optivo broadmail** in the dashboard. The timeline displays clicks in the selected channel, and you can filter results according to the criteria you defined.
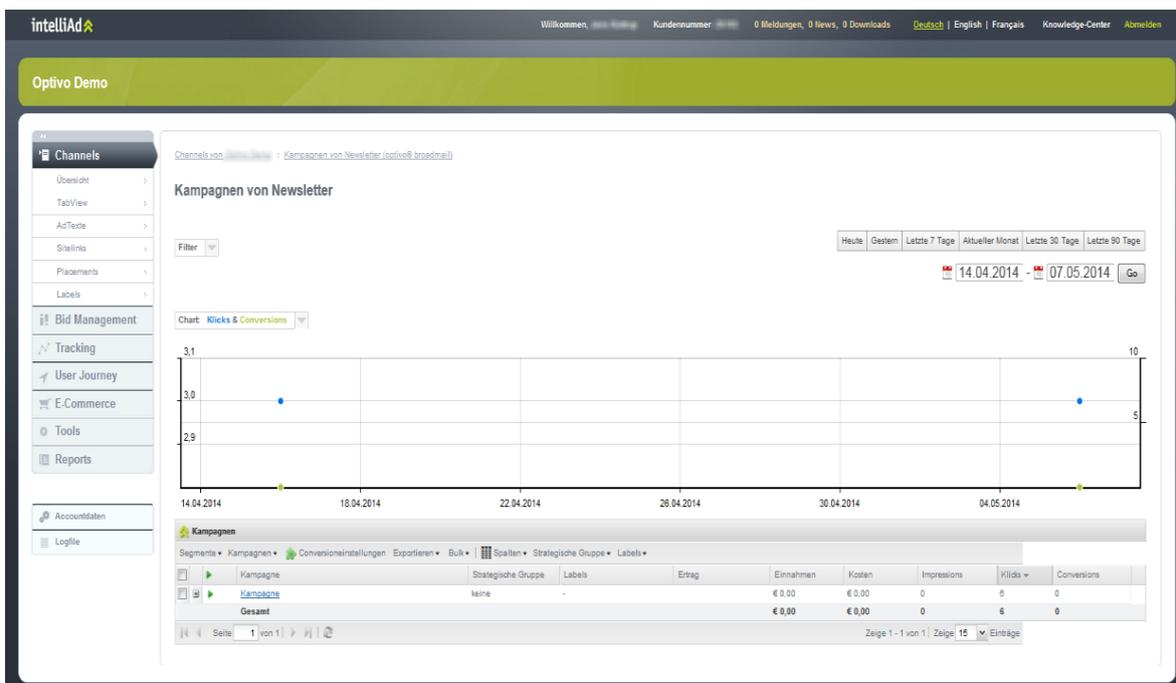
CRM integrations

The Episerver Campaign CRM integrations lets you manage campaigns and select leads and contacts as in your CRM system, and work with mailing creation and dispatch in Episerver Campaign. You can send personalized content and measure campaign performance directly in CRM, and based on the data, design multistage and re-mailing campaigns.

See the CRM Guide for an introduction to working with Episerver Campaign and CRM systems.

CRM systems

Theme	Integration	Microsoft Dynamics CRM	Salesforce	SAP
DOI Round-Trip	Automatic synchronization of unsubscribes	✓	✓	✓
	Send DOI	✓	✗	✗
	Import DOI	✓	✓	✗
	Multiple DOI per entity	✓	✓	✓
	Flexible DOI mapping — Multi client mapping	✓	✓	✓
Campaign	Selections in CRM	✓	✓	✗
	Start campaign	✓	✓	✗
	Assign Episerver Campaign reactions	✓	✓	✗
	Transmission of custom fields	✓	✓	✓
Recipients	Synchronization of recipient lists	✓	✓	✓
	Use Marketing Automation	✓	✓	✓
	Use Smart Campaigns functions	✓	✓	✓
	Custom fields	✓	✓	✓

Theme	Integration	Microsoft Dynamics CRM	Salesforce	SAP
Admin	Flexible client mapping	✓	✓	✓
	Scalability	✓	✓	✓
	Support newest versions	✓	✓	✓
	Full featured admin interface	✓	✓	✗
Messaging	Send transactional-mails	✓	✗	✗
	Omni-channel support (E-Mail, SMS, Mobile Push)	✓	✓	✓
	Bounce management	✓	✓	✓
Platform specific	Support PersonAccounts (Salesforce)	✗	✓	✗
	Support managed packages	✓	✗	✗

CRM integration guide

This section provides an introduction to working with Episerver Campaign, and integrations with CRM systems.

You can integrate email service providers with campaign management, and CRM and business and customer intelligence systems.

Episerver Campaign provides email sending, and SMS, as well as synchronized advertising consents and recipient lists.

- Campaign management. With its closed-loop interface, Episerver Campaign automatically captures transfer of recipient data and return of response data, for example opt-out and bounces, for flexible management of recipient data from the CRM system. You can enrich mailing openings, clicks, bounces, and unsubscriptions, so these events become available as leads or contacts in CRM.
- Opt-in management. You can exchange double opt-in information between Episerver Campaign and a third-party system. Advertising consents can refer to many types of media, for example email, and SMS.
- Synchronize recipient data. Episerver Campaign's entire range of features is available with the synchronization of recipient lists. Marketing Automation or Smart Campaigns are independent of a CRM system, and can return bounces and unsubscriptions.

Managing campaigns with CRM system integrations

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

CRM (customer relationship management) systems generally have the ability to define campaigns. Leads and contacts are added to a campaign – sometimes indirectly via marketing lists or dynamically via machine-learning algorithms – and campaign activities are subsequently defined and executed. Using the *closed-loop service*, you can transfer members of a campaign to Episerver Campaign. With additional meta-information (Client ID and/or opt-in ID and mailing ID), the appropriate mailing is triggered in Episerver Campaign. Events that follow the campaign, such as openings, clicks, bounces or unsubscriptions, are then made available to the CRM system. See Closed-loop Interface.

Personalizing and formatting a recipient

> **Note:** Contact customer support to help you define the **recipient list format** - the columns containing information transferred to Episerver Campaign.

The recipient list must contain the desired personalization information. For example, to use recommendations from CRM, place the product information in the recipient list. To use a personalized greeting and/or complimentary close (so the contact's sales owner appears as point of contact in the salutation), transfer the corresponding sales owner fields.

You can also add recipient list fields to response data, making it easier to assign events in CRM, such as open or click. For example, providing two fields in the recipient list for identifier of entities, these can be transferred back in the response data.

Example: A contact has a unique ID **<contact-id>** and each campaign has a unique identifier **<campaign-id>**. Both fields are added to the recipient list, and the entities are transferred to Episerver Campaign. When clicking the link in the sent email, the recipient receives the result with the corresponding **<contact-id>** and **<campaign-id>**, so you can assign events to a contact or a campaign response.

The displayed fields depend on the CRM system. Typical identification fields may be **<contact-id>**, **<lead-id>**, **<campaign-id>**, **<campaign-member-id>**, **<member-id>** or **<list-id>**.

Protocols and feedback

You can use either SFTP or SOAP protocols for data transfer. SOAP transfers the data via XML (extensible markup language); you have better performance with sending CSV files via SFTP, especially for large campaigns with several hundred thousand campaign members.

When a campaign is sent, Episerver Campaign can create feedback messages such as an email notification. Episerver Campaign can also call up SOAP services and systemically display the processing and send status.

Process sequence

After the CSV file is delivered or data transfer is completed through the SOAP service, no further action is required on the part of the CRM or the requesting party. The following process automatically takes place in Episerver Campaign:

1. After successful transfer, the recipient data is automatically loaded into a recipient list. The recipient lists used for this purpose are subject to a check by the closed-loop services and have the **Z_CampaignUserList** prefix. Lists with this prefix are automatically created and managed. These special lists may not be used for other purposes – neither through interfaces nor through Episerver Campaign's front-end. These lists may not be used, filled nor otherwise addressed using an Episerver Campaign API (application programming interface) method.

2. After the recipient data is fully imported, the specified mailing will automatically be copied. If you start a campaign from the CRM system via the closed-loop service, you will also find a sent mailing in the mailing overview.

3. After the mailing is sent, results are recorded, prepared and made available. These include opens, clicks, bounces and unsubscriptions. Bounces and unsubscriptions are directly linked to an email address and should be saved at the appropriate entities in CRM. For instance, there is no point in continuing to send messages to an email address that has bounced out. If someone unsubscribes, then this must be saved in the appropriate contact and/or lead and, if necessary, in an advertising consent.

> **Note:** Recipient lists match database tables. These are generally generated individually according to your requirements in a format specified by customer support. This format is static and may not be changed without consulting customer support.

broadmail_ID parameter

The **broadmail_ID** denotes a mailing. The advertising channel (email, SMS) also appears on the mailing. Therefore, the **broadmail_ID** can also be used to trace back the medium. In addition to the mandatory **broadmail_ID**, the CRM system can also issue a numerical **wave-ID** for a mailing, with which the mailing wave is identified. If a mailing is sent in multiple steps, then the mailing identity can be inferred using the **wave_ID**. The **broadmail_ID** and the **wave_ID** must be unique Grouping different mailings into one mailing wave is not possible. Furthermore, the recipient's email address is a mandatory field in the recipient list.

Example: The following code block shows an implementation example of how a campaign with two recipients can be started by Episerver Campaign using SOAP services. The surrounding category provides the necessary member variables, for instance, the **closedLoopWebservice** object makes available the methods documented in the SOAP API.

```
/**
```

```
 * Use case: Initialise and start campaign
 * The following class is an implementation on how to start a campaign
 * via Closed Loop Webservice.
 */
private class ImportRecipientsAndStartCampaign extends UseCase {

    @Override
    void runExceptional() throws Exception {
        // create a waveId, fix the template mailing
        _waveId = _closedLoopWebservice.prepareNewWave(
                    _session.getSessionId(), TEMPLATE_CAMPAIGN_ID);
        // The recipient field names can be different for every client
        // and are defined once during the configuration process in
        // optivo broadmail. Within the example code we used
        // recipientFieldNames are for demo purposes with most common
        // used fields.
        String[] recipientFieldNames =
            { "salutation"
            , "firstname"
            , "lastname"
            , "title"
            , "birthday"
            , "mobile"
            , "fax"
            , "email"
            , "street"
            , "zipcode"
            , "city"
            , "state"
            , "country"
            , "extentityid"
            , "extcampaignid"};
        String[][] recipientFieldValues =
            {
            { "Mr."
            , "John"
            , "Doe"
            , "Phd"
            , "17.2.1956"
            , "0049307680780"
            , "004930768078199"
            , "it-demo-mr@example.com"
            , "Wallstrasse 16"
            , "10179"
            , "Berlin"
            , "Berlin"
            , "Germany"
            , "SAP-321XWZ654987"
            , "SAP-987ABG654223"
            }
            , { "Mrs."
            , "Jane"
            , "Doe"
            , "Phd"
            , "17.2.1952"
            , "0049307680780"
            , "004930768078199"
            , "it-demo-mrs@example.com"
            , "Wallstrasse 16"
            , "10179"
            , "Berlin"
            , "Berlin"
            , "Germany"
```

```
                , "SAP-321XWZ654988"
                , "SAP-987ABG654223" } };
        _closedLoopWebservice.importRecipients(
            _session.getSessionId()
            , _waveId
            , recipientFieldNames
            , recipientFieldValues);
        // initialise the point in time the campaign will start to
        // generate response data
        _since = _closedLoopWebservice.getCurrentTime(
            _session.getSessionId());
        _closedLoopWebservice.importFinishedAndScheduleMailing(
            _session.getSessionId(), _waveId);
    }
}
```

You can request the mailing status after transferring a campaign. The following category shows the methods that need to be invoked.

```
/**
 * Use case: Receive campaign status.
 * Use this code to ask campaign status from optivo broadmail. This
 * makes sense after calling the use case "Initialise and start campaign"
 */
private class DetermineCampaignStatus extends UseCase {

    @Override
    void runExceptional() throws Exception {
        if (_waveId <= 0) {
            throw new IllegalStateException("waveId not positive.");
        }

        // Since the campaign is copied before it is started, we
        // have to translate the wave id to the campaign id that
        // was actually sent ...
        long campaignId;
        do {
            campaignId = _closedLoopWebservice.getMailingIdByWaveId(
                _session.getSessionId(), _waveId);
            if (campaignId <= 0) {
                sleepOneMinute();
            }
        } while (campaignId <= 0);

        // customise this to your needs. After a campaign switched to
        // status SENT, the status will be immutable
        while (true) {
            String campaignStatus = _mailingWebservice.getStatus(
                _session.getSessionId(), campaignId);
            if ("DONE".equals(campaignStatus)) {
                break;
            }
            if ("PAUSED".equals(campaignStatus) || "CANCELED".equals(
                campaignStatus))
            {
                throw new RuntimeException(
                    "Campaign is " + campaignStatus);
            }

            String campaignName = _mailingWebservice.getName(
                _session.getSessionId(), campaignId);
```

```
            // Log status for messages of campaign too.
            long[] messageIds =
                _splitMailingWebservice.getSplitChildIds(
                    _session.getSessionId(), campaignId);
            for (long messageId : messageIds) {
                String messageStatus = _mailingWebservice.getStatus(
                    _session.getSessionId(), campaignId);
                String messageName = _mailingWebservice.getName(
                    _session.getSessionId(), messageId);
            }
            sleepOneMinute();
        }
    }

    private void sleepOneMinute() throws InterruptedException {
        Thread.sleep(TimeUnit.MINUTES.toMillis(1));
    }
}
```

You can also show your campaign manager the available templates. The following example shows a query for the Smart Campaigns.

```
/**
 * Use case: Read available campaigns for closed loop scenario
 * This is a usability method. You can show available Smart Campaigns
 * to your campaign manager. Scenario for smart campaigns only.
 */
private class GetCampaignData extends UseCase {

    @Override
    void runExceptional() throws Exception {
        String campaignType = "regular";
        String campaignStatus = "ACTIVATION_REQUIRED";
        long[] campaignIds = _mailingWebservice.getIdsInStatus(
            _session.getSessionId(), campaignType, campaignStatus);
        for (long campaignId : campaignIds) {
            String campaignName = _mailingWebservice.getName(
                _session.getSessionId(), campaignId);
            String description = _mailingWebservice.getDescription(
                _session.getSessionId(), campaignId);
            long[] messageIds =
                _splitMailingWebservice.getSplitChildIds(
                    _session.getSessionId(), campaignId);
            for (long messageId : messageIds) {
                String messageName = _mailingWebservice.getName(
                    _session.getSessionId(), messageId);
                String messageDescription =
                    _mailingWebservice.getDescription(
                        _session.getSessionId(), messageId);
            }
        }
    }
}
```

Processing response data

Response data processing must be implemented when a campaign is being executed. Bounces, unsubscriptions and replies are part of these processes. You have the choice of using Episerver Campaign's features for

managing unsubscriptions or implementing proprietary processes in CRM. Processing unsubscriptions and replies is mandatory due to applicable rules on advertising consents and competition law.

Unsubscribing via Episerver Campaign

An unsubscribe link must be included in every email. If the link points to Episerver Campaign, the recipient is added to the unsubscribed list in Episerver Campaign, and receives no more email. The unsubscribed list in Episerver Campaign has precedence over additional mailings. This means that recipients do not receive emails even if they are included in a CRM selection which is transferred to Episerver Campaign. The unsubscription can only be revoked using a new double opt-in process.

If the recipient has unsubscribed using the Episerver Campaign processes, the unsubscription is sent back to the CRM using the closed-loop interface. The CRM system must process the unsubscriptions obtained in this manner and save them in applicable entities. The transferred selections may not contain any recipients that have effectively revoked their advertising consent.

If an unsubscription is performed via another method, such as through the customer center in a shop system, then these unsubscriptions do not necessarily have to be sent to Episerver Campaign, provided that the unsubscriptions are actively saved in the referentially-leading system. In any case, it must be ensured that active unsubscriptions are not included in selections and campaigns sent to Episerver Campaign.

Unsubscribing via third-party systems

If you use your own unsubscription links, Episerver Campaign will not receive any information about unsubscriptions. Forwarding is not possible. In this case, the systemic responsibility for properly using advertising consents lies fully with CRM.

Reply emails

Recipients can answer emails and express additional requests such as an unsubscription. Either of these returned emails are processed in the Episerver Campaign's user interface, or forwarded to the inbox of your choice, as configured in Episerver Campaign.

Data formats

Each field in the recipient list can be filled via the closed-loop interface or HTTP API. The data format in the transferred files can be mapped to fields in the recipient list, irrespective of the set-up of the closed-loop interface. Therefore, the format of the recipient list does not necessarily match the one that the closed-loop interface expects. Contact customer support for exact data formats.

Conversely, the HTTP API can directly fill fields in the recipient list. The names of the HTTP parameters here must directly match the ones stated in the recipient list. See HTTP API.

Event emails

Event emails are typically triggered by a certain event. For instance, this can be a registration, or an order placement or cancellation. This type of email can ideally be sent over the HTTP API. Here, you can save a decided recipient list suitable for sending these special mailings. You can link as many mailings as you want to this recipient list and send result-based emails individually. This type of integration is also suitable for Marketing Automation campaigns triggered based on events and points in time.

Implementation example

The following code block shows an example of how response data can be retrieved.

```java
/**
 * Use case: Get response data
 * This use case shows how to receive and process reponse data.
 * Response data are fetched within a certain interval, usually
 * 1-4 h, and processed according to your system needs.
*/
private class GetResponseData extends UseCase {

    @Override
    void runExceptional() throws Exception {
        long until = _closedLoopWebservice.getCurrentTime(
            _session.getSessionId());
        int numberOfRows = 1000;
        int startRow = 0;

        String[][] recipients;
        do {
            recipients = _closedLoopWebservice.getRecipients(
                _session.getSessionId(),
                _since, until, startRow, numberOfRows);
            processData(recipients);
            startRow += numberOfRows;
        } while (recipients.length >= numberOfRows);

        startRow = 0;
        String[][] clicks;
        do {
            clicks = _closedLoopWebservice.getClicks(
                _session.getSessionId(),
                _since, until, startRow, numberOfRows);
            processData(clicks);
            startRow += numberOfRows;
        } while (clicks.length >= numberOfRows);

        startRow = 0;
        String[][] opens;
        do {
            opens = _closedLoopWebservice.getOpens(
                _session.getSessionId(),
                _since, until, startRow, numberOfRows);
            processData(opens);
            startRow += numberOfRows;
        } while (opens.length >= numberOfRows);

        startRow = 0;
        String[][] links;
```

```
        do {
            links = _closedLoopWebservice.getLinks(
                _session.getSessionId(),
                _since, until, startRow, numberOfRows);
            processData(links);
            startRow += numberOfRows;
        } while (links.length >= numberOfRows);

        startRow = 0;
        String[][] responses;
        do {
            responses = _closedLoopWebservice.getResponses(
                _session.getSessionId(),
                _since, until, startRow, numberOfRows);
            processData(responses);
            startRow += numberOfRows;
        } while (responses.length >= numberOfRows);

        startRow = 0;
        String[][] unsubscribes;
        do {
            unsubscribes = _closedLoopWebservice.getUnsubscribes(
                _session.getSessionId(),
                _since, until, startRow, numberOfRows);
            processData(unsubscribes);
            startRow += numberOfRows;
        } while (unsubscribes.length >= numberOfRows);

        startRow = 0;
        String[][] mailingUnsubscribes;
        do {
            mailingUnsubscribes =
                _closedLoopWebservice.getMailingUnsubscribes(
                    _session.getSessionId(),
                    _since, until, startRow, numberOfRows);
            processData(mailingUnsubscribes);
            startRow += numberOfRows;
        } while (mailingUnsubscribes.length >= numberOfRows);

        _since = until;
    }

    // customize this method according to your needs. This
    // includes creating campign reactions or upsert subscription-
    // or bounce status to your entities.
    private void processData(String[][] values) {
        if (values.length == 0) {
            // process no values here
        } else {
            for (String[] click : values) {
                // process your business logic/campaign reactions here
            }
        }
    }
}
```

The following code demonstrates how a recipient's bounce status can be reset.

```
/**
 * Use case: Reset bounce status
 * This is an example of how to reset the bounce status
```

```
 * of a recipient.
 */
private class ResetBounceStatus extends UseCase {

    @Override
    void runExceptional() throws Exception {
        resetBounceCounter(EMAIL_ADDRESS);
    }

    private void resetBounceCounter(String emailAdress)
        throws WebserviceException {
        _responseWebservice.resetBounceCounter(
            _session.getSessionId(), emailAdress);
    }
}
```

Managing opt-ins with CRM system integrations

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

Episerver lets you display multi-channel advertising consents, which can also be synchronized with different fields in the CRM (customer relationship management) system provided it has this feature. This lets a contact or a lead issue multiple different advertising consents for different newsletters, to get an overview of consents for channels in your CRM.

How it works

You can connect multiple clients in Episerver Campaign from your CRM. The advertising consents in CRM are already saved or you already performed the necessary adjustments for them. In either case, the CRM provides a full view of recipients, and changes to the advertising consents from third-party systems carry over.

For example, the advertising consents can be represented by Boolean fields or a check box at the contact, lead, or account entities. They can refer to a channel (email, SMS) and/or a certain newsletter. The CRM does not have to make any content-related distinctions, and can immediately handle the consents. The types of consents (contact, lead, account) must be the same for relevant entities (Boolean value check box or tick box). The types of consents required depend on your campaign plans and data structure. You are responsible for depicting it in your CRM.

Events such as unsubscriptions or bounces relate to a specific advertising consent. For the systems involved to be consistently aware of the consent and related medium, you must save the appropriate information in CRM. The easiest way is using a table with the advertising consents you are using. In this table, each row represents an advertising consent where you can assign the consent using a unique identification. If you need to process an unsubscription from Episerver Campaign, the transferred identification is used to determine the affected

advertising consent. You can also delete advertising consents for the appropriate media type for a contact or lead in case of a hard bounce. An email address bouncing has nothing to do with a specific advertising consent.

Data structure

This list shows a data structure for advertising consents:

- **opt-in-ID**. Generic field for a unique ID issued by CRM (not visible, quasi an AUTO-INCREMENT field, sequence or GUID).
- **description**. Unique name displayed to the user and used for identification (visible).
- **media-type**. The user can select email, email and SMS in this drop-down list (visible).
- **broadmail-client-id**. Reference to a client-ID in Episerver Campaign configured in CRM (visible).
- **reference-bounce**. Reference to a bounce field (visible). If empty, then no bounce is managed for the channel. Mandatory for email channel.
- **reference-opt-in**. Reference to an advertising consent in the contact, lead, or account entity. You can save the contact or lead field that needs to be administrated.

Instead of saving tables and references, you can archive the logic in code or XML files for simple applications. The data model in this example shows what advertising consents may look like when linking advertising consent to a client in Episerver Campaign.

CRM-ID	Name	Reference field	Type	Client	Reference bounces
AS1034576120-4	Fan news-letter	crm.custom.lead.fan-opt-in	Em-ail	10344523412-435	crm.custom.lead.fan-bounces
FG1045714561-2104	Premiu-m fur-niture	crm.-cus-tom.lead.premium-opt-in	Em-ail	14351098251-023	crm.-cus-tom.lead.premium-bounces
SMS100167842-35	SMS ticker	crm.custom.lead.sms-ticker-opt-in	SM-S	14561234610-25	crm.custom.lead.sms-ticker-bounces

Controlling campaigns and transferring data

If a campaign needs to be sent from CRM, select the advertising consent and the mailing template. You can determine the client to use in Episerver Campaign by using the data model for advertising consents.

The technical connection of the closed-loop services must be expanded by additional fields in this scenario. The following additional parameters are transferred to Episerver Campaign, in addition to the data of the determined recipient list: **consent description**, **opt-in ID** and **media type**. The opt-in ID and the media type are sent back to CRM as a component of the closed-loop circle for bounces, unsubscriptions, and so on. When an unsubscription or bounce occurs, CRM enters the cancellation of the advertising consent or the bounce into the appropriate entity (i. e. lead, contact) accordingly. Using the transferred parameters, you can tell which contacts/leads/accounts and which advertising consent are affected. You also can carry out additional actions through the **media-type** field, as described above.

Changing bounce or subscription status

Episerver Campaign blocks an email address from sending more messages when there are too many bounces. You can change the *bounce status* of a recipient in CRM, for example when the recipient has ensured that the error would be resolved after a temporary problem. The usual design patterns for implementing this functionality as part of CRM are save interceptors or observers with which you can respond to data changes. This is only an example, if required the CRM will use its own design pattern for this case.

The bounce counter is set per client in Episerver Campaign. Therefore, unlock clients in which the bounce counter was exceeded. You must save the appropriate information to CRM or, alternatively, reset the bounce counter in configured clients. To do this, use the resetBounceCounter method from the **responseWebservice**, carefully following the instructions in the documentation on changing the media type.

To set the *subscription status*, use the advertising consent to determine the correct client, then trigger a new DOI process for the subscription in question. Unless the unsubscriptions are also processed in Episerver Campaign, you should manage the DOI process using Episerver Campaign also. In this case, an unsubscription is redelivered after a successful DOI.

Synchronizing recipient data with CRM systems

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

Data such as reports, marketing lists, or comparable filters in recipient lists, contained in CRM (customer relationship management) , should be individually copied into Episerver Campaign, for example with a daily transfer.

To manage campaigns in Episerver Campaign, copy the recipient data from your CRM into the regular recipient lists. Depending on requirements and the CRM data structure, you can define fixed export formats. CRM users can filter contacts, leads and/or accounts through reports or marketing lists, which are automated and regularly transferred to Episerver Campaign. Using a CMS database, you can fill recipient lists in clients in Episerver Campaign, and use the data for Smart Campaigns and other Episerver Campaign features.

Implementation

- Relate the selection of recipients to precisely one advertising consent.
- Do not mix advertising consents.
- Specify the desired fields with customer support beforehand.
- Transfer technical fields: opt-in-id, description, media-type, entity-type (contact, lead, account, ...), entity-id (ID of the contact/lead/account from CRM).

Incremental export processes have proved less robust. You should clear the list daily using the clear method from RecipientWebservice, and fully re-fill it using the addAll3 method from RecipientWebservice.

Unsubscriptions and bounces from Episerver are imported into CRM before the data transfer using two CSV files (bounces and unsubscriptions), requested by Episerver Campaign via SOAP. This prevents unsubscribed and bounced out subscribers from being re-added to the recipient list during the copy process.

Response data

Response data is asynchronously prepared through regular, ongoing jobs (once a day by default). Shorter intervals can also be configured depending on your requirements. The lifetime of the response data is set between 14 and 30 days. The recipient list is recycled after a certain period of time when using the closed-loop interface. Response records are still available, but can no longer be clearly categorized.

If recipient data from synchronized recipient lists is used for campaigns in Episerver Campaign, then the respective campaign context is unknown in CRM and it does not make sense to make information such as opens or clicks available to CRM in the feedback channel. This data can be made available if the CRM can process it.

In contrast, bounces and unsubscriptions refer to entities such as contact, lead, or account in CRM. This data is made available and needs to be processed by CRM. The applicable bounce status or the advertising consent must be then set to the applicable entities.

If a response data flow is configured, then the response data is exported for a client's mailings, which you can import into CRM. It does not matter whether an email is sent via the HTTP API, as a campaign email via closed-loop, or as a standalone mailing in Episerver Campaign. The opens and clicks are ignored for campaign responses that did not have any campaign in the CRM.

Concluding information

- Blacklists use the email address as a primary criterion. If an email address is entered into the blacklist, then no emails are sent to the address. You can manage blacklists using Episerver Campaign's front-end.
- All features can be used in parallel in Episerver Campaign. Note the limitations for the recipient lists.
- Use UTF-8 as data format.
- Use unique file names, including when delivering campaign data.
- If you use the file API, use the header rows to make troubleshooting easier.

Salesforce add-on

> Note: This topic is for administrators and developers with administration access rights in Episerver Campaign.

With the Salesforce add-on, you can send mailings from Salesforce, and use contact and lead data to automatically personalize the content. You can transfer customer-specific fields (up to the third level) to recipient lists, and personalize salutations for leads and contact owners. After the mailing is sent, you receive response data such as openings, clicks, outbounces, direct replies and unsubscriptions for each recipient.

Features and supported versions

The following features are supported for Enterprise, Unlimited, and Performance Editions:

- Campaign management.
- Transfer of recipient data.
- Transfer of returned emails and response data: Openings, clicks, direct replies.
- Synchronization of unsubscriptions and bounces.
- Support for contacts, leads, and personal accounts.
- Administration of advertising permissions for the marketing channels of email and text message.
- Import of advertising permissions (double opt-in) submitted via Episerver Campaign.
- Synchronization of contacts, leads, and personal accounts with Episerver Campaign recipient lists.

Setup

To set up the Salesforce add-on, contact customer support. Provide Episerver with the following information:

- Your SOAP API user name in Episerver Campaign. If you do not have a SOAP API user account, customer support can create this. Use a separate email address that is not used for logging into Episerver Campaign.
- Any additional CRM data in addition to the standard data you want to be transferred to the Episerver Campaign recipient list. See Configuring the integration.
- The client IDs for the integration. To see the client ID, go to start menu > **Administration** > **API overview** > **SOAP API**.

Installation

The Salesforce add-on is delivered as an **Unmanaged Package**. Install this package independently in your Salesforce Org according to the standard Salesforce approach. If you need help with the installation, contact customer support. After the installation is complete, you can access the Salesforce add-on features via the following tabs:

1. **Mandators (Episerver Campaign)**: Store the access data for your Episerver Campaign clients in this tab.
2. **Administration (Episerver Campaign)**: This tab contains options for configuring, starting, and stopping the data exchange between Episerver Campaign and Salesforce.
3. **Opt-Ins (Episerver Campaign)**: Configure and manage the advertising permissions for your leads, contacts, and personal accounts in this tab.
4. **DOI Stage Objects (Episerver Campaign)**: In this tab, manually assign double opt-in advertising permissions (see Manual assignment of double opt-ins) that cannot be automatically linked to a lead, contact, or personal account. This is the case if a data set – for example an email address – exists multiple times in Salesforce and is therefore not unambiguous.
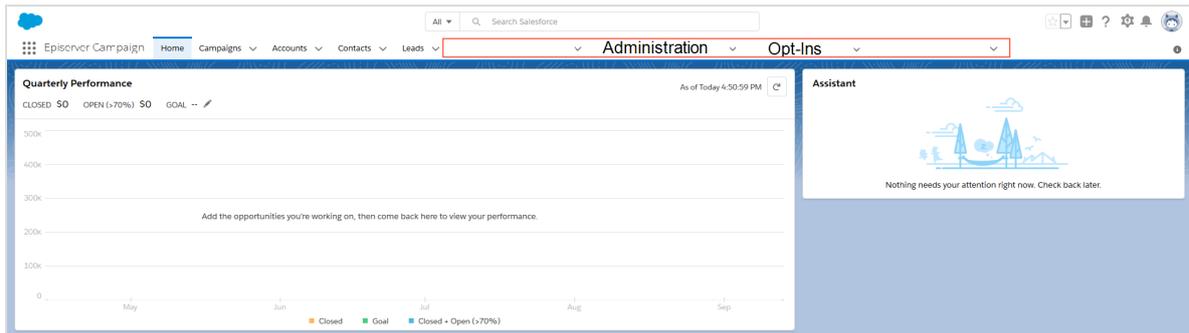
Configuring advertising permissions

Note: This topic is for administrators and developers with administration access rights in Episerver Campaign.

The Salesforce add-on supports the administration of advertising permissions for the marketing channels of email and text message in your Salesforce Org. It is also possible to import double opt-ins from Episerver Campaign.

The configuration of advertising permissions consists of the following steps:

1. Create Boolean reference fields (true/false) for the marketing channels you use (email, text message) for your leads, contacts, and personal account. The reference fields will later be displayed in the personal information of your leads, contacts, and personal accounts as check boxes (**Advertising permission present** or **Advertising permission not present**).
2. In Salesforce, configure your Episerver Campaign clients.
3. Assign the created reference fields to an advertising permission with the corresponding marketing channel.
4. Enable automatic import to import completed double opt-ins from Episerver Campaign.
5. Alternatively, you can assign double opt-ins manually.

Creating reference fields

1. Go to the **Setup** area in Salesforce.
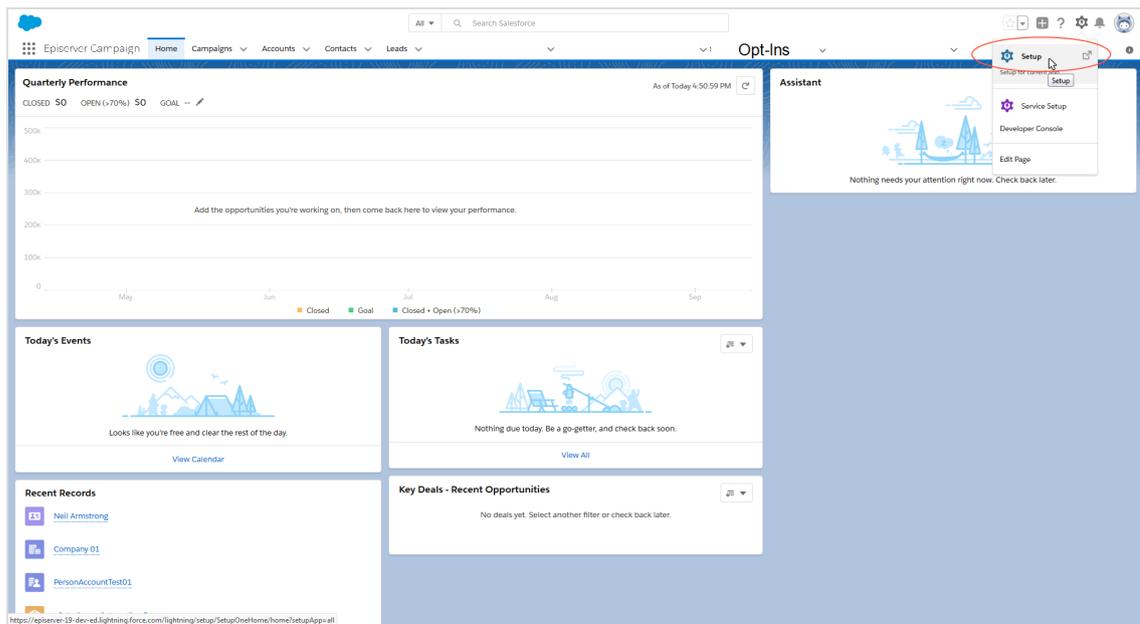
2. In the left menu bar, click **Objects and Fields** > **Object Manager**.
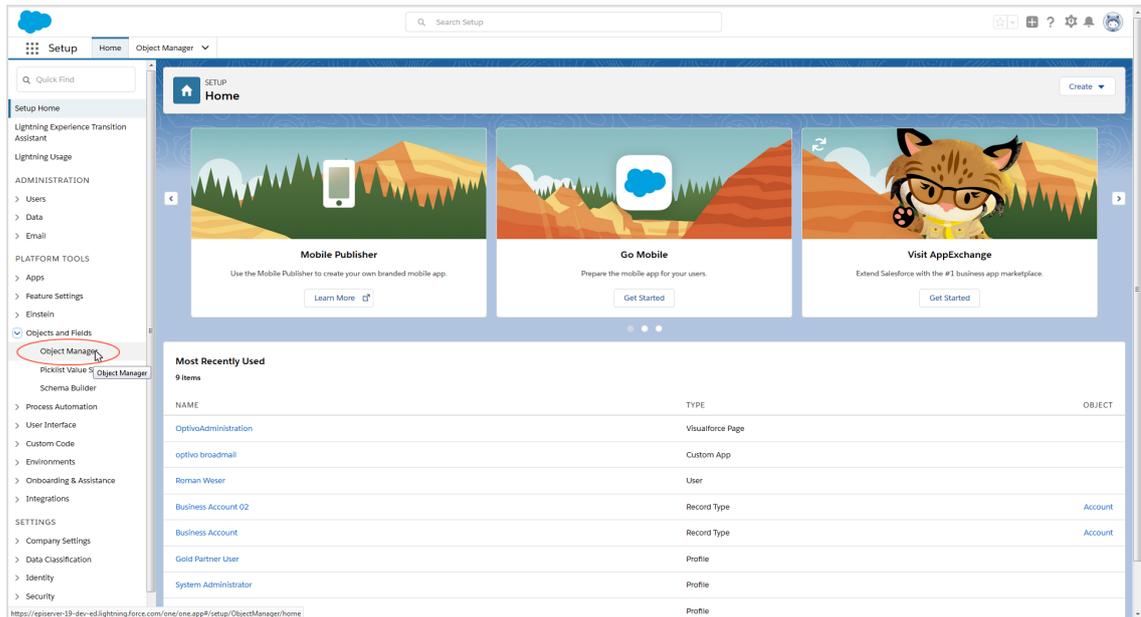
3. In the **Object Manager** window, select the entity that you want to create a new reference field for, such as **Contact**.
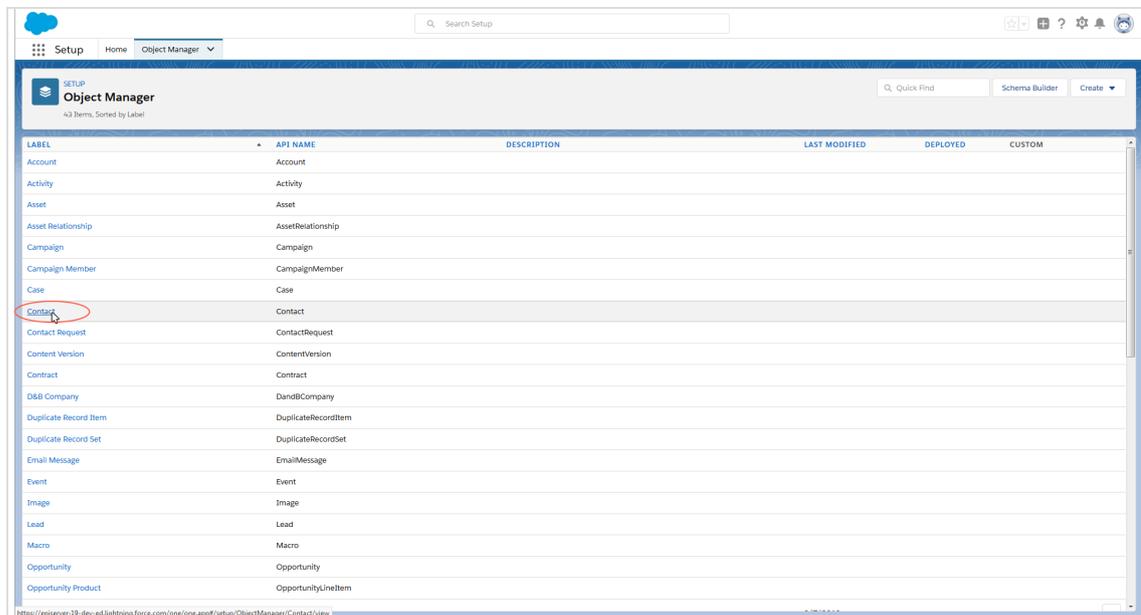
4. In the **Object Manager** window of the selected entity, click **Fields & Relationships**.
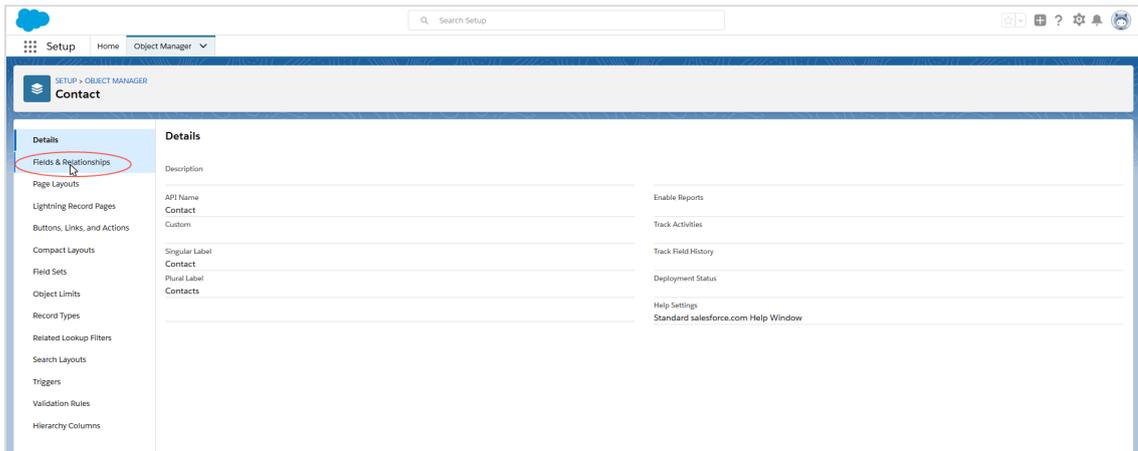
5. Click **New**.
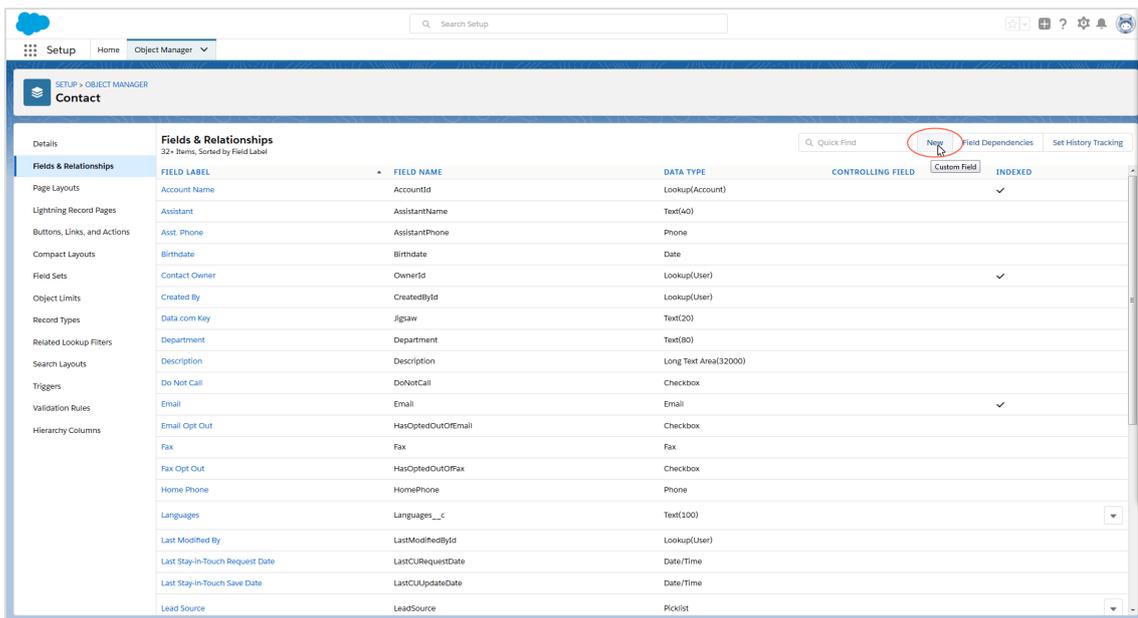
6. In the **New Custom field** window, select the **Checkbox** option under **Data Type**.
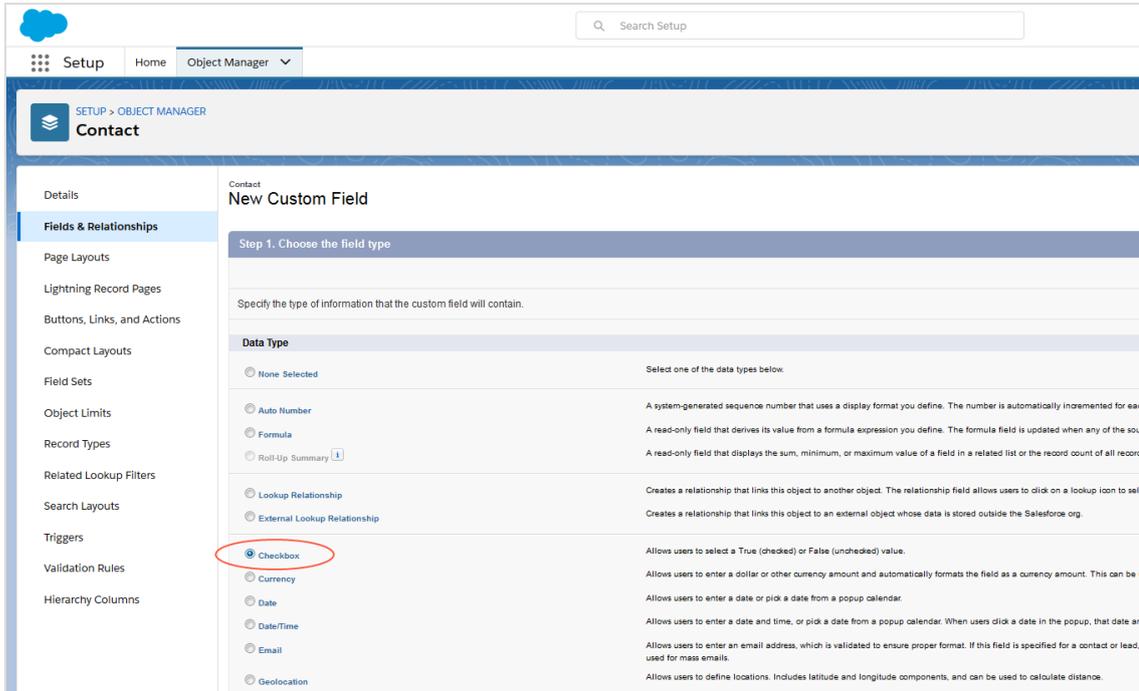
7. Click **Next**.
8. Enter a name for the new field in the **Field Label** field, for example *Newsletter*.
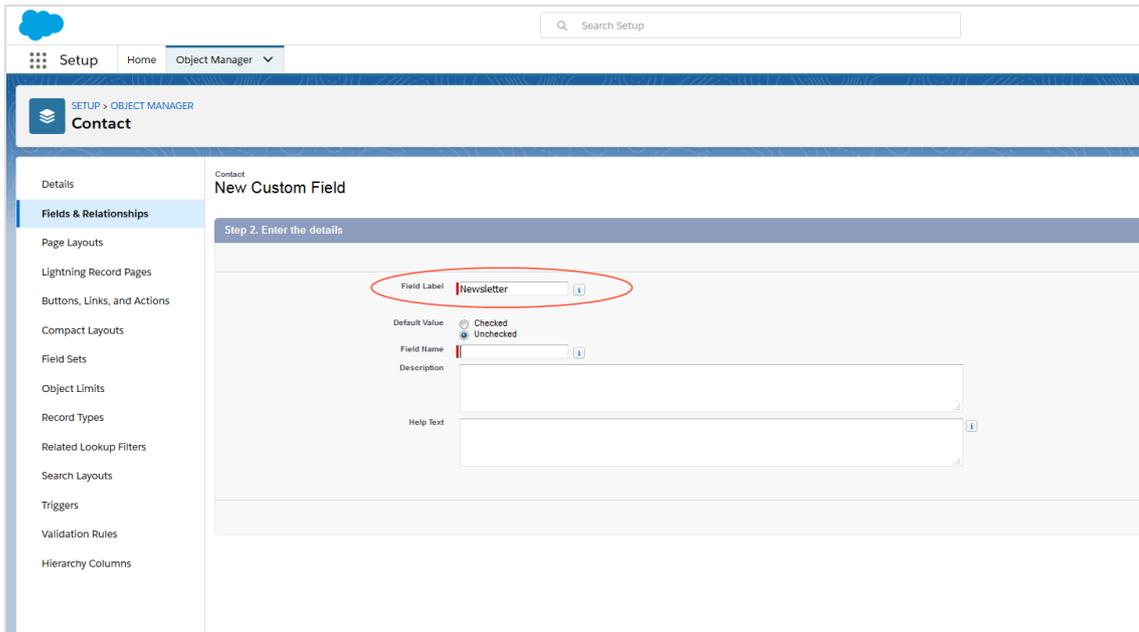
9. Under **Default value**, leave the option on **Unchecked**.

10. The selected field name will automatically be added in the **Field name** field. Optionally, enter another field name.

11. Optional: Enter a description in the **Description** field.

12. Optional: Enter a help text in the **Help Text** field.

13. Click **Next**.

14. Configure the field level security according to your requirements.
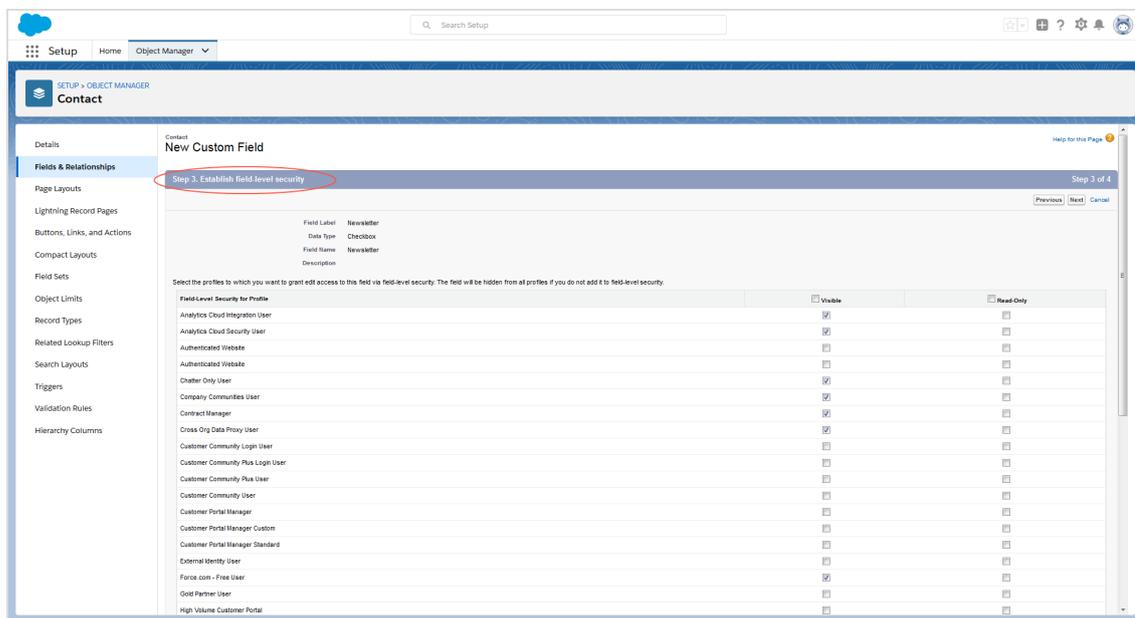
15. Click **Next**.

16. Add the page layouts according to your requirements or remove unneeded page layouts.
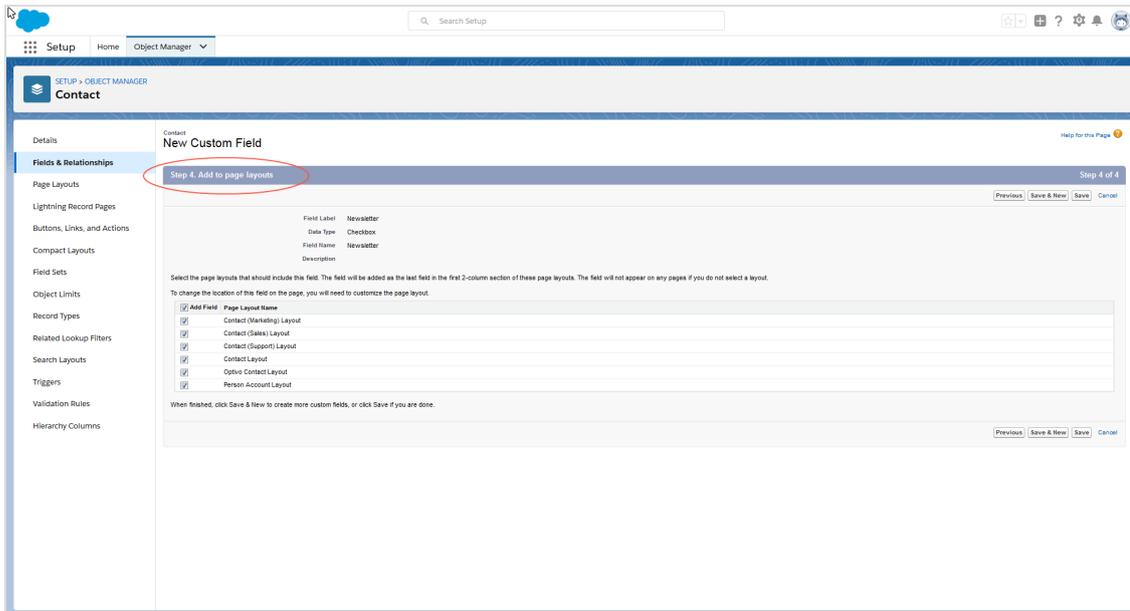
17. Click **Save**.

Repeat the steps for the other marketing channels you use and for the corresponding entities (leads, contacts, personal accounts).

> **Tip:** Create identical fields for leads, contacts, and personal accounts. In this way, advertising permissions will be automatically transferred if a lead becomes a contact, for example. If you create different fields, you need to use **Rules** to transfer the advertising permission (such as from a lead that has become a contact).

Storing client IDs and SOAP API user data

> **Note:** Contact customer support if you do not have a SOAP API user account for the relevant client.

1. Log in to Salesforce CRM.

2. Open the **Mandators (Episerver Campaign)** tab.
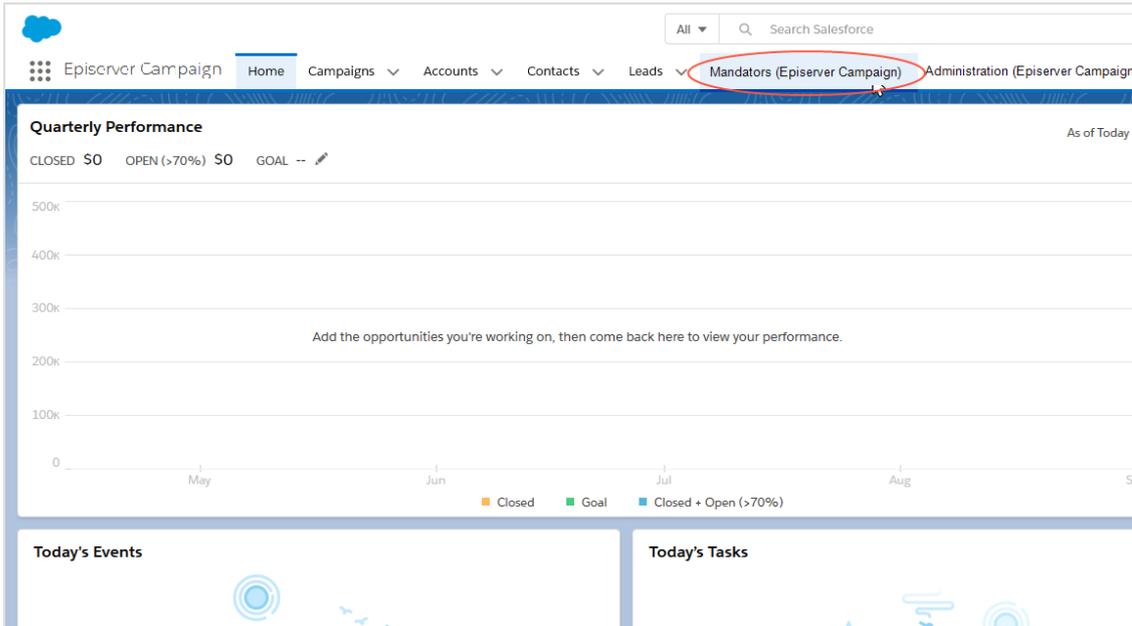
3. Click **New** to create an Episerver Campaign client in Salesforce.
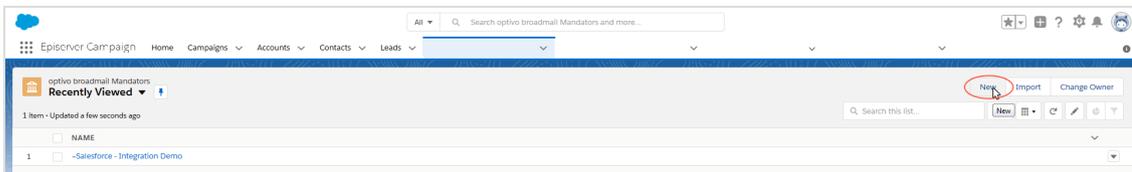
> **Tip:** If you would like to change the settings of a previously created client, click the respective client and then **Edit**. The list views in Salesforce may hide clients. If necessary, click **All** in the list views.

4. In the Episerver Campaign **Client** window, specify the following fields:

   a. **Name**. Name of the client (as it should be displayed in Salesforce). You can chose the name freely. For greater clarity, use the same name as in Episerver Campaign.

   b. **Client ID**. Client ID. To see the client ID, go to start menu > **Administration** > API overview > SOAP API.

   c. **API User**. Your SOAP API user name.

   d. **Password**. Your SOAP API password.

   e. **Active**. Select the check box.
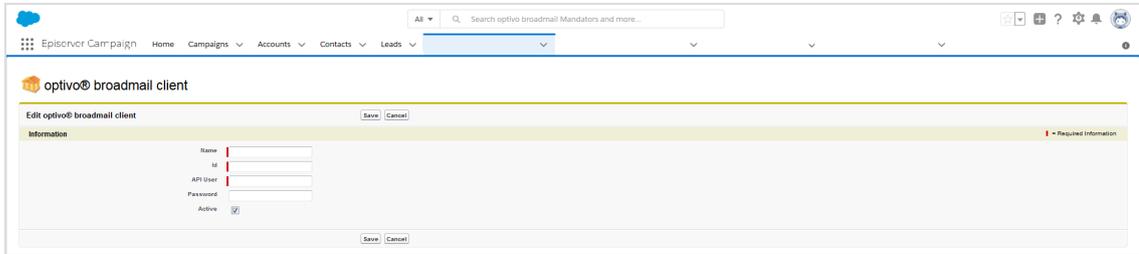
5. Click **Save**.

Repeat these steps for additional clients to connect to Salesforce CRM.

Assigning reference fields

1. Open the **Opt-Ins (Episerver Campaign)** tab.
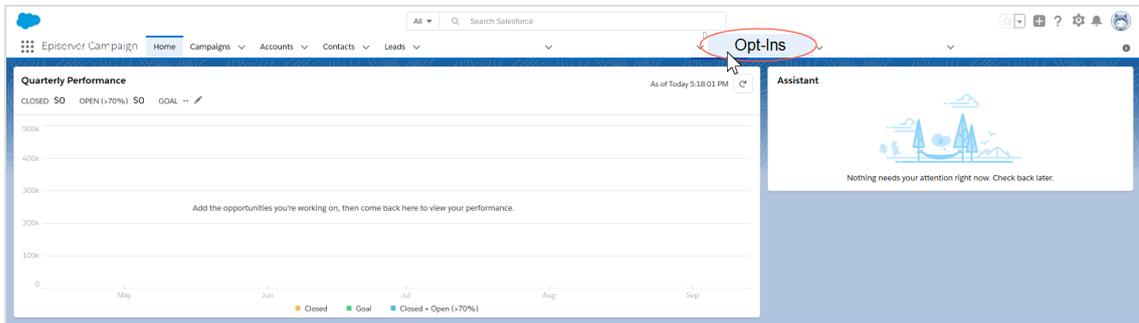
2. In the **Opt-Ins (Episerver Campaign)** window, click **New**.
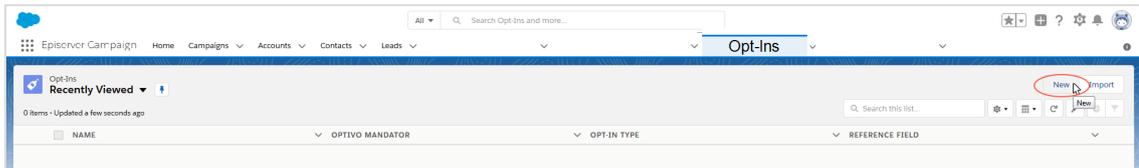
3. In the **Configure advertising permission** window, specify the following fields:
   a. **Name**. Name for the advertising permission (for example *Product newsletter*).
   b. **Mandator**. Episerver Campaign client to which the advertising permission is to be assigned.
   c. **Opt-In Type**. In the drop-down list, select the marketing channel for which the advertising permission applies (for example *Email*).
   d. **Reference field**. In the drop-down list, select the reference field that you want to assign the advertising permission to (the Boolean field that you have created the advertising permission for, see [Creating reference fields](#)).

4. Click **Save**.

Importing opt-ins from Episerver Campaign

1. Select the check box **Episerver Campaign Synchronization**.

2. In the **DOI list Id** field, enter the ID of the recipient list containing the double opt-ins. To see the recipient list ID, go to start menu > **Administration** > **API overview** > **Recipient lists**.

3. In the **DOI process Id** field, enter the ID of the opt-in process. To see the opt-in process ID, go to start menu > **Administration** > **API overview** > **Opt-in processes**.
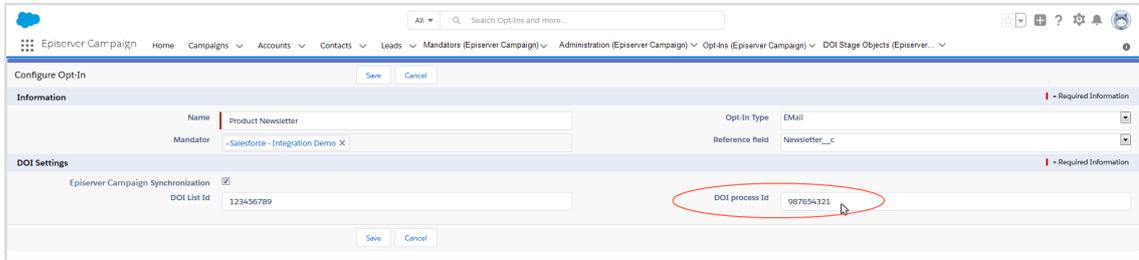
4. Click **Save**.

Manual assignment of double opt-ins

If a double opt-in advertising permission via Episerver Campaign has not been assigned – because it has multiple contacts or leads for the same email address, for example – you need to assign it manually. Perform the following steps:

1. Open the **DOI Stage Objects (Episerver Campaign)** tab.
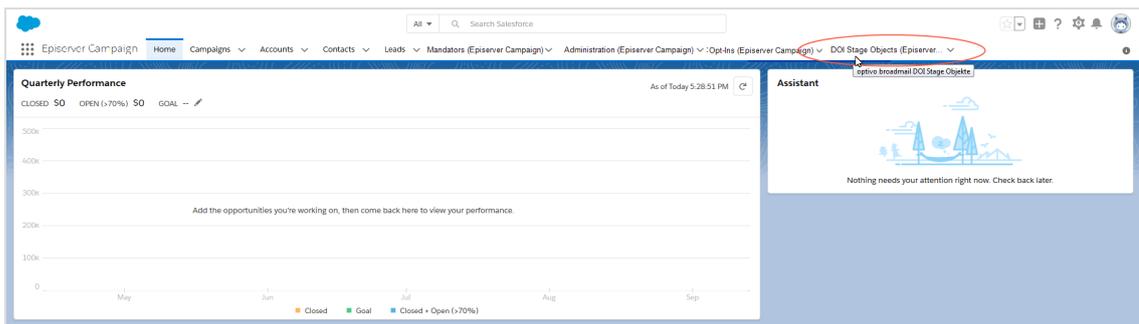
The **DOI Stage Objects (Episerver Campaign)** window shows you the advertising permissions that were unable to be assigned automatically.
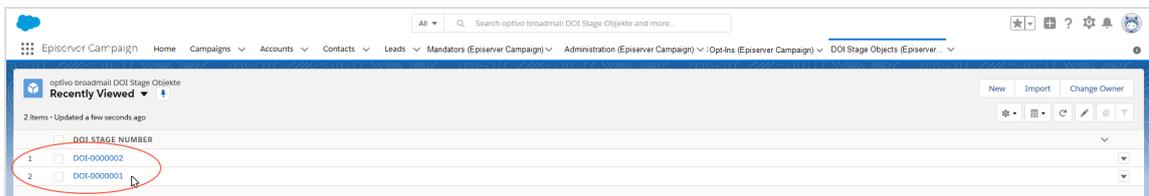
2. To see detailed information about an advertising permission, click the unassigned advertising permission.

3. To assign the advertising permission, click the downward-pointing triangle on the upper right.
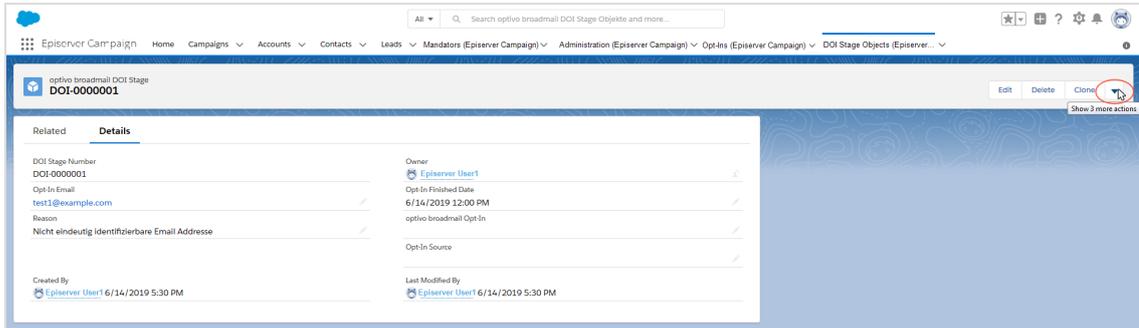
4. Select **Assign DOI manually** in the drop-down list.
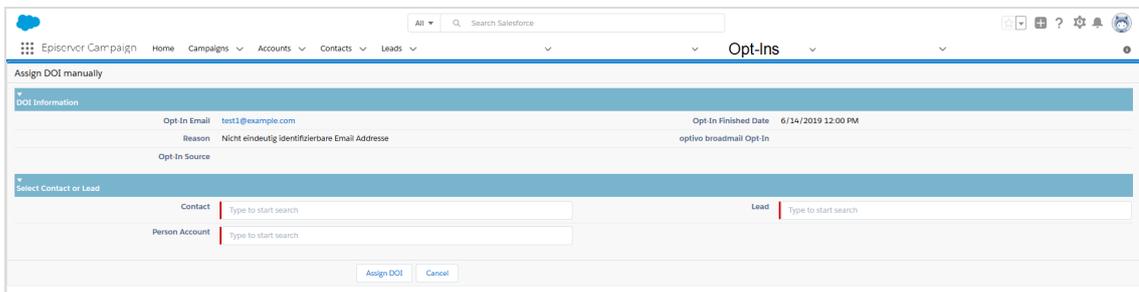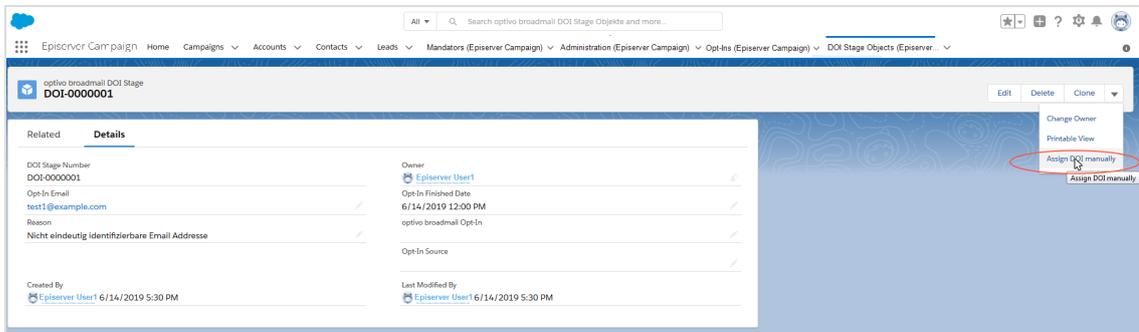
5. Under **Select Contact or Lead**, search for the person to whom you want to assign the double opt-in advertising permission.
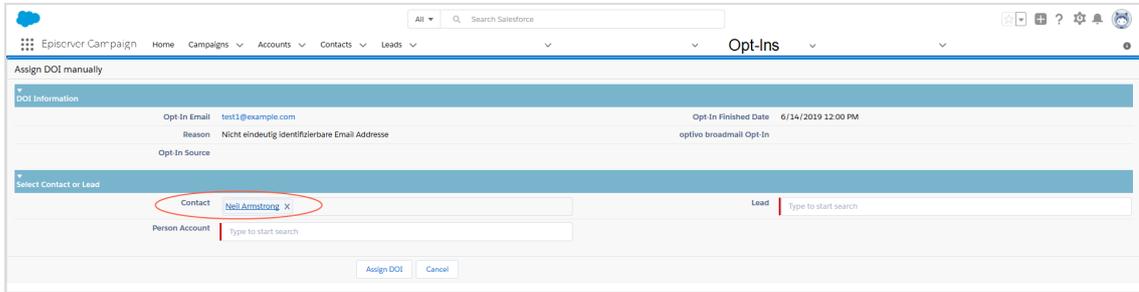
6. Click **Assign DOI**.
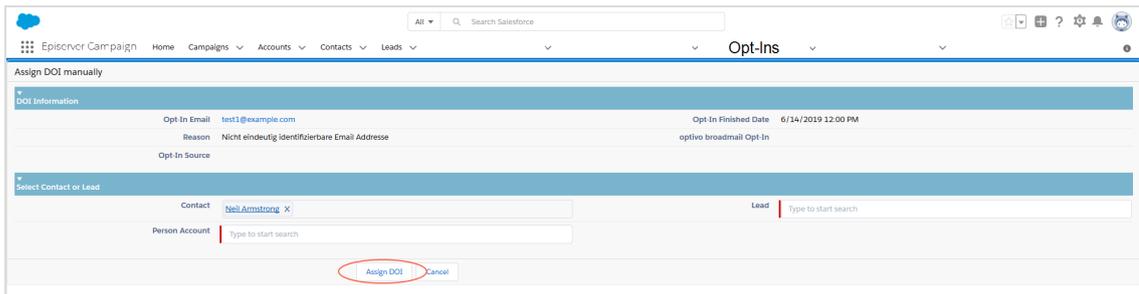
Repeat the steps for every advertising permission that has not been assigned.

> **Tip:** Check regularly whether marketing permissions are unable to be assigned and then assign them manually. This keeps your database updated at all times.

Configuring data fields

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

Transferring default data fields

You can use contact data of leads or contacts to personalize mailings and for target group segmentation in Episerver Campaign. See [Field functions](#) and [Target groups](#).

By default, the following data is sent from Salesforce to Episerver Campaign:

Field name	Data type	Description
email	String	Email address of the contact or lead
salesforceid	String	Unique ID for the contact/lead in Salesforce
sfcampaignid	String	Unique ID of the Salesforce campaign
entity_type	String	Contains the type of the **Lead**, **Contact**, or **Personal Account** type
salutation	String	Recipient's salutation
firstname	String	Recipient's first name
lastname	String	Recipient's last name
title	String	Recipient's title (for example Dr., Prof. and so on)
mobilephone	String	Recipient's mobile telephone number
fax	String	Recipient's fax number
street	String	Recipient's street and house number from the **Lead** type
postalcode	String	Recipient's postal code from the **Lead** type
city	String	Recipient's place of residence from the **Lead** type
state	String	Recipient's state from the **Lead** type
country	String	Recipient's country from the **Lead** type
birthdate	Date	Recipient's date of birth from the **Contact** type
mailingstreet	String	Recipient's street and house number from the **Contact** type

Field name	Data type	Description
mailingpostalcode	String	Recipient's postal code from the **Contact** type
mailingcity	String	Recipient's city from the **Contact** type
mailingstate	String	Recipient's state from the **Contact** type
mailingcountry	String	Recipient's country from the **Contact** type

Transferring additional fields

In addition to the standard setup, you can transfer other Salesforce data fields to Episerver Campaign. The Salesforce add-on can directly access linked data sets (Salesforce objects up to the third level). For example, the contact person who manages the contact or lead in your organization, or the name of the department head, in addition to contact or lead data and attributes.

This lets you, for example, customize greetings, so that a contact or lead is greeted by the member in your organization that manages the lead or contact.

To set up the transfer, first configure the additional data fields in Salesforce. Then, contact Episerver **customer support** to request the addition of these fields to your recipient lists.

Configuring additional data fields

1. Log in to Salesforce CRM.
2. Open the **Administration (Episerver Campaign)** tab.
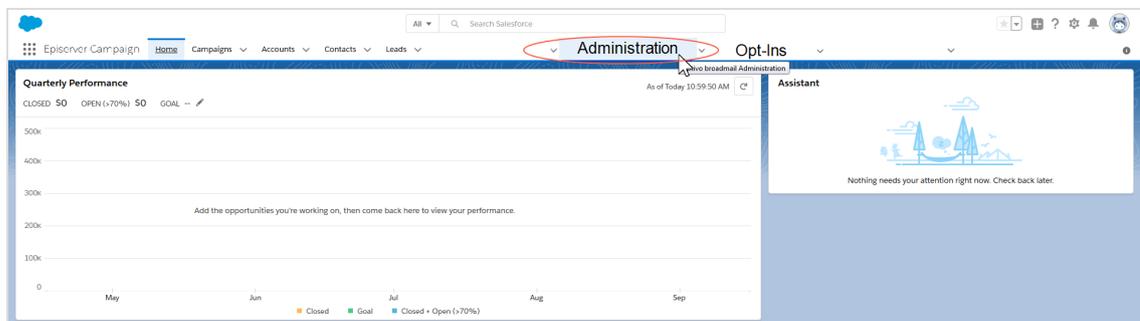
   The **Administration (Episerver Campaign)** window opens. In the fields area, you can find the data fields that can be transferred to Episerver Campaign, separated by leads, contacts, and personal accounts.
3. When data synchronization is enabled, you can disable data synchronization by clicking **Stop scheduler** next to **Scheduler control**.
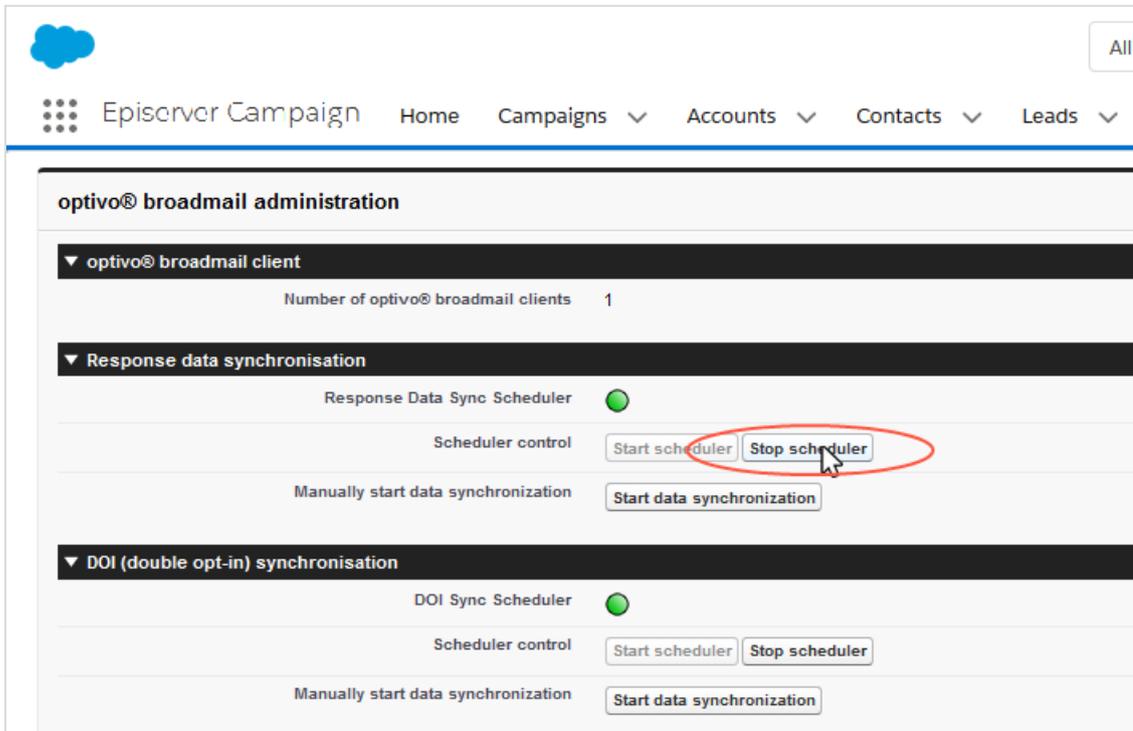
4. In the lists on the left under **Lead**, **Contact**, or **Personal Account**, select the data field that you want to transfer to Episerver Campaign. To select multiple data fields at the same time, hold down the **CTRL** key on your keyboard.
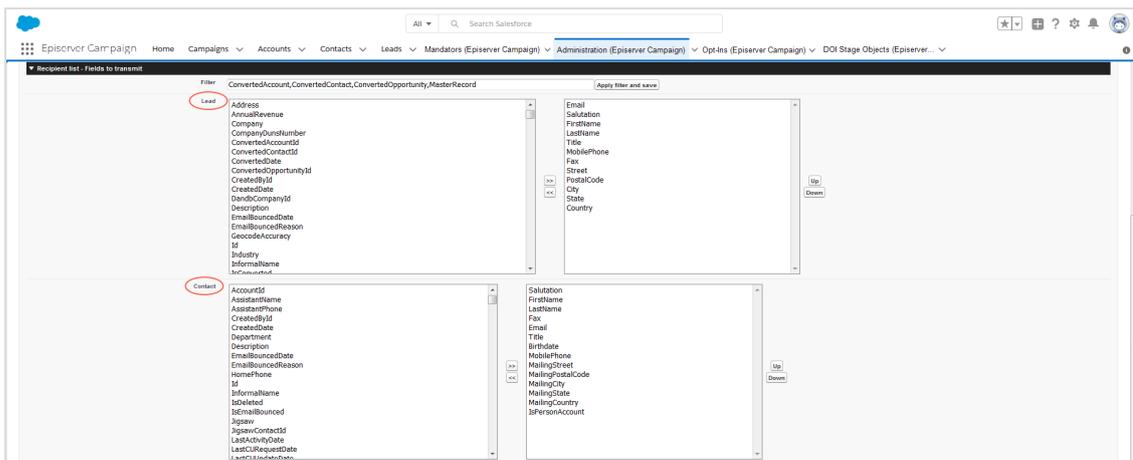
> **Note:** The lists on the left contain Salesforce objects that can be transferred.
> Lists on the right contain objects that are currently transferred.
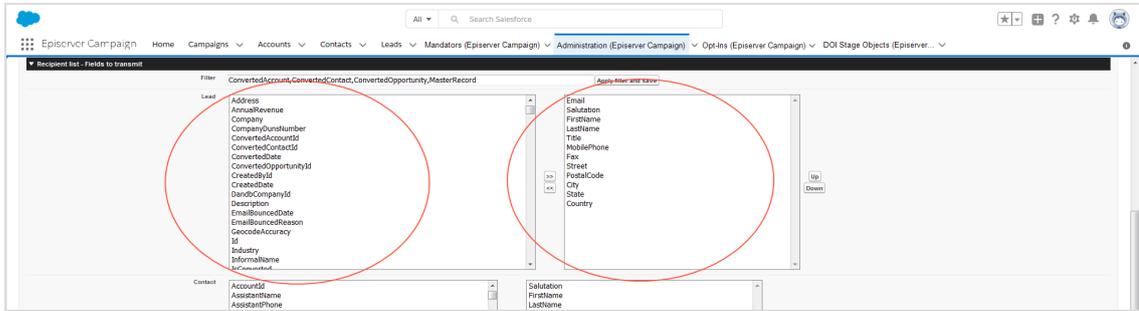
5. To add one or more data fields, click the right arrows **>>**.
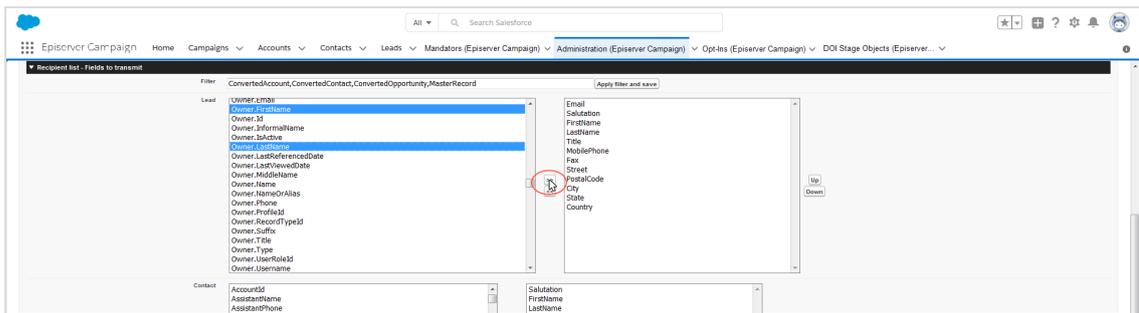
6. Optional: Select a data field and click **Up** or **Down** to change the order in which the data fields are transferred.
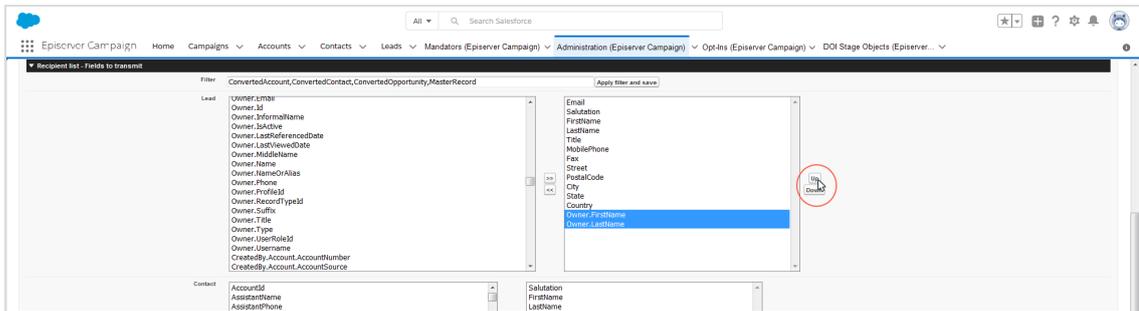
7. Click **Save**.
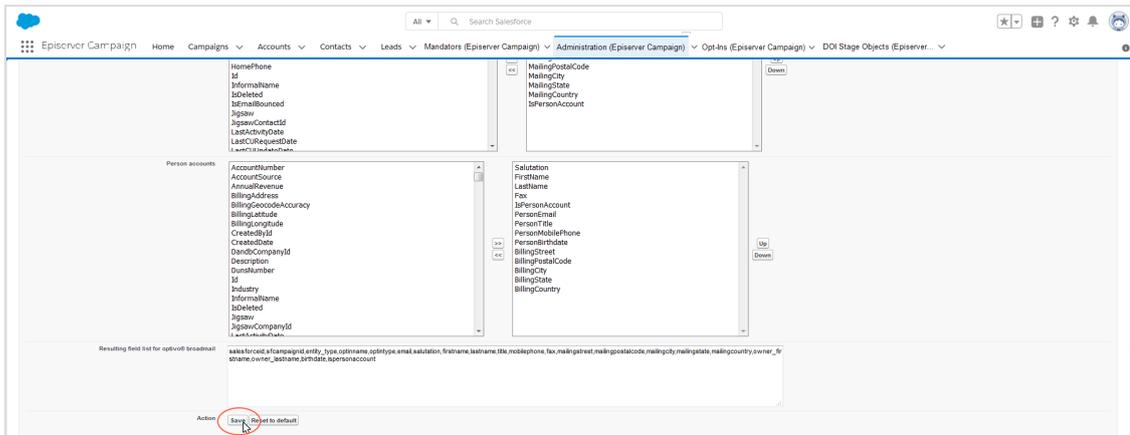
Under **Resulting field list for Episerver Campaign**, the list of data fields that are to be transferred are expanded by the newly-added data fields. If you want to discard your changes and return to the default settings, click **Reset to default**.
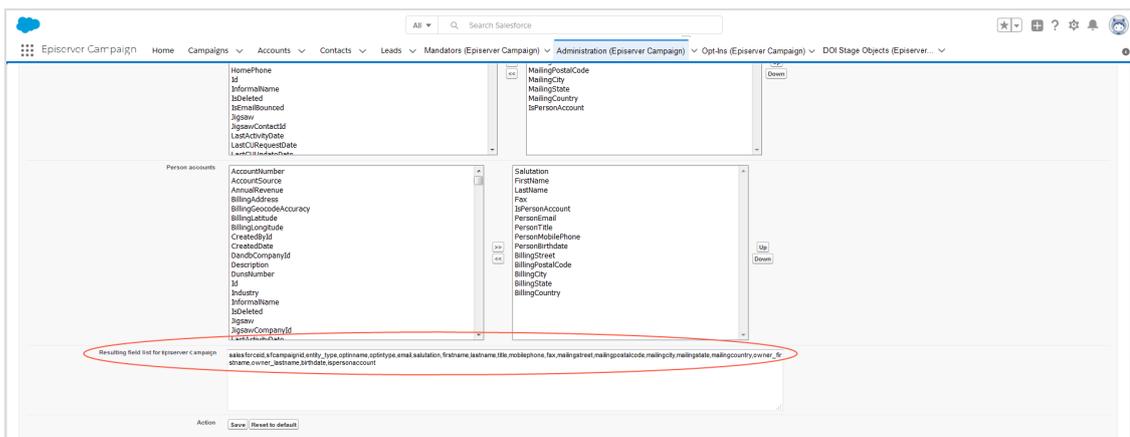
> **Tip:** Keep this window open, as it is needed when Requesting additional fields to be added to recipient lists.

Since all Salesforce objects cannot be displayed in the **Lead**, **Contact** and **Personal Accounts** lists at the same time, you can use a filter to hide data fields or data field groups to display other Salesforce objects. If data fields that you want to transfer are missing from the list, you can hide the data field group **Owner**:

1. Be sure to save all changes to the data fields to be transferred.

> **Warning:** When you edit and apply the filter, unsaved changes to the data fields

> are lost. Save any changes prior to editing the filter.

2. In the **Filter** field, add the entry **Owner**, separated by a comma; do not use spaces.
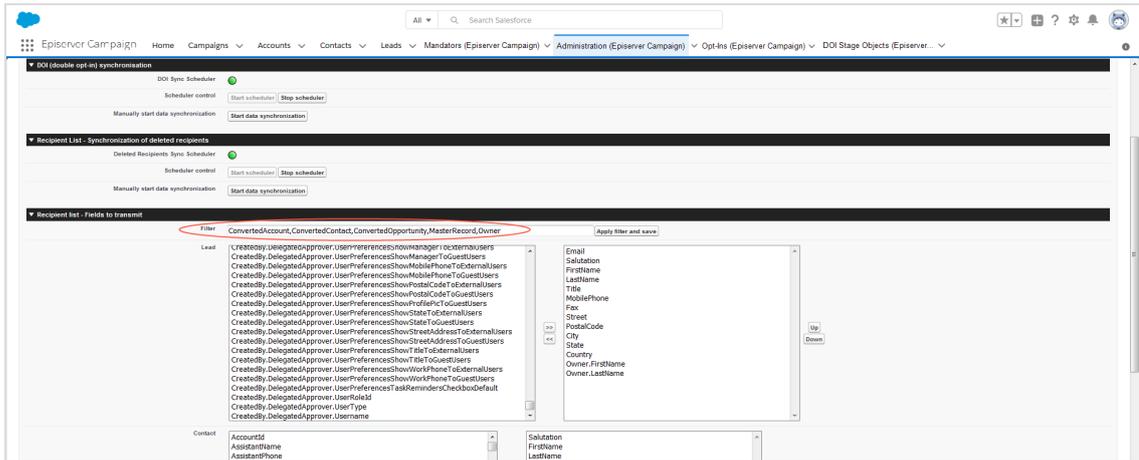
3. Click **Apply filter and save**. Data fields that start with **Owner** are now hidden and previously invisible Salesforce objects are displayed.
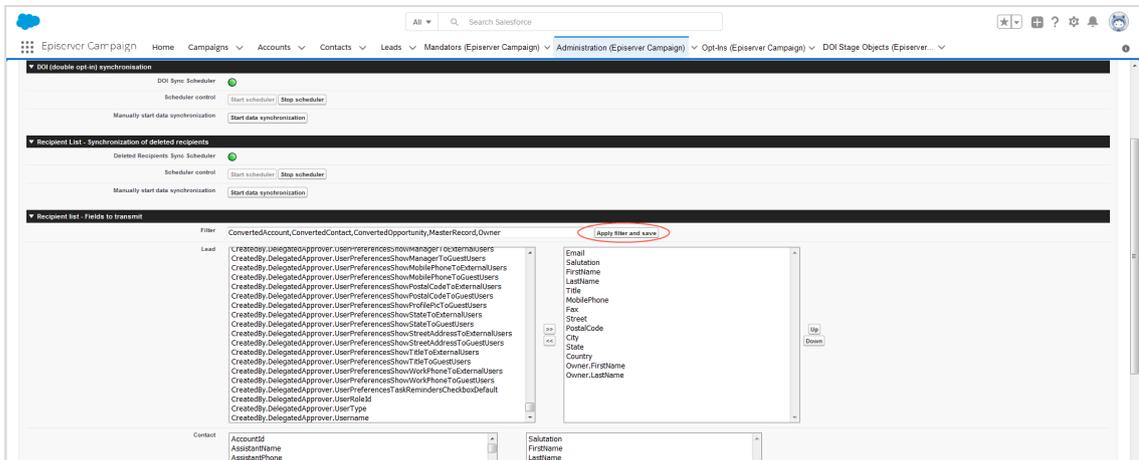
4. Locate the desired field and add it to the data fields to be transferred using the arrow button **>>**.

Requesting additional fields to be added to recipient lists

1. Under **Resulting field list for Episerver Campaign**, highlight the entire, comma-separated list of data fields to be transferred.
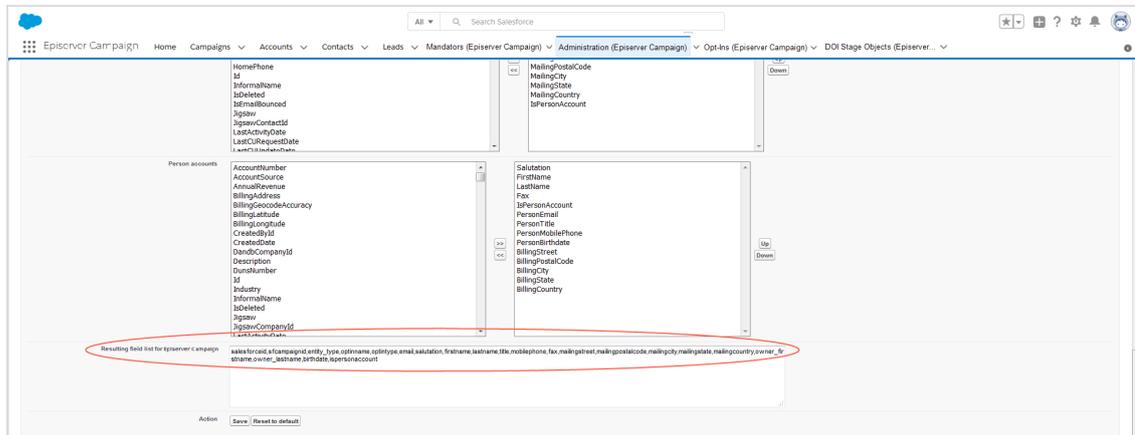
2. Copy the highlighted list to the clipboard.

3. Insert the copied list into the message text of an email and send to customer support.

4. When you receive the confirmation email, click **Start scheduler** in the **Administration(Episerver Campaign)** tab to enable automatically data synchronization.

Once data exchange is enabled, the additional data fields are automatically transferred to Episerver Campaign. You can use the corresponding Salesforce objects to personalize your mailings via field functions.


Sending campaign mailings

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

With the Salesforce add-on, you can send mailings via Episerver Campaign from your Salesforce CRM. After the mailing is sent, response data (openings, clicks, direct replies, unsubscriptions and outbounces) are automatically imported into Salesforce from Episerver Campaign.

> **Note:** Response data can not be transferred for campaigns initiated directly in Episerver Campaign or the activities of marketing automation.

These are the steps to send a mailing:

1. **Prepare** a Smart Campaign with at least one mailing in Episerver Campaign.

2. **Create** a CRM campaign in Salesforce and add members.

3. **Start** the dispatch of the Episerver Campaign mailing in Salesforce.

Preparing a Smart Campaign in Episerver Campaign

The Smart Campaign set up requires at least these nodes:

- **Recipients** node, to which you assign the **Master recipient list** of the closed-loop interface. This is set up by the Episerver customer support, when your client is configured.
- **Wait** node, to enable the **Wait until import has been finished** option.
- Message node, containing the mailing to be sent. The Salesforce add-on supports these media types: **Email**, **SMS**.

To configure a Smart Campaign, do the following:

1. Log in to Episerver Campaign.
2. Open the start menu and select **Campaigns** > **Smart Campaigns**.
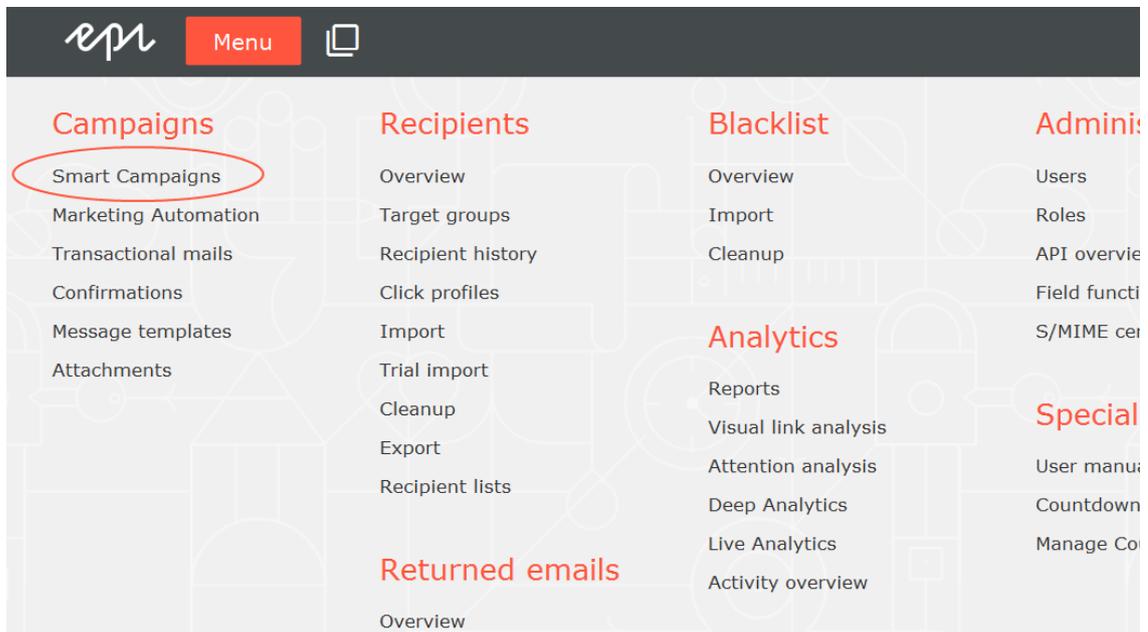
3. In the **Campaigns** window, click **Create**.
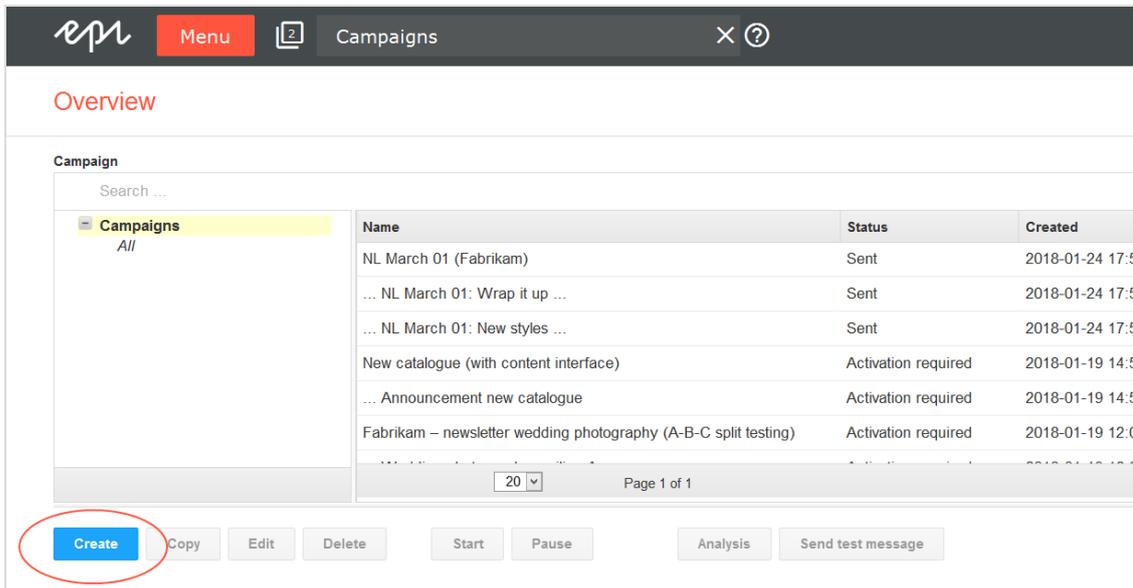
4. Drag the **Recipients** node from the left action area to the working area on the right.
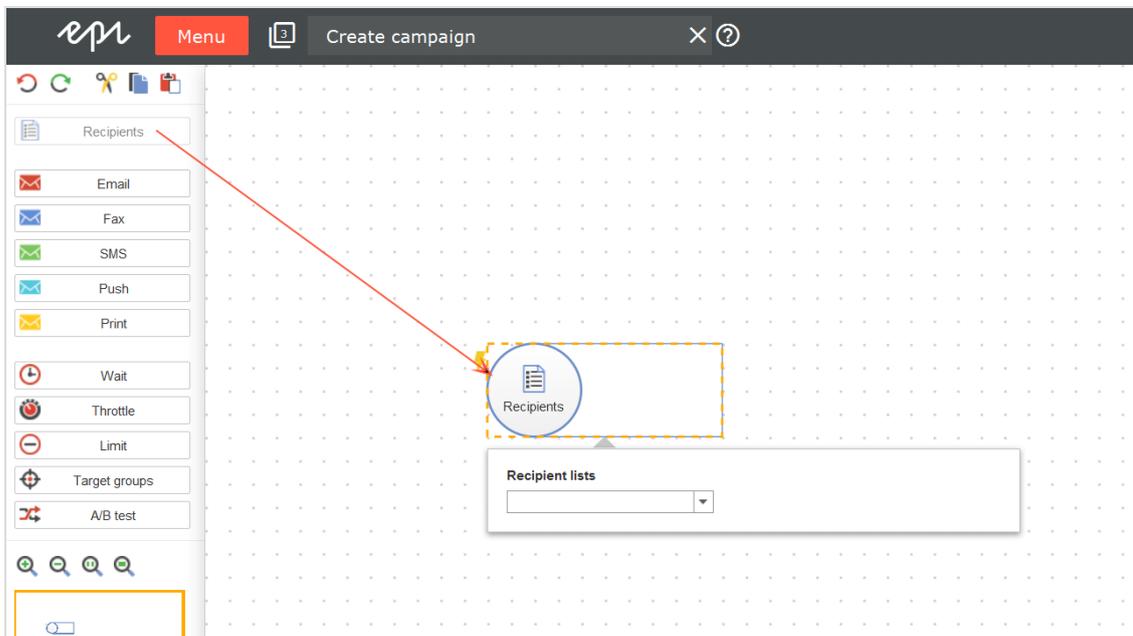
5. Select the master recipient list in the **Recipient lists** drop-down list of the context menu. Make sure you use the master recipient list provided with the Salesforce integration setup.
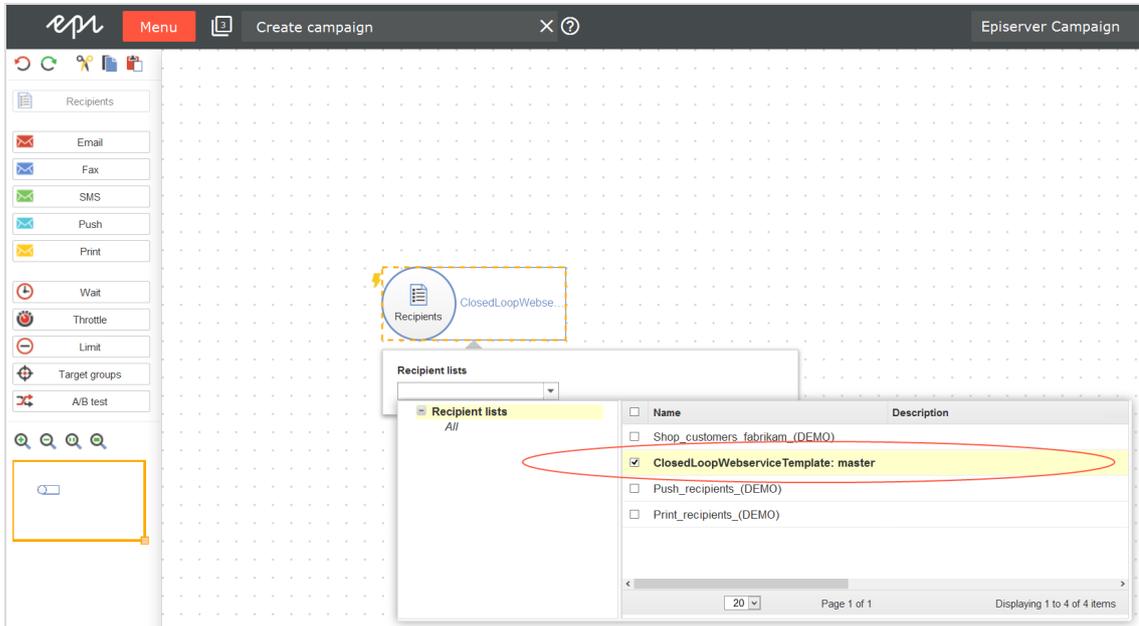
6. Drag the **Wait** node from the left action area to the working area on the right.
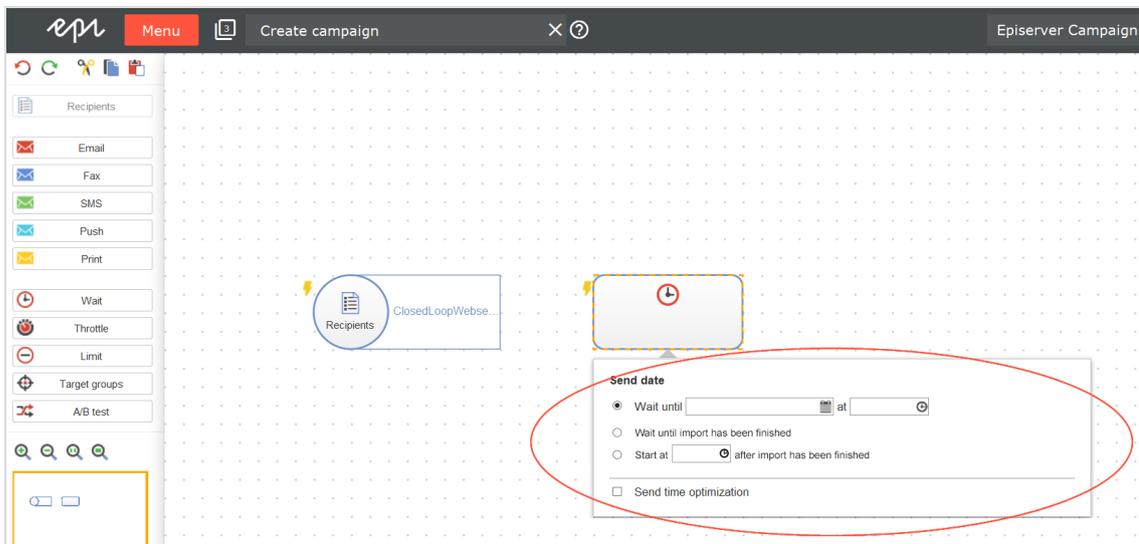
7. In the context menu, enable the option **Wait until import has been finished**.
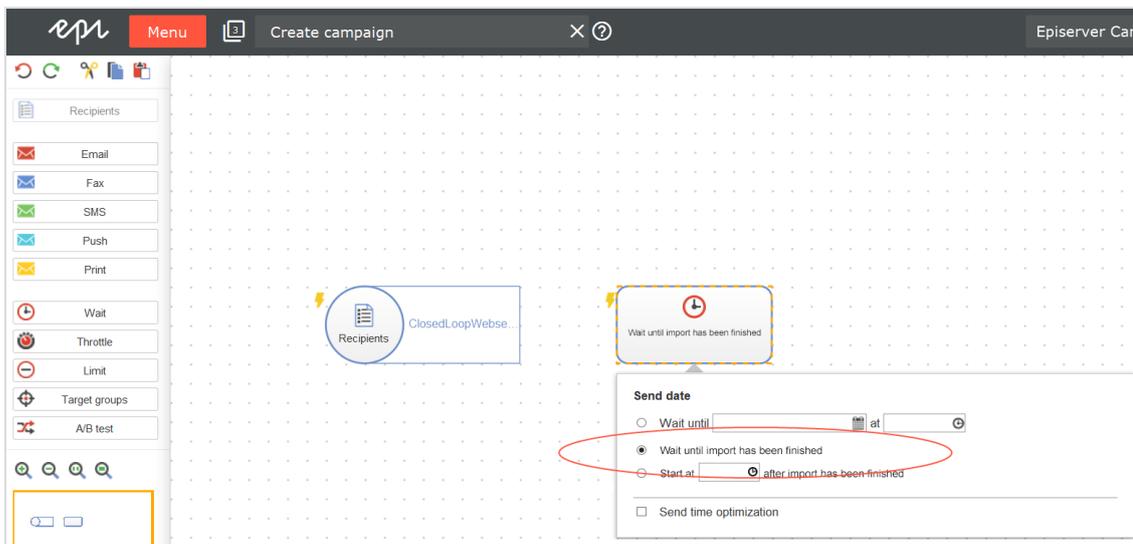
8. Drag a message node (email, SMS) from the left action area to the working area on the right.
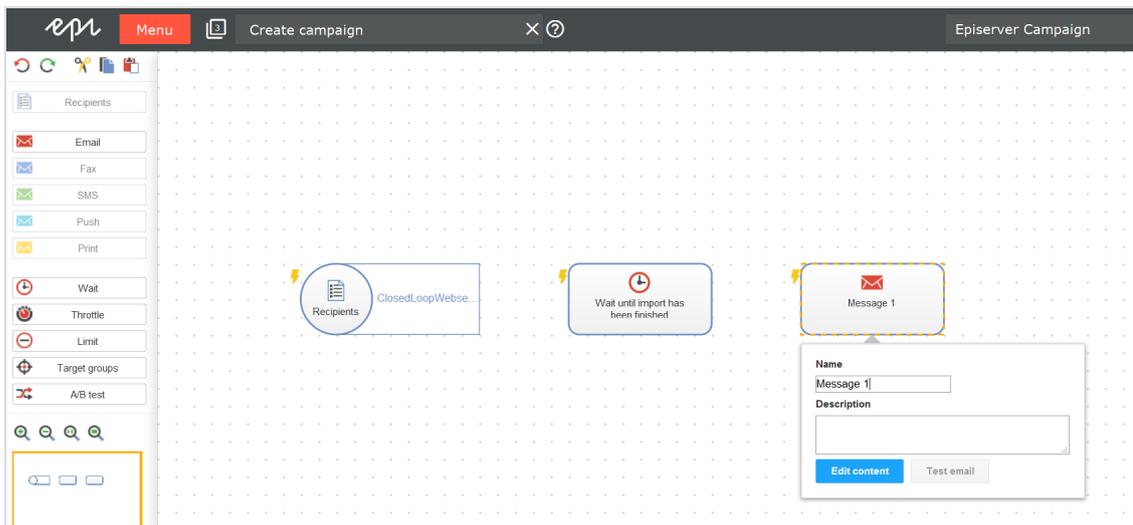
9. Click **Edit content**, select a template and insert your message content into the mailing. Design your Smart Campaigns mailing as usual, using available tools and features. See **Edit mailing content**.

10. Click **Close**.
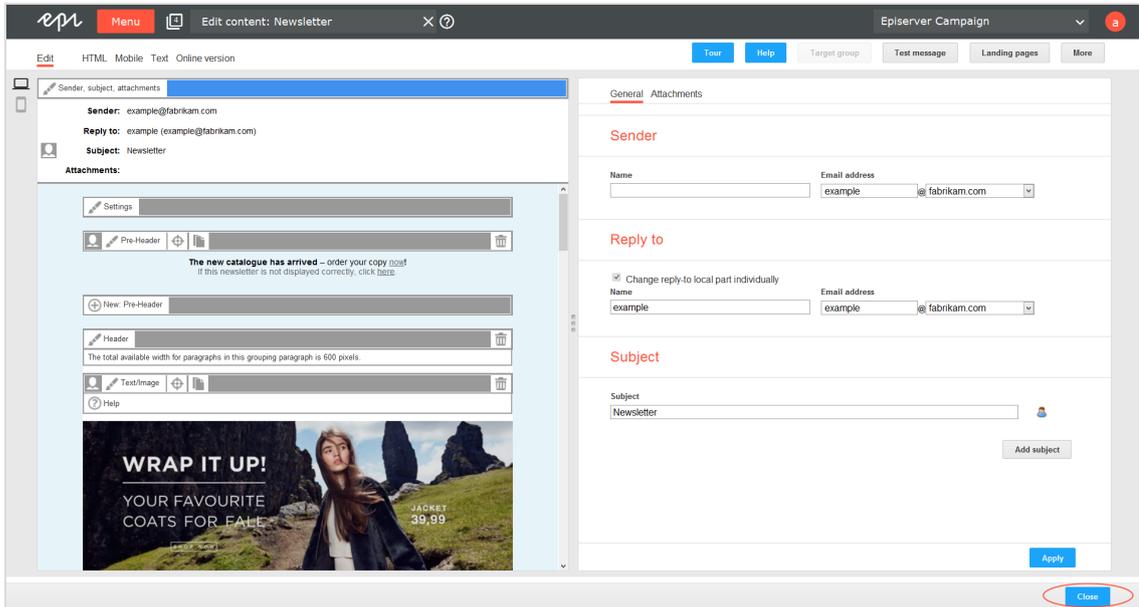
11. Connect the campaign nodes.
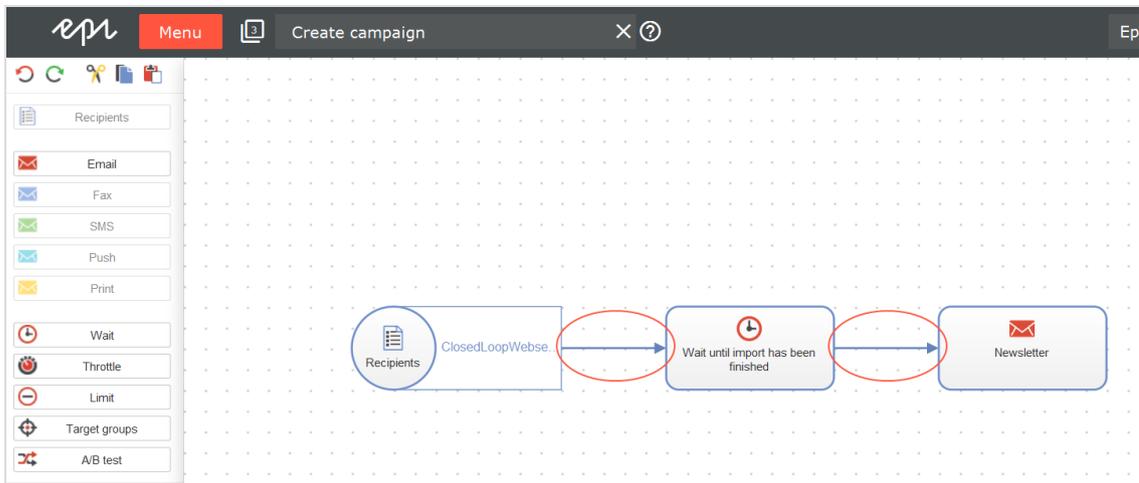
12. Click **Save and Close**, enter a campaign name and click **Save**.
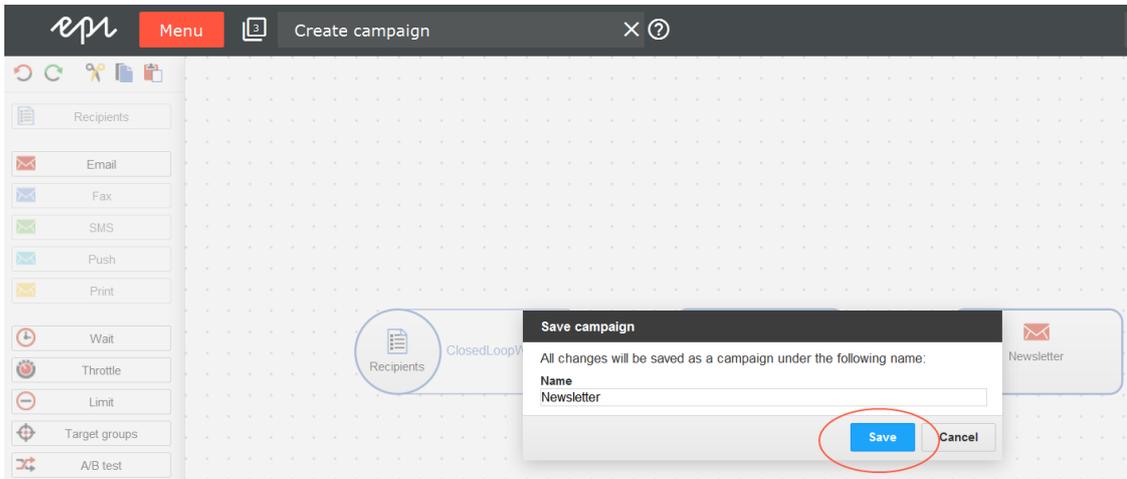
> **Note:** Do not activate and send the campaign mailing. If you do, you cannot start and send it from Salesforce anymore. If you start and send the mailing from Salesforce later, the mailing is automatically duplicated. You can delete the original in Episerver Campaign after it is sent.

Creating a CRM campaign and adding members

The CRM campaign in Salesforce controls the Smart Campaign created in Episerver Campaign. With the CRM campaign, you trigger the mailing dispatch in Episerver Campaign and transfer the selected contacts and leads (members of the CRM campaign) into the Episerver Campaign recipient list.

Use the regular features in Salesforce to create a CRM campaign and assign members. The following steps shows an example of how to do this.

1. Log in to Salesforce CRM.
2. Click **Campaigns**.
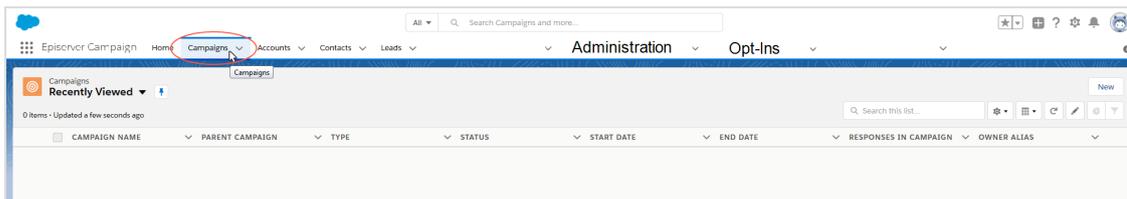
3. Click **New**.
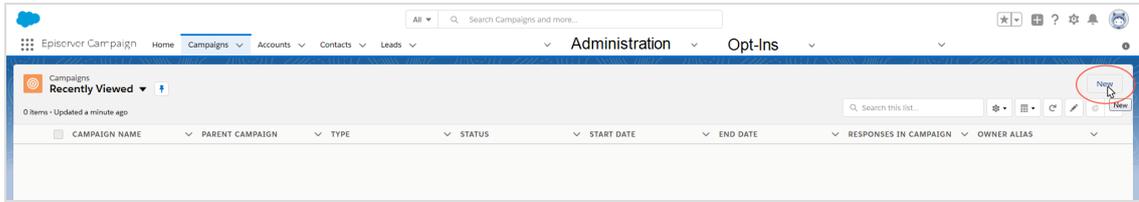
4. Enter the desired campaign information and description.
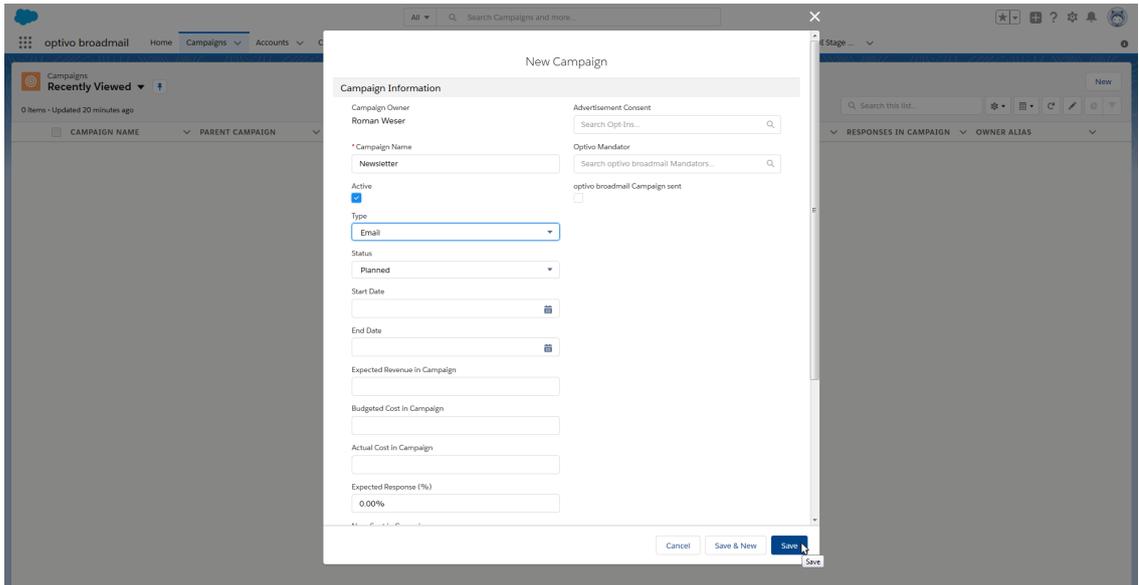
5. In the **Advertisement Consent** field, enter the advertising permission that you want to assign to the campaign.

6. In the **Episerver Mandator** field, select the client in which you have prepared the mailing that is to be sent. (In the example, the client's name is *Episerver Campaign*).

7. Click **Save**.

8. In the **Campaign Members** area, click on **Add Contacts** or **Add Leads** or **Add Person Accounts**.
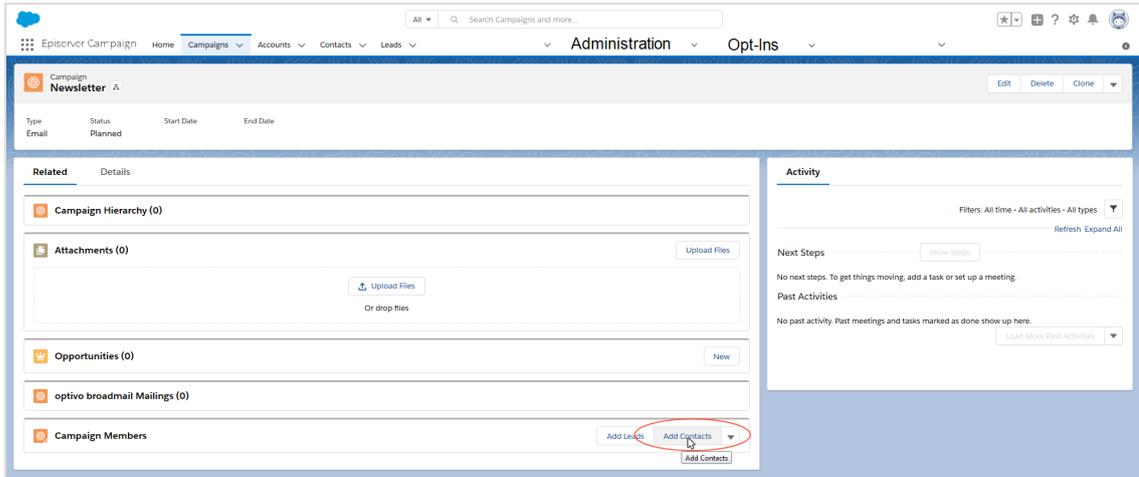
9. Select the contacts or leads or personal accounts that you want to add to the campaign.
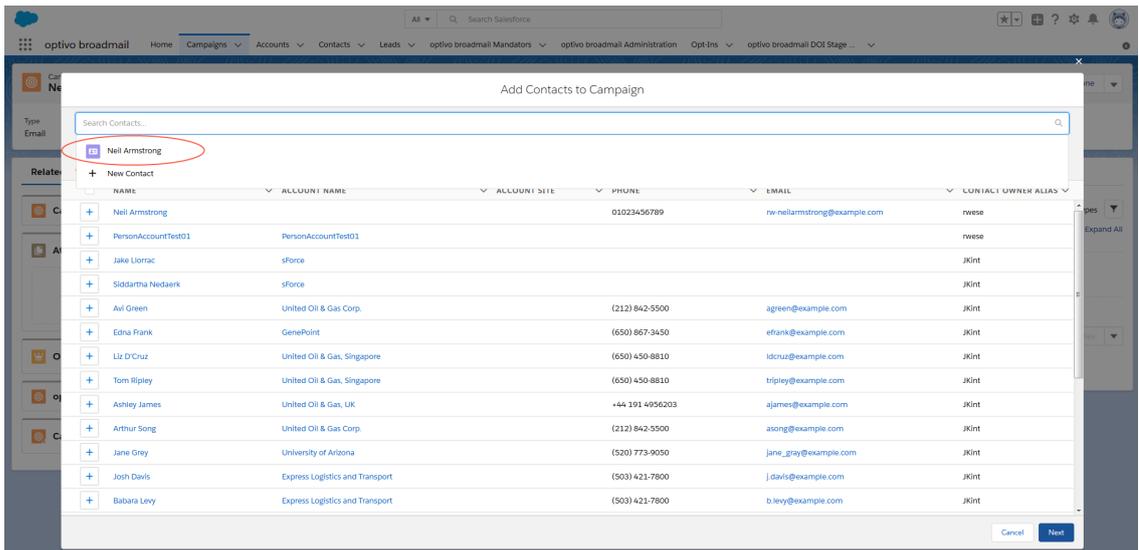
10. Click **Next**.
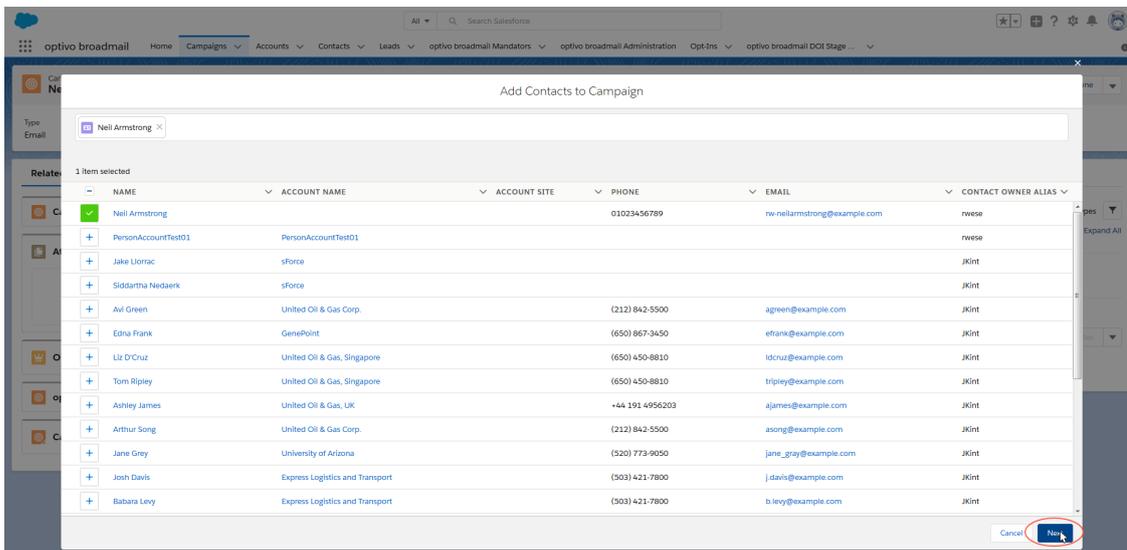
11. Click **Submit**.
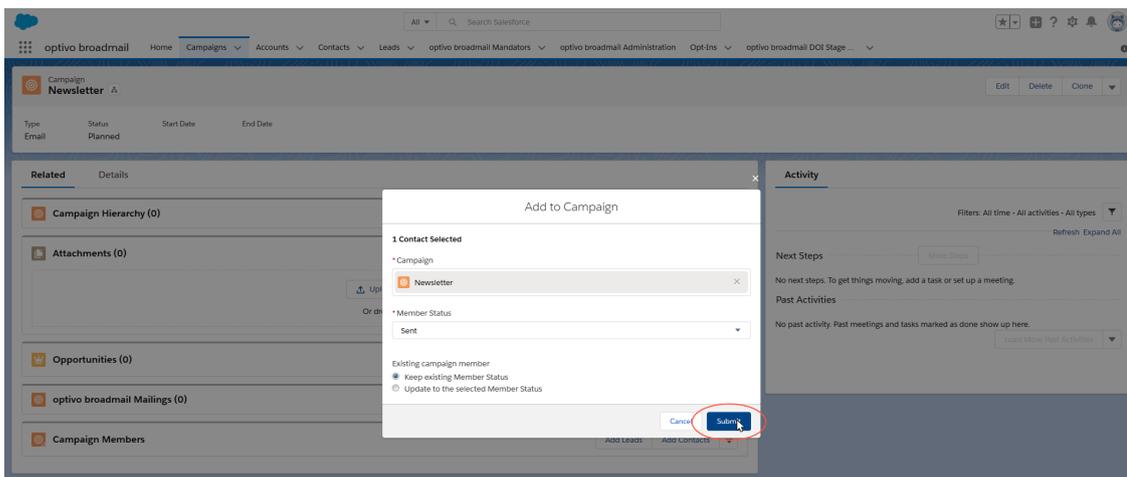
The **<Your campaign name> Campaign** window opens again. Keep this window open as it is needed in the next step: **Starting the mailing dispatch in Salesforce**.

Starting the mailing dispatch in Salesforce

1. In the **<Your campaign name> Campaign** window, click on the downward-pointing triangle on the upper right side and select the **Start mailing** option.
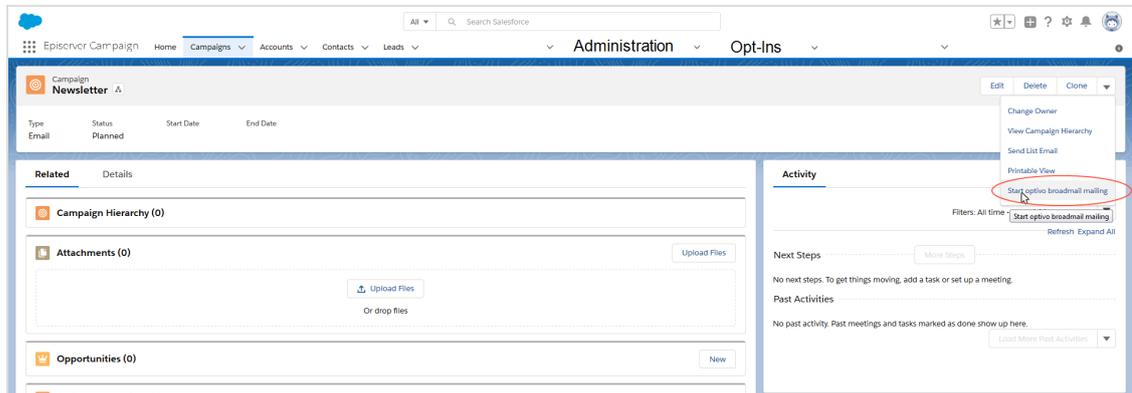
2. In the **Episerver Campaign** window, check under **Opt-In** that the correct advertising permission has been selected. Use the drop-down list to change the advertising permission if necessary.
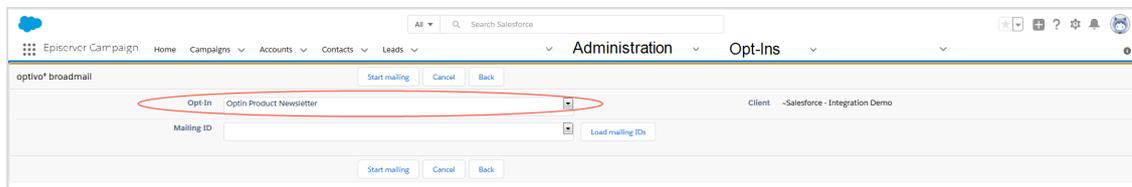
3. Click **Load mailing IDs**.
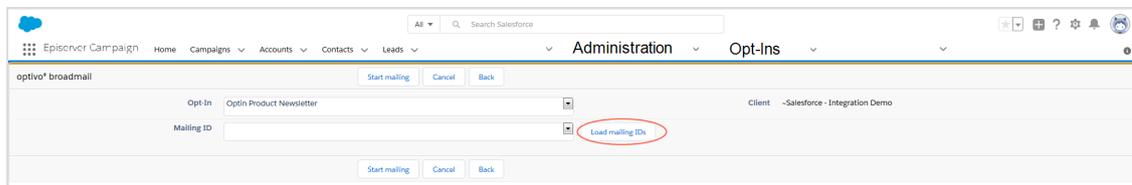
The **Mailing ID** drop-down list loads the mailing ID of the mailings you prepared. For multiple mailings, the IDs for these are loaded.
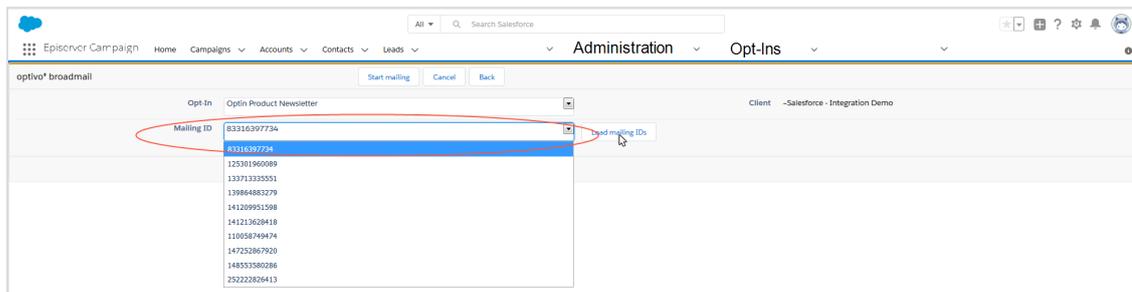
4. For multiple mailings, select the ID for the desired mailing from the **Mailing ID** drop-down list. To see the mailing IDs, go to start menu > **Campaigns** > **Smart Campaigns** and copy the relevant mailing ID from the **ID** column of the campaigns overview. Do not confuse the *campaign ID* with the *mailing ID*. Mailings

are indented in the list and the mailing name is preceded by three dots.
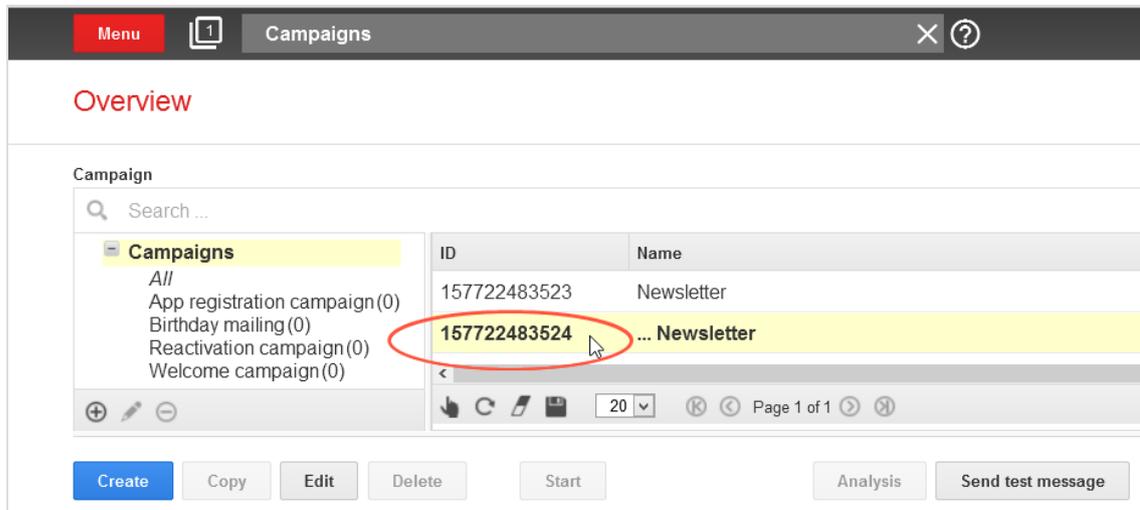
5. Click **Start mailing** (in Salesforce). The contacts/leads that you added to your CRM campaign as members are transferred to Episerver Campaign.
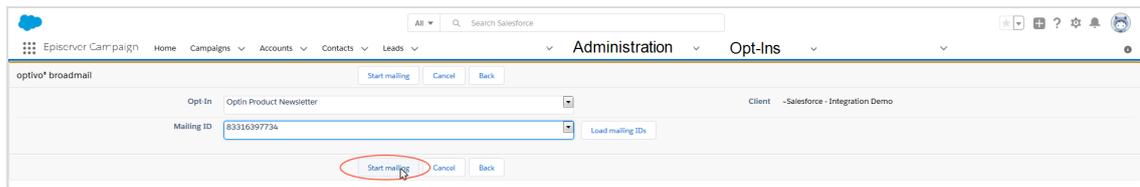
6. To check the current dispatch status for the mailing, click **Back**.
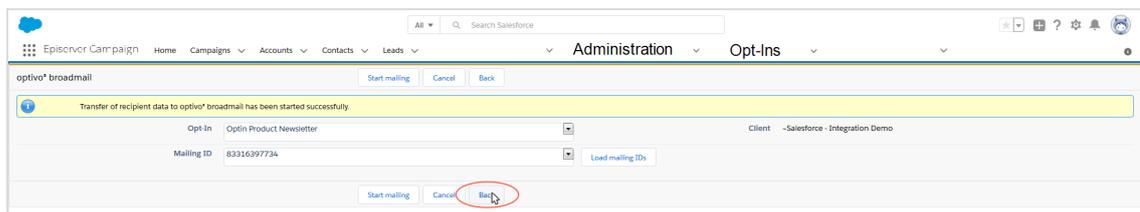
The **<Your campaign name> Campaign** window opens.

7. Check the sending status in the **Details** tab. A selected check box indicates that the mailing was sent successfully.
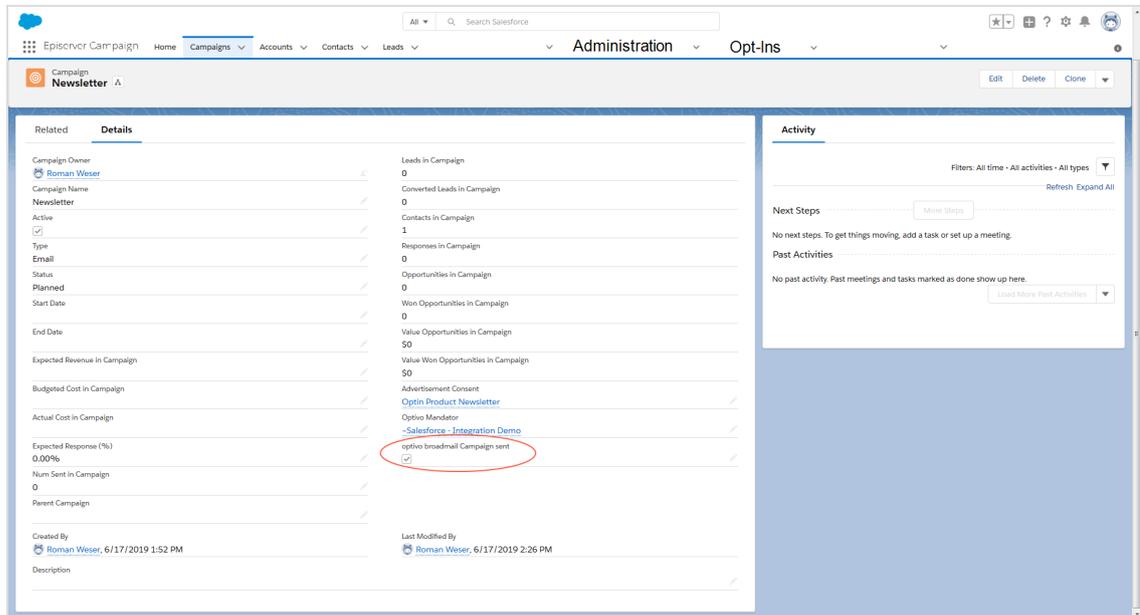
Copying data sets in recipient lists

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

The Salesforce add-on adds two Apex classes to Salesforce Process Builder with which you can copy and synchronize the data sets of contacts, leads, and personal accounts with your Episerver Campaign recipient lists:

- **Upsert Recipient**. Updating recipients or adding new recipients.
- **Delete Recipient**. Deleting leads, contacts, and personal accounts from an Episerver Campaign recipient list.

Requirements

Episerver customer support must prepare your Episerver Campaign recipient lists for the Salesforce synchronization. Provide information about the client in which you want to use recipient lists for the Salesforce synchronization.

Generating processes and using Apex classes

Once customer support has prepared the desired recipient lists, set up processes in Salesforce to automatically copy contacts, leads, and personal accounts in Episerver Campaign recipient lists. For example, you can set up processes that filter customers according to a certain status and transfer them to a corresponding recipient list, such as *new customers* in a recipient list that only contains new customers.

For contacts, leads, and personal accounts in this example, a Boolean reference field (true/false) called **Premium Customer** was created first that you will need for configuring the process. See Creating reference fields.

Setting up processes

1. Go to the **Setup** area in Salesforce.
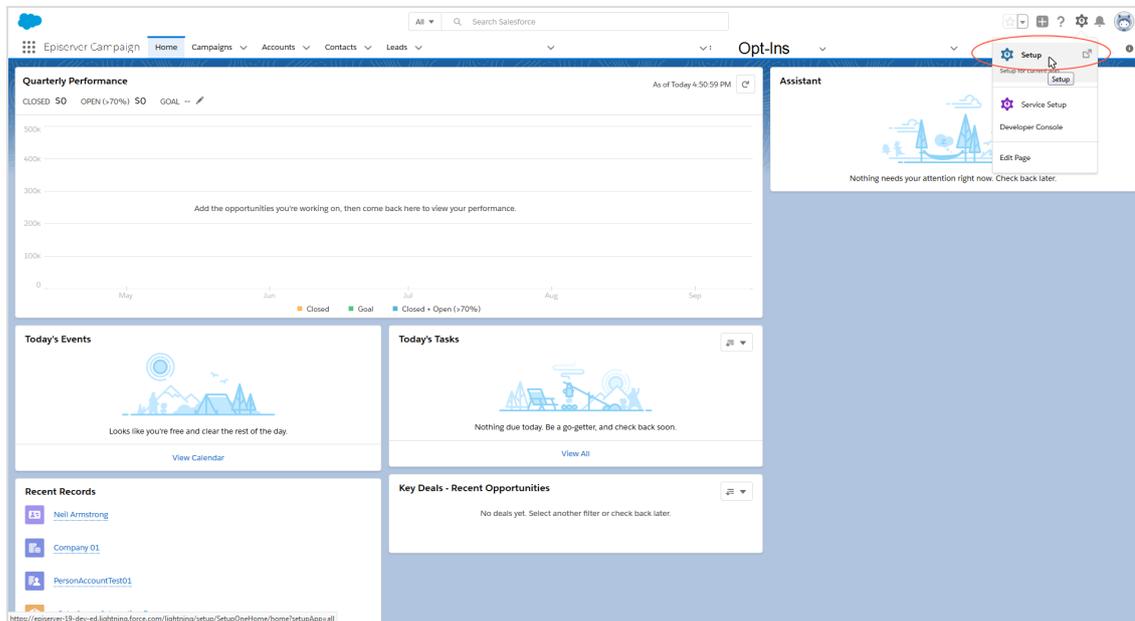
2. In the left menu bar, click **Process Automation** > **Process Builder**.
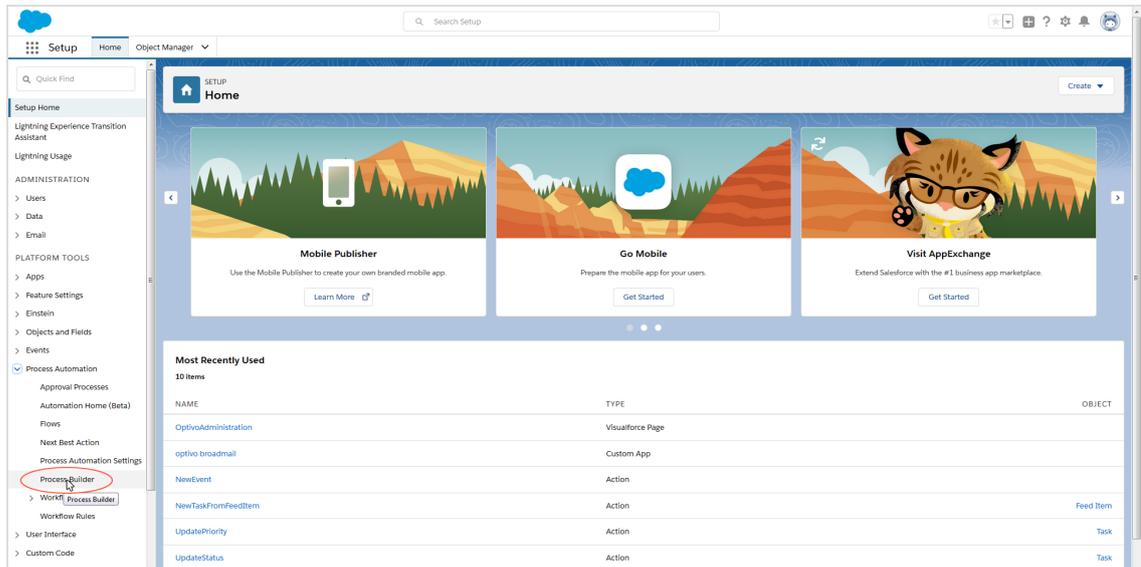
3. In the **My Processes** window, click **New**.
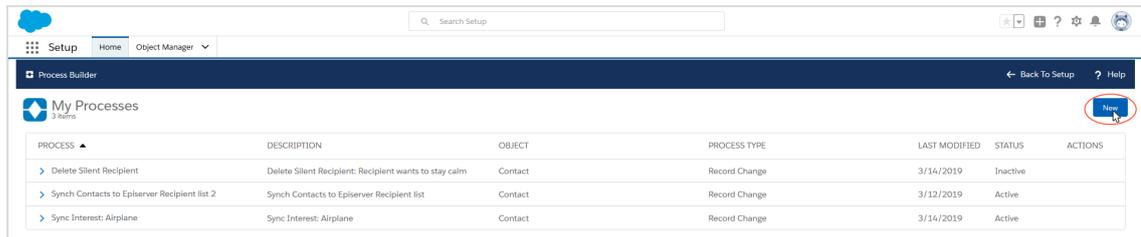
4. In the **Process Name** field, enter a name for the process, such as *Premium Customers*.
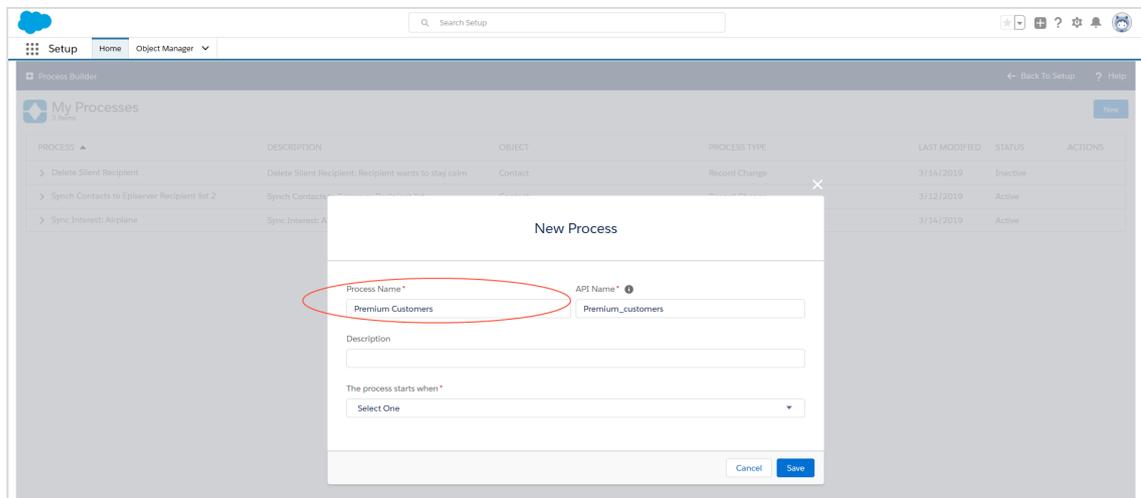
5. Enter a name under **API Name**, such as *Premium_Customers*.

6. Optional: Enter a description in the **Description** field.

7. Select **A record changes** in the **The process starts when** drop-down list.
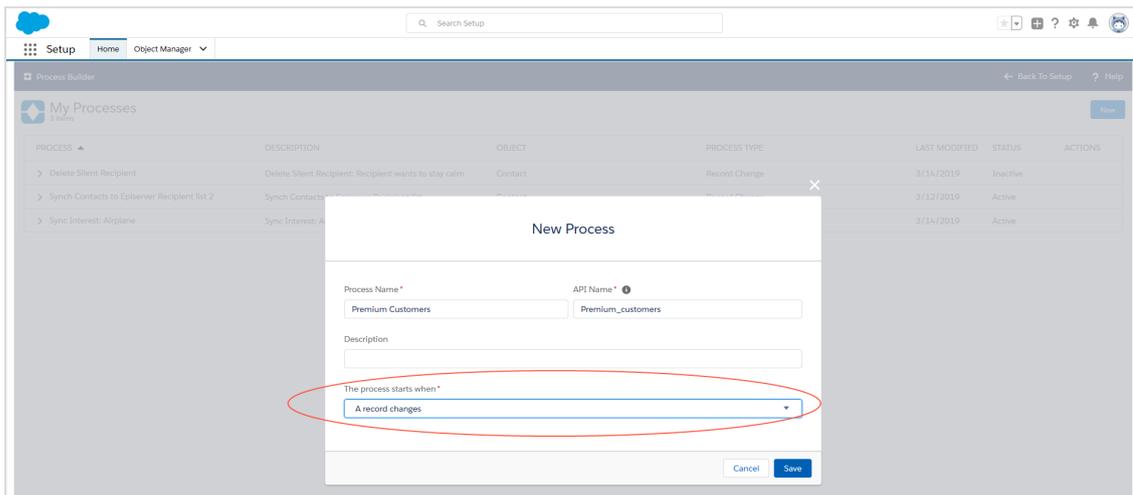
8. Click **Save**.

Adding criteria and defining Apex classes

1. Click **Add object** in the flowchart.
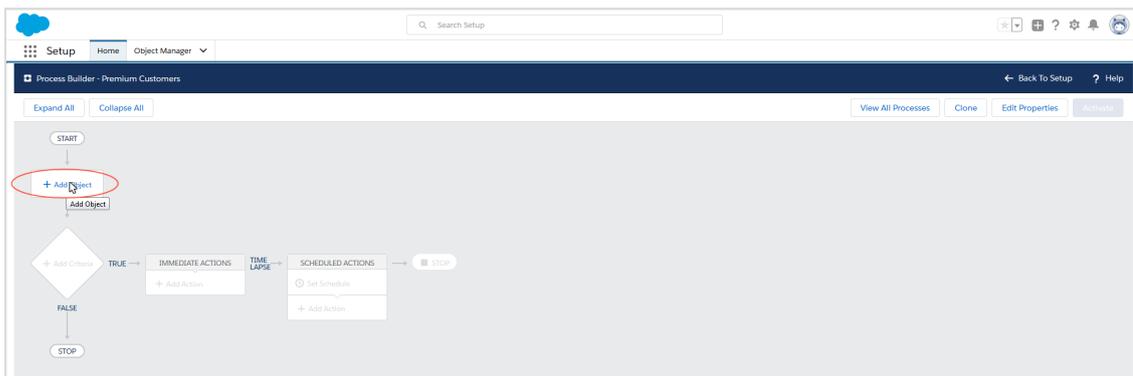
2. In the **Choose Object and Specify When to Start the Process** window, select the entity in the **Object** drop-down list that you want to set up the process for: **Lead**, **Contact**, or **Person Account**.
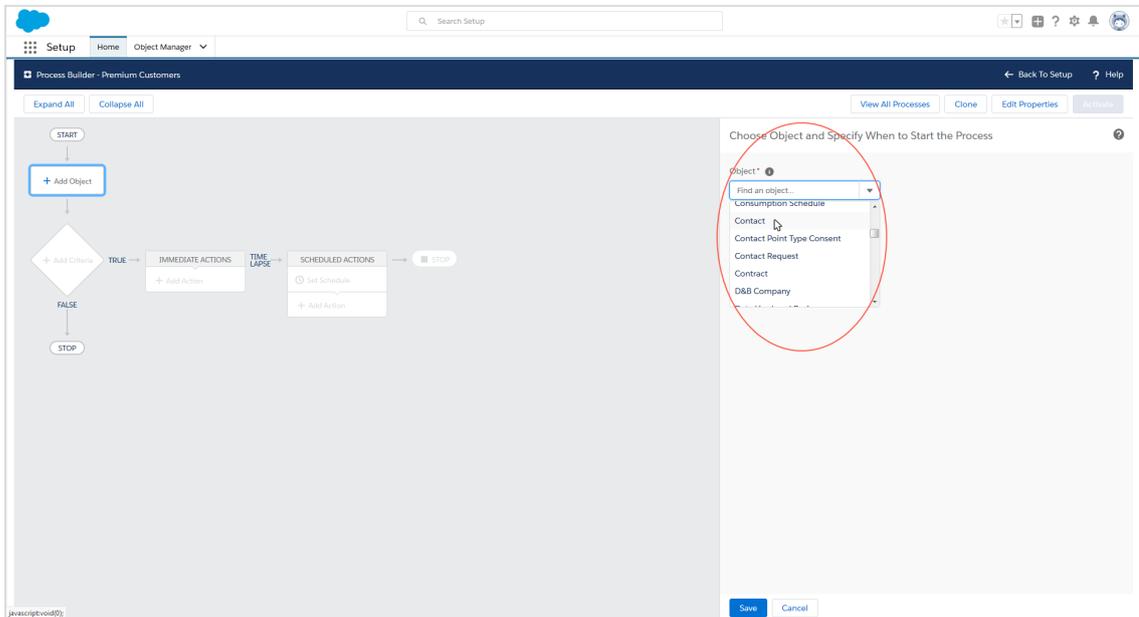
3. Under **Start the process**, enable **when a record is created or edited**.
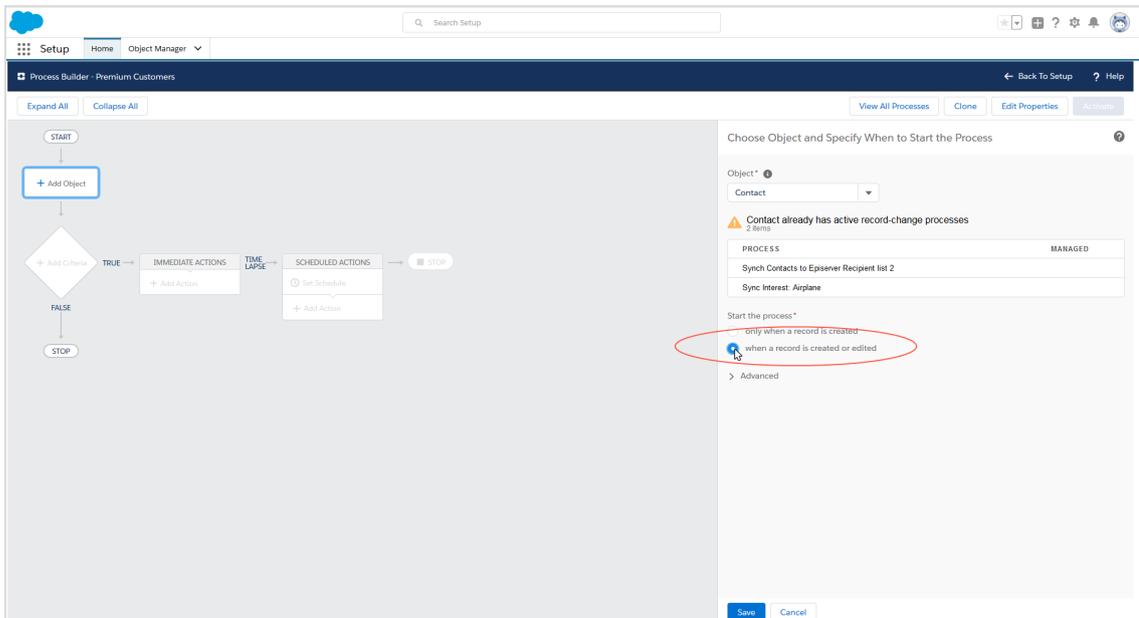
4. Click **Save**.

5. Click **+ Add criteria**.
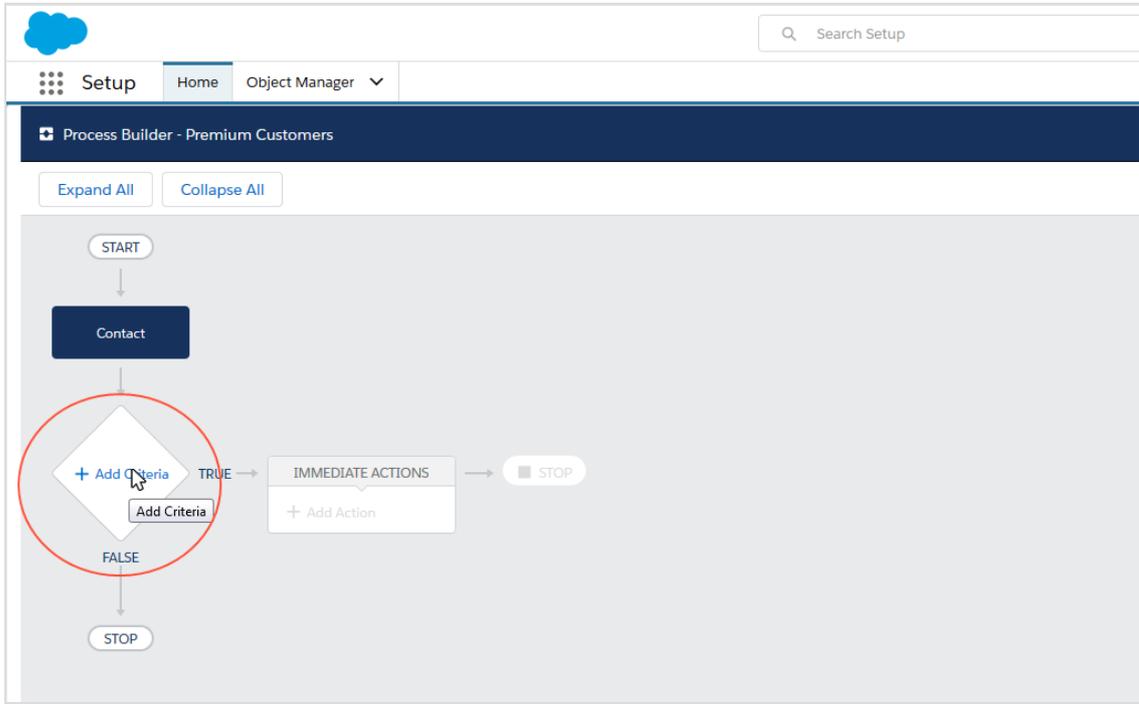
6. In the right window, enter a name for the criterion in the **Criteria Name** field, such as *Is Premium Customer*.

7. Under **Criteria for Executing Actions**, select **Conditions are met**.
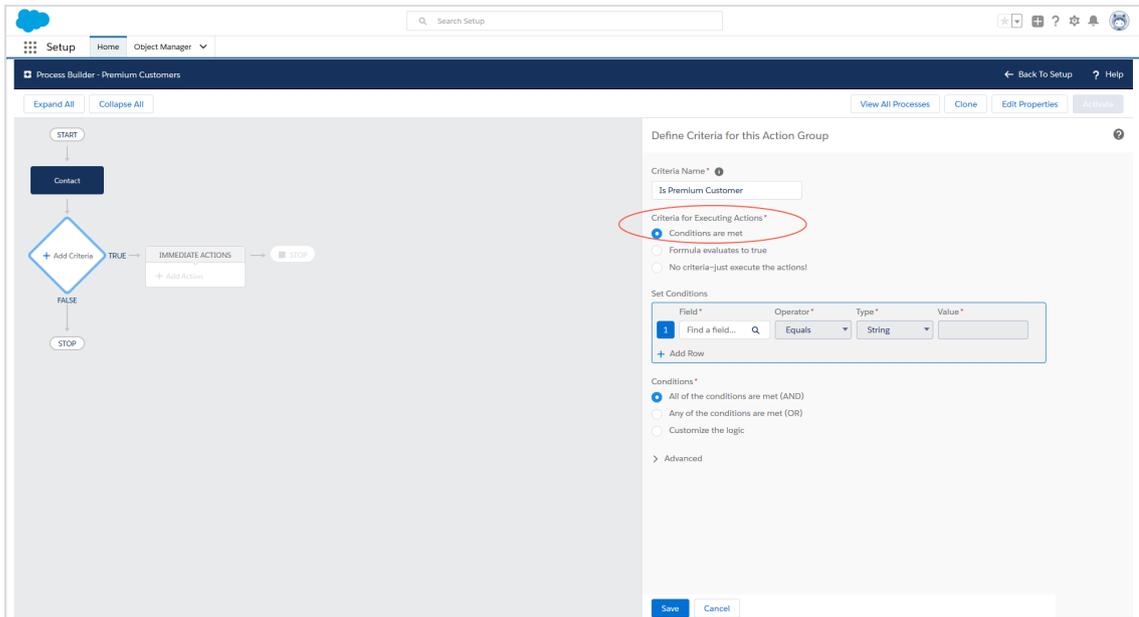
8. Under **Set conditions**, select the **Premium Customer** reference field from the drop-down list under **Field** and confirm your selection.
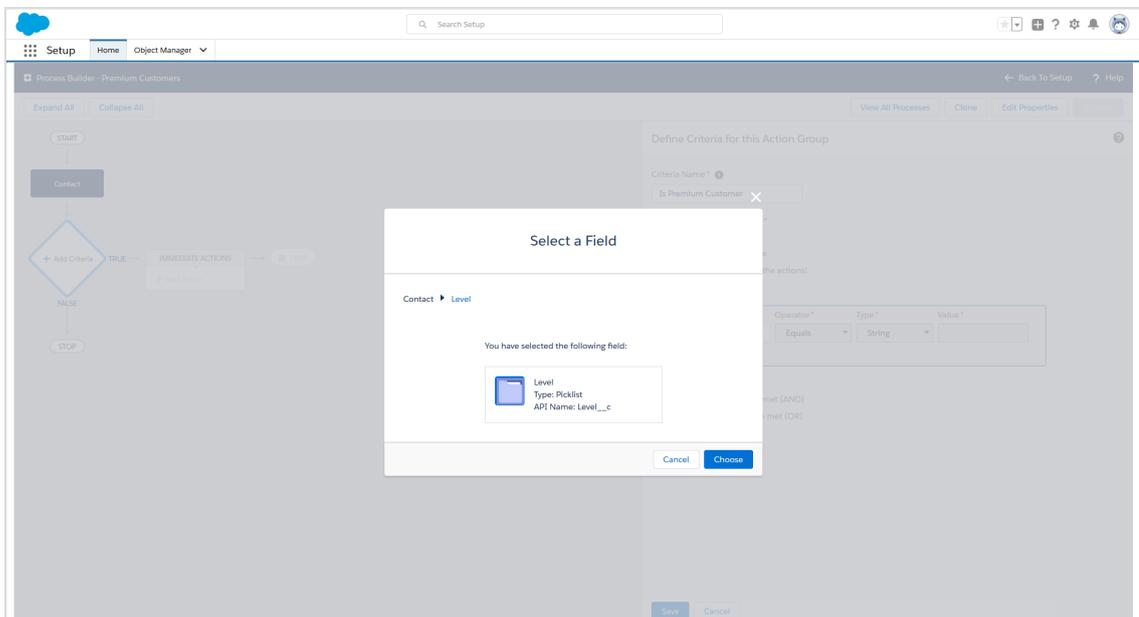
9. Set the **Operator** to **Equals**, the **Type** to **Picklist**, and the **Value** to **Primary**.
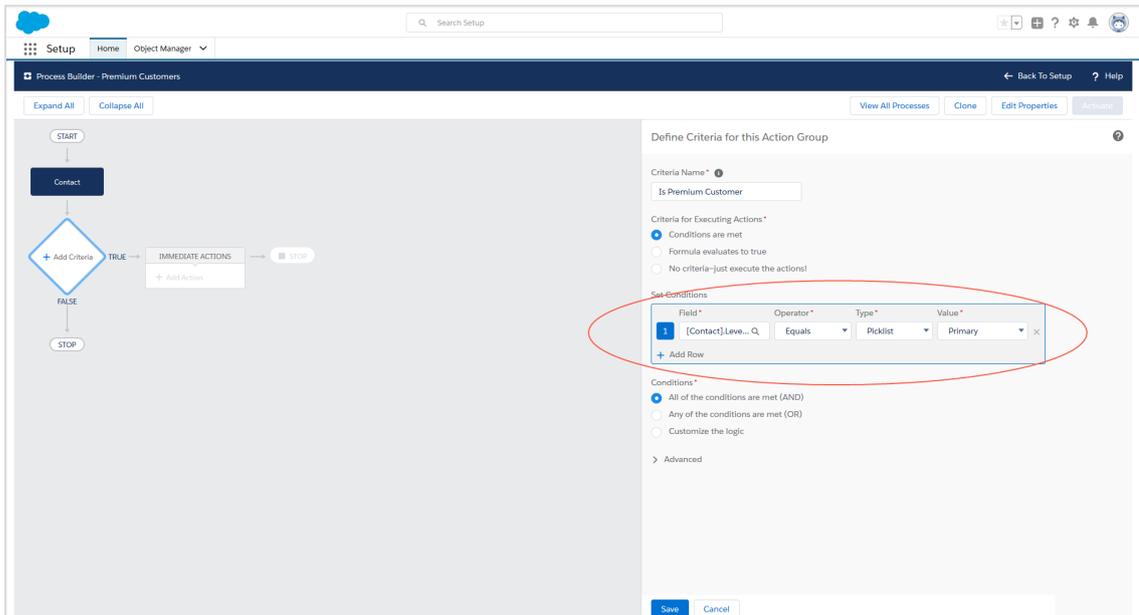
10. Under **Conditions**, select the **All of the conditions are met (AND)** option.
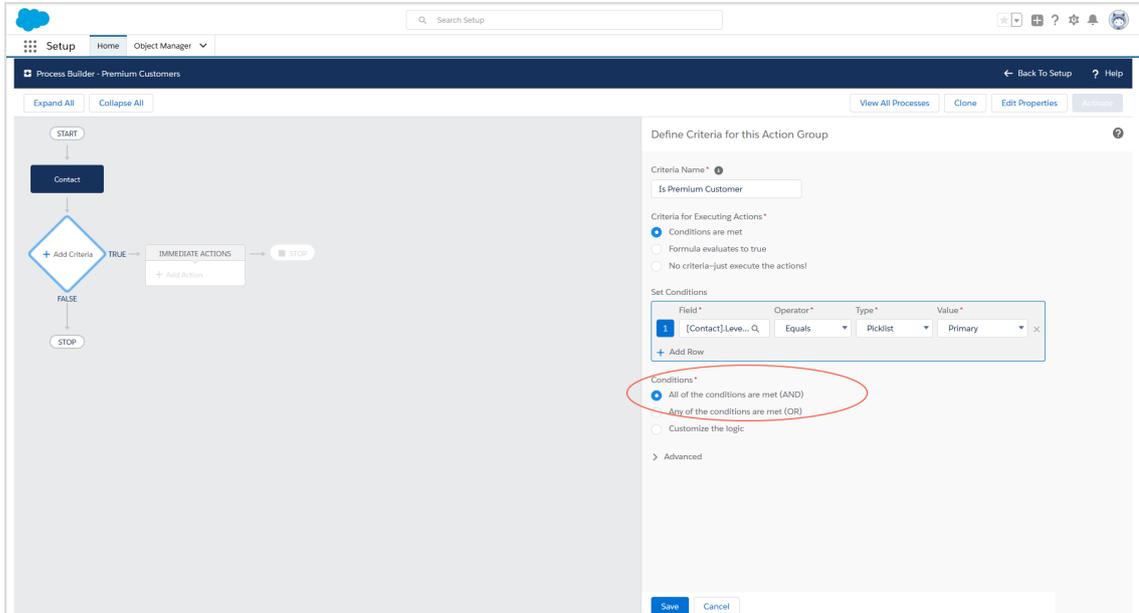
11. Click **Save**.

12. Click **Add action** under **Immediate actions** in the flowchart.
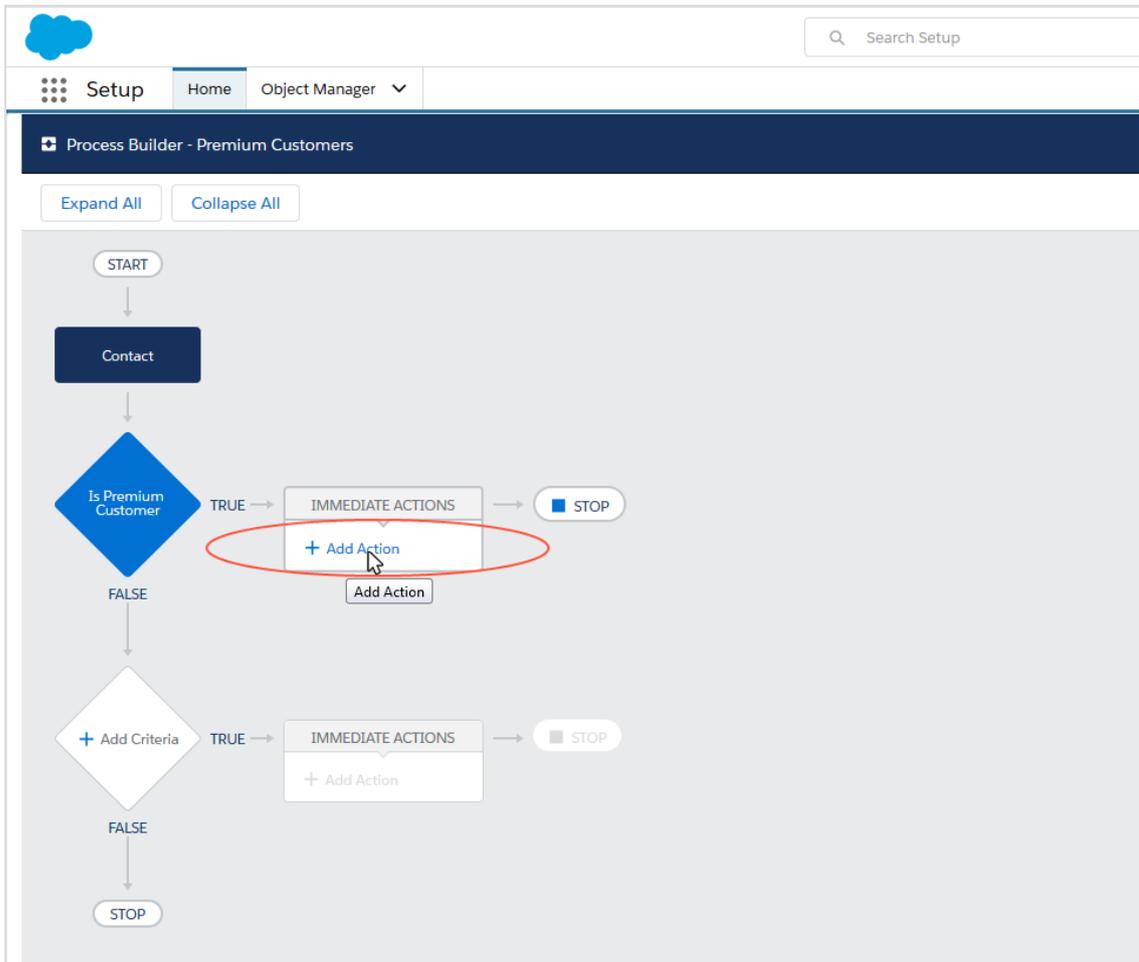
13. In the **Select and Define Action** window, select the **Apex** entry from the **Action Type** drop-down list.

14. Enter a name under **Action Name**, such as *Add Premium Customer*.

15. Select the **Upsert Recipient** entry from the **Apex Class** drop-down list.
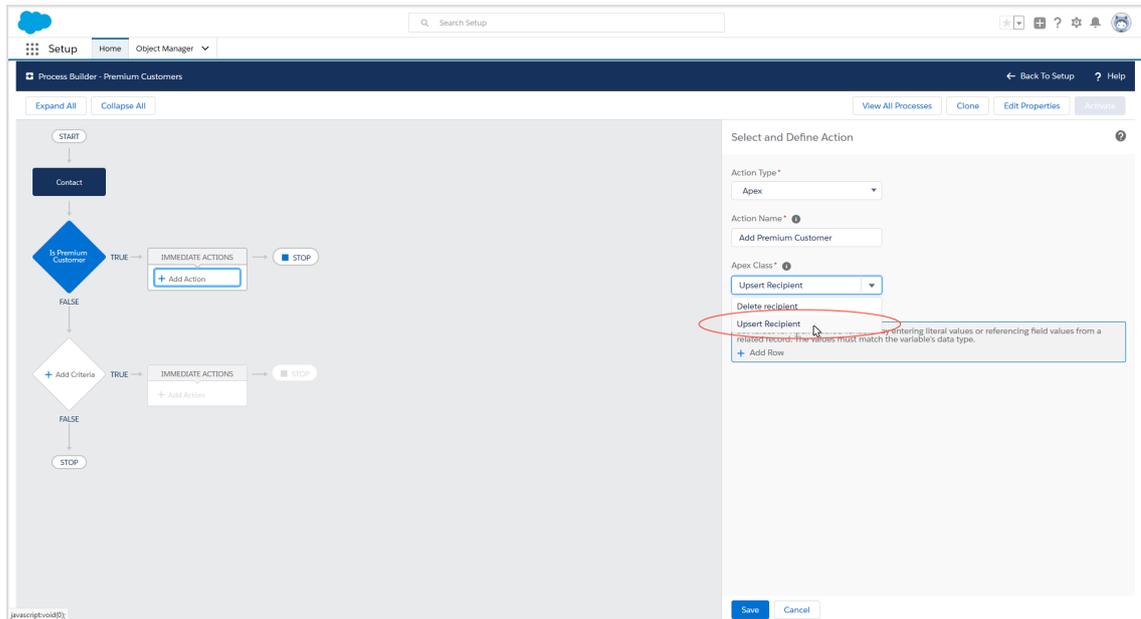
> **Note:** You need to configure three variables for the **Upsert Recipient** Apex class: **recipientId**, **recipientListId**, and **sfOptInId**.

16. Under **Set Apex Variables**, click **Add Row** three times.
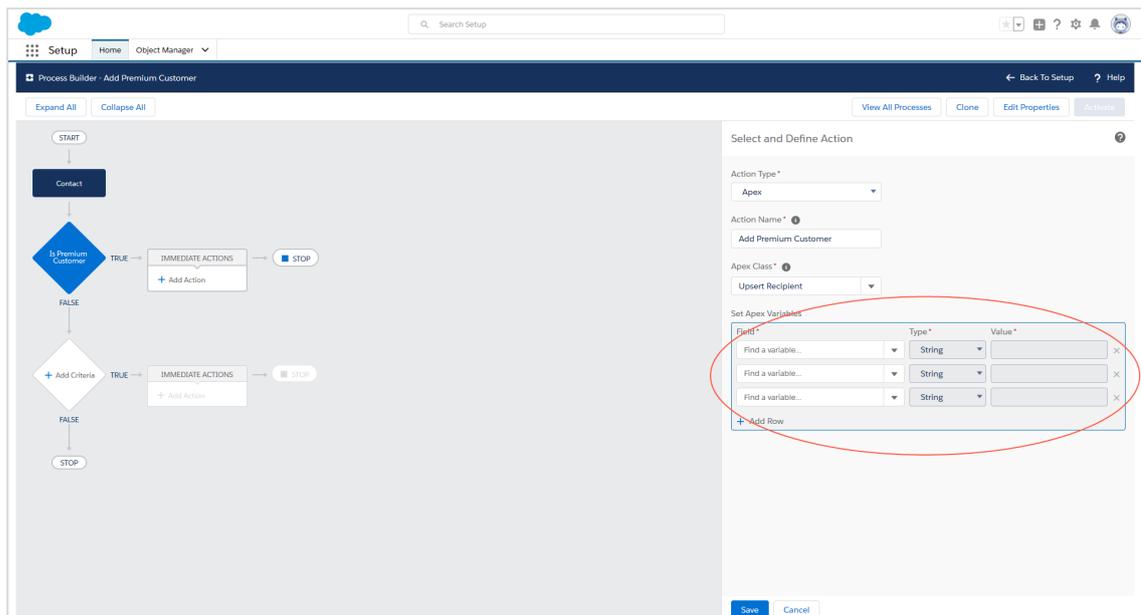
17. In the first drop-down list under **Field**, select the **recipientId** variable and set the type to **Field Reference**. Depending on the desired entity type, select the **Lead Id**, the **Contact Id**, or the **Personal Account Id** in the **Value** field.
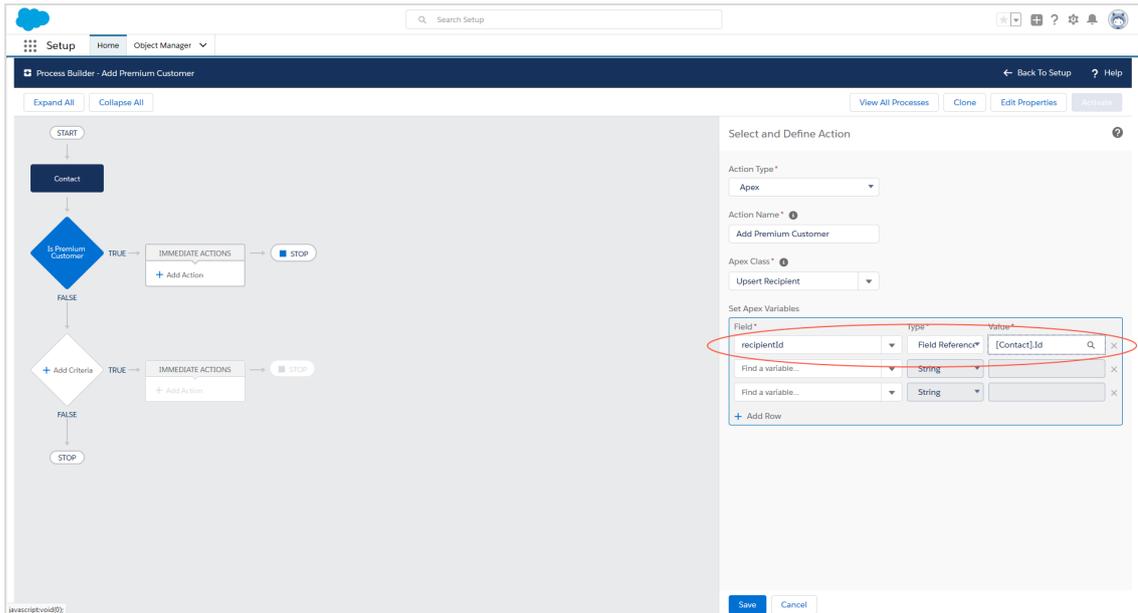
18. In the second drop-down list under **Field**, select the **RecipientListId** variable and set the value to the ID of the Episerver Campaign recipient list to which the *Premium Customers* are to be copied. You can find the recipient list ID in Episerver Campaign under **Administration** > **API overview** > **Recipient lists**.
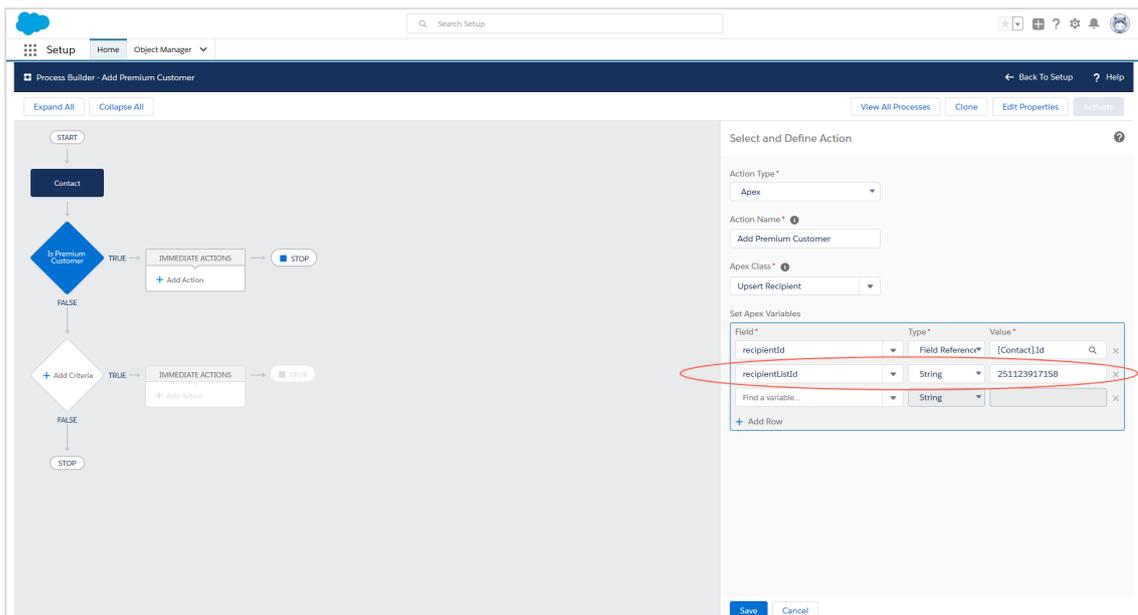
19. In the third drop-down list under **Field**, select the **sfOptInId** variable and set the value to the Salesforce ID of the created advertising permission. The type will automatically be set to **String**; do not make any changes here.
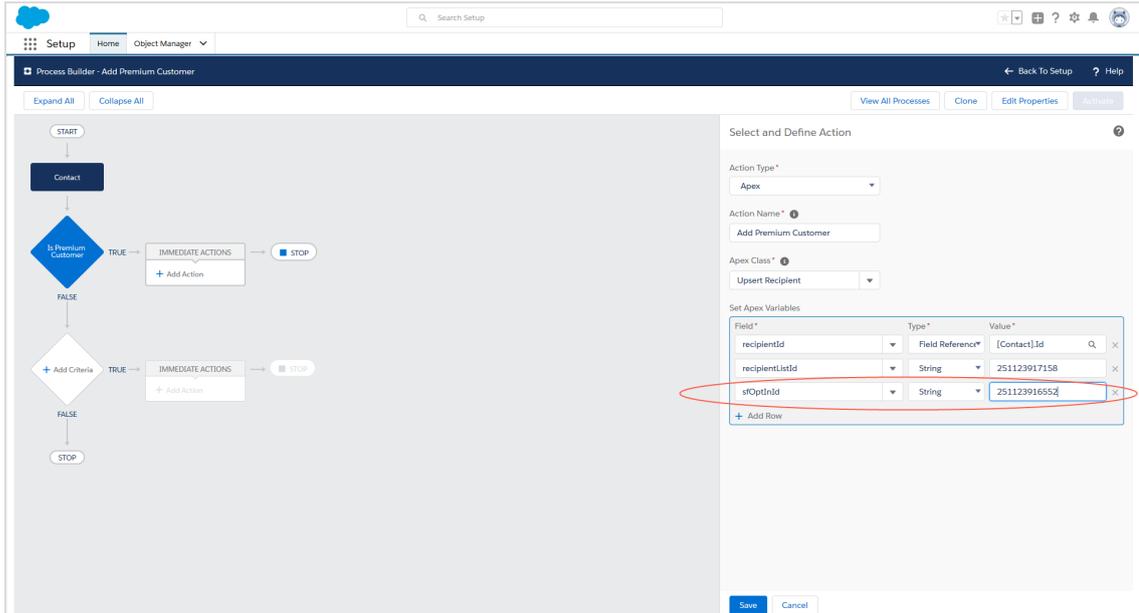
20. Click **Save**.

Deleting recipients from one recipient list and adding them to another recipient List

For example, a *Premium Customer* has achieved high revenues and qualified as a *Platinum Customer*. You want to delete this customer from the premium list and add it to the platinum list.

To delete recipients from one recipient list and add them to another, set up the **Delete recipient** class (which deletes the customer from the premium list) along with the **Upsert** Apex class (which adds the customer to the platinum list). Configure the **Delete recipient** Apex class only with the **recipientId** and **recipientListId** parameters. See steps 18 and 19 in the previous section.

Enabling synchronization of deleted contacts, leads, and personal accounts

To completely delete deleted contacts, leads, and personal accounts from your recipient list in your Salesforce database as well, *do not* set up a separate process in Salesforce. The Salesforce add-on takes care of synchronizing your deleted Salesforce data sets if you enable automatic synchronization of deleted contacts, leads, and/or personal accounts. Perform the following steps:

1. Open the **Administration (Episerver Campaign)** tab.
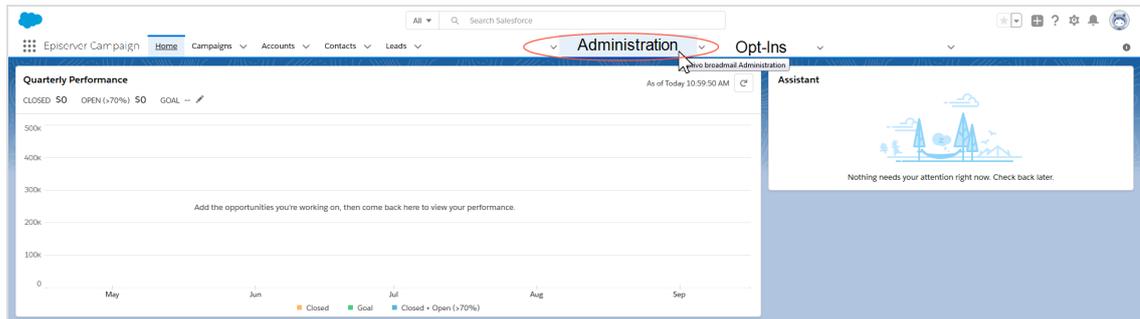
2. In the **Administration (Episerver Campaign)** window, click **Start scheduler** under **Synchronization of deleted recipients**.
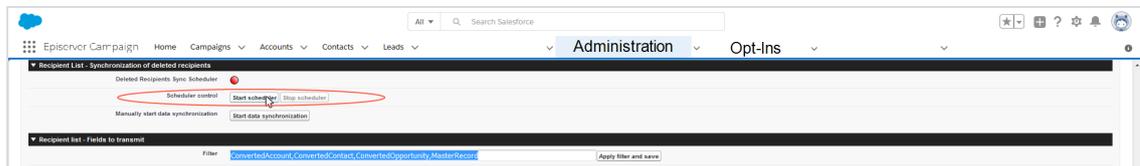
> **Tip:** Click **End** to interrupt synchronization of the deleted data sets. This may be necessary, for example if the configuration is faulty, and you need to correct it.
>
> Click **Start** under **Synchronize manually** to perform (one-time) manual data synchronization. A manual start allows you to limit the period of access between Salesforce and Episerver Campaign in the log files, thereby helping to diagnose any errors.

Import response data to Salesforce

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to automatically import the response data of your recipients (openings, clicks, unsubscribes, bounces, and direct replies) to Salesforce.

After sending a campaign, you need to enable synchronization of the response data by starting the data exchange. Once you have enabled synchronization, you will be able to view the response data and use it for additional marketing activities.

Starting data exchange

If you have set up at least one client in Salesforce (see [Configuring advertising permissions](#)), start the data exchange between Salesforce and Episerver Campaign. Perform the following steps:

1. Log in to Salesforce CRM.
2. Open the **Administration (Episerver Campaign)** tab.
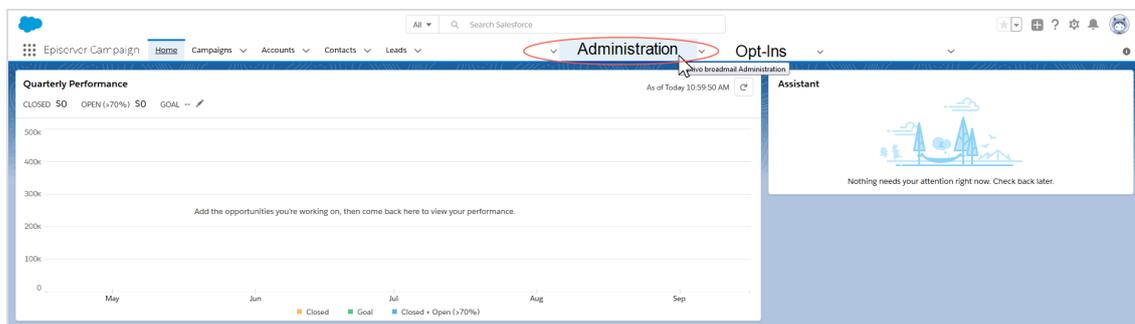
The **Administration (Episerver Campaign)** window opens.

3. Under **Response data synchronization > Scheduler control**, click **Start scheduler**.
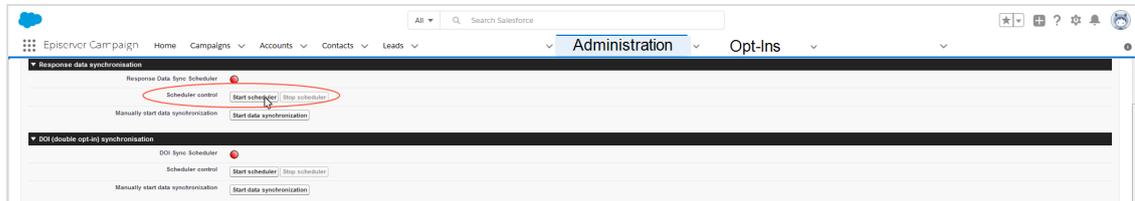
The **Start scheduler** button will be grayed-out when data synchronization is enabled. In addition, the icon next to **Response Data Sync Scheduler** will light up green.
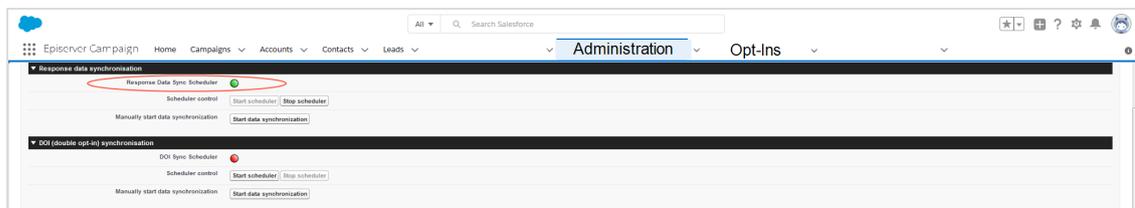
> **Tip:** Click **Stop scheduler** to interrupt synchronization of the deleted data sets. This may be necessary, such as if the configuration is faulty and you need to correct it.
>
> Click **Start data synchronization** under **Synchronize manually** to perform (one-time) manual data synchronization. A manual start allows you to limit the period of

> access between Salesforce and Episerver Campaign in the log files, thereby helping
> to diagnose any errors.

Viewing response data

After an mailing has been sent, the Salesforce add-on automatically imports the response data from your contacts and leads to your CRM. The detail pages of the CRM campaigns, campaign members, and contacts/leads provide you with access to the following data:

- Dispatch status of the mailing
- Openings
- Clicks
- Bounces
- Unsubscribes
- Direct replies

> **Note:** The response data of your contacts/leads is not transferred to Salesforce in real time. This data import may be delayed by several hours.

Microsoft Dynamics CRM integration

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

With the integration you can send campaigns from Microsoft Dynamics CRM via Episerver Campaign. Send large information volumes securely via email and SMS.

Add contacts and leads to a campaign, and use contact data for automatic personalized mailings in Episerver Campaign. Start campaign mailings in Microsoft Dynamics, and receive reports with sent and returned response data (opens, clicks, direct replies, outbounces and unsubscribes).

You can copy CRM (customer relationship management) marketing lists into Episerver Campaign recipient lists, and automatically include new CRM contacts in a Marketing Automation campaign to for example send welcome and birthday mailings.

Features and supported versions

Feature	Microsoft Dynamics 365	Microsoft Dynamics CRM 2016	Microsoft Dynamics CRM 2015	Microsoft Dynamics CRM 2013
Episerver Campaign management	✓	✓	✓	✓
Transfer of recipient data	✓	✓	✓	✓
Copy marketing lists into Episerver Campaign	✓	✓	✓	✓
Transfer of returned emails/response data	✓	✓	✓	✓
Synchronize unsubscribes and outbounces	✓	✓	✓	✓

Setting up the integration

To set up the Microsoft Dynamics integration for your clients, contact customer support to get the integration software package.

Provide Episerver with the following information:

- Your SOAP API user name in Episerver Campaign. If you do not have a SOAP API user account, customer support can create this. Use a separate email address for this, not used for logging into Episerver Campaign.
- Any additional CRM data in addition to the standard data you want to be transferred to the Episerver Campaign recipient list. See Configuring additional fields for the recipient list.
- The client IDs for the integration. To find this, open the start menu > Administration > API overview > SOAP API.
- The IDs of the corresponding recipient lists, if you want to synchronize marketing lists with Episerver Campaign. Alternatively, customer support can create new recipient lists. To find recipient list IDs, open the start menu > Administration > API overview > Recipient lists.

See Troubleshooting and maintenance if there are issues with the integration.

These instructions apply to the Microsoft Dynamics 365 online version. Procedures are similar for on-premises versions.

Installation

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to install the Microsoft Dynamics CRM integration, if you are using this with Episerver Campaign.

Installing the software package

1. Install the software package you received from [customer support](#) in Microsoft Dynamics CRM.
2. Log in to Microsoft Dynamics CRM with administrator rights.
3. Open the settings and click **Solutions** in the **Customization** menu.
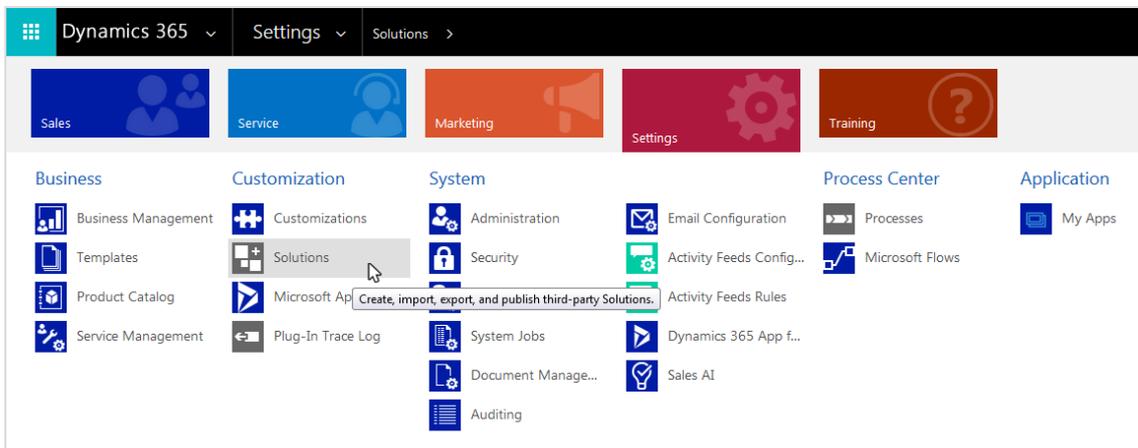
4. Click **Import** and select the file to upload.
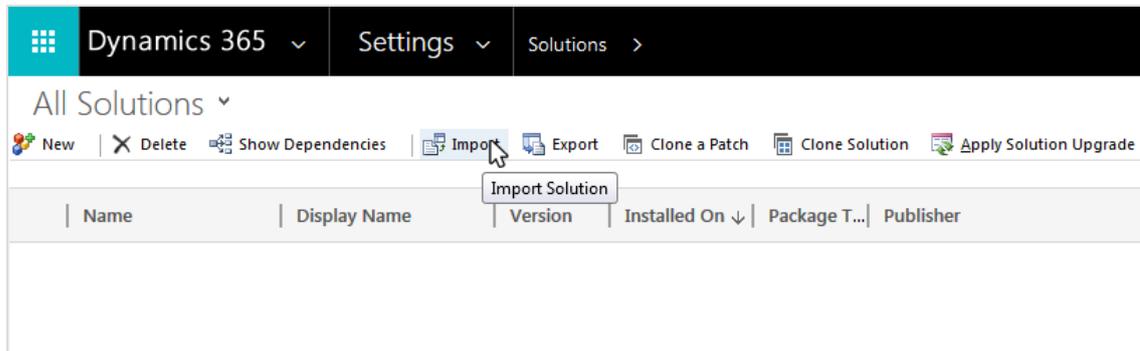
5. Select the compressed software package ZIP file and click **Next**. When uploaded, package information including name, publisher, and type is displayed.
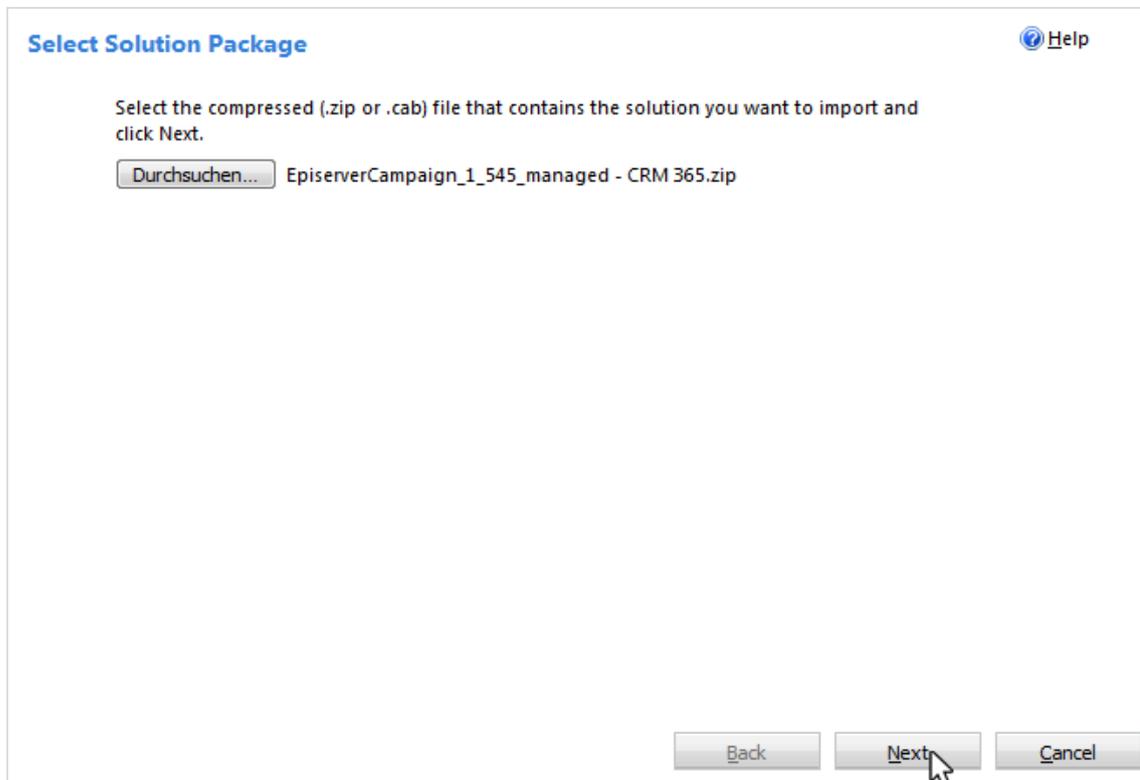
6. Click **Next**.

7. Select **Enable any SDK message processing steps included in the solution**.
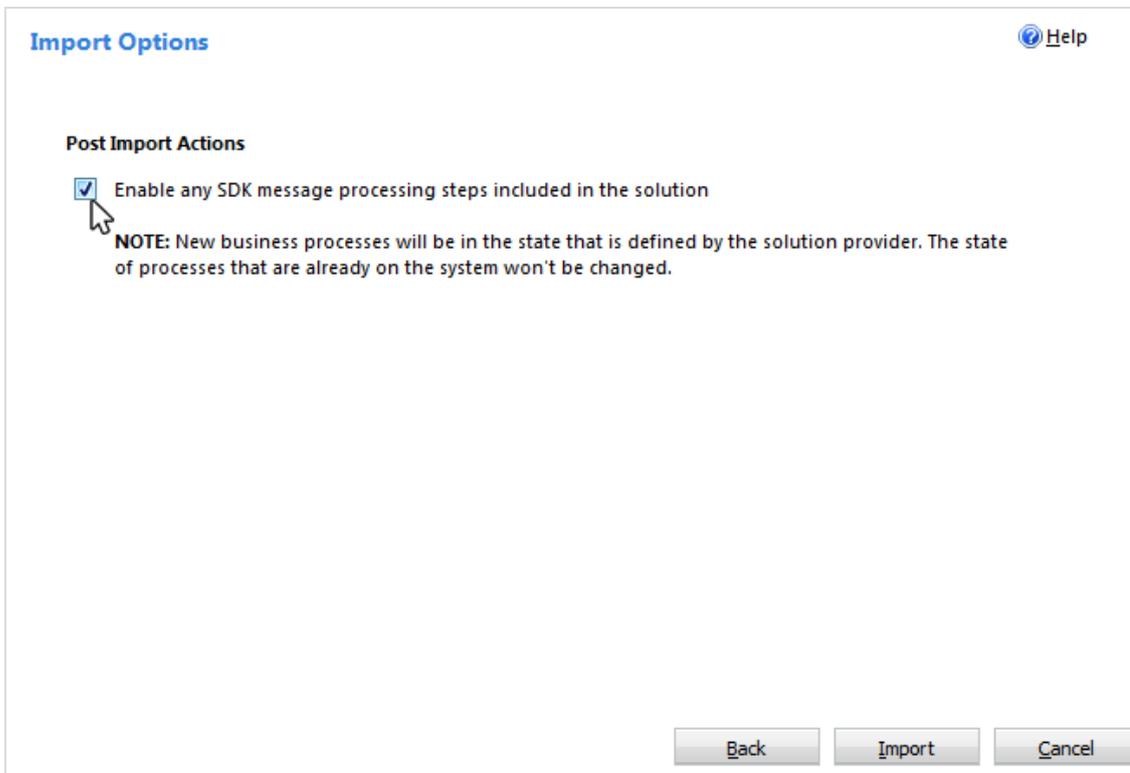
8. Click **Import**. When completed you can download the log files. The CRM settings now has an additional **Episerver Campaign** area.
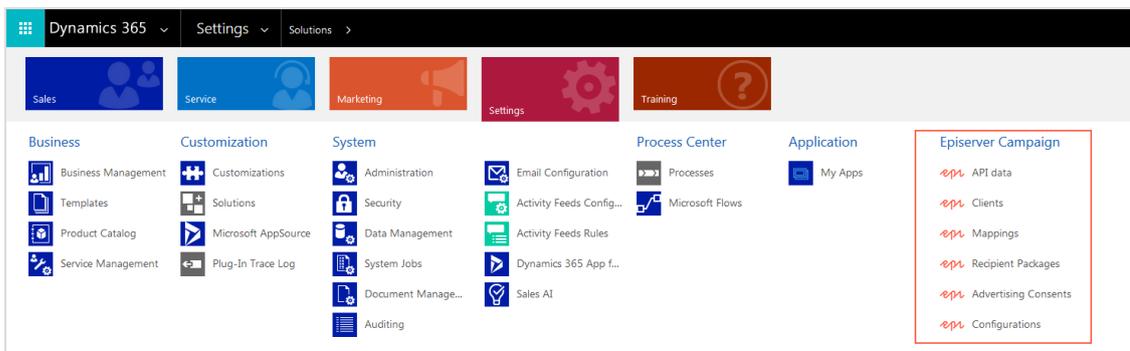
The integration provides two CRM roles:

- **Episerver Campaign Administrator**. For administering the integration and modifying settings.
- **Episerver Campaign User**. For working with campaigns via Episerver Campaign.

Installing an update

The difference compared to an initial installation is that you will be notified that the uploaded file is an update for an installed solution. To keep your integration settings, user accounts, passwords, and response data, activate the option **Maintain customizations (recommended)**.

Extended recipient list connector

The current version of Microsoft Dynamics 365 cannot address more than 100,000 recipients per campaign. The extended recipient list connector for Episerver Campaign is an external Windows service that lets you avoid this limitation. Contact customer support for the installation file and further documentation.

Configuration

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to set up the Microsoft Dynamics CRM integration, if you are using this with Episerver Campaign.

The configuration includes these steps:

1. Enter SOAP API user data.
2. Enter client IDs.
3. Start response data workflows.
4. Create advertising consents and link to client.

To transfer fields not included in the standard configuration, you must also configure the additional fields for your Episerver Campaign recipient list.

Entering SOAP API user data

Communication and data exchange between Microsoft Dynamics and Episerver Campaign uses the SOAP API. To link CRM with Episerver Campaign via the interface, you must enter your SOAP API user data in Microsoft Dynamics.

> **Note:** If you do not have a SOAP API user account for the relevant client, contact customer support.

1. Log in to Microsoft Dynamics CRM with administrator rights.
2. Go to **Settings** > **Episerver Campaign** > **API data**. The integration adds a new **Episerver Campaign** section to your CRM (Customer Relationship Management) settings.
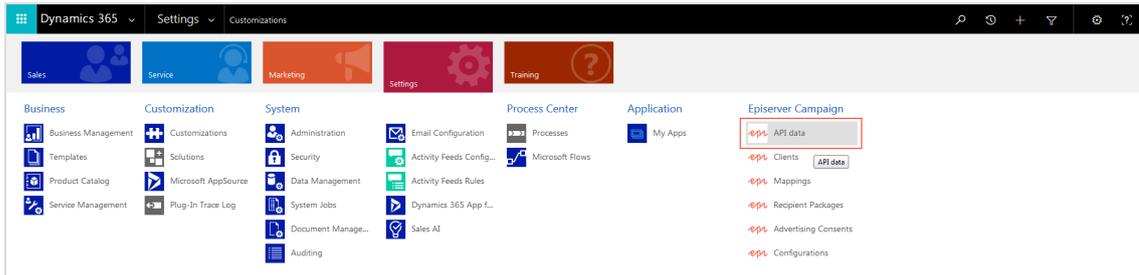
3. Click **New**.
4. For **API User**, enter your SOAP API user name.

5. For **API Password**, enter your SOAP API password.
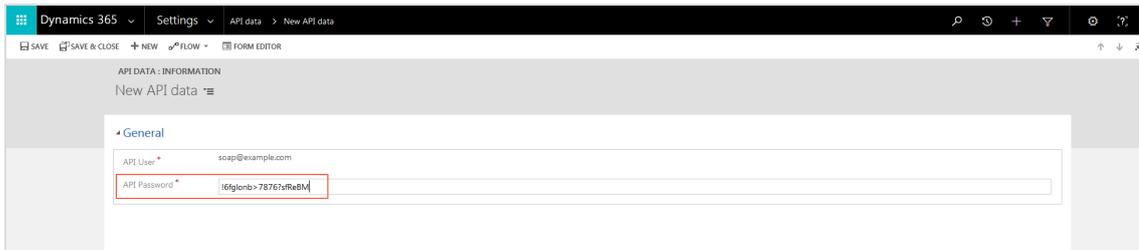
6. Click **Save & Close**.

Entering client IDs

To run campaigns, specify which Episerver Campaign client you want to use in CRM for sending.

1. Go to **Settings** > **Episerver Campaign** > **Episerver Campaign** > **Clients**.
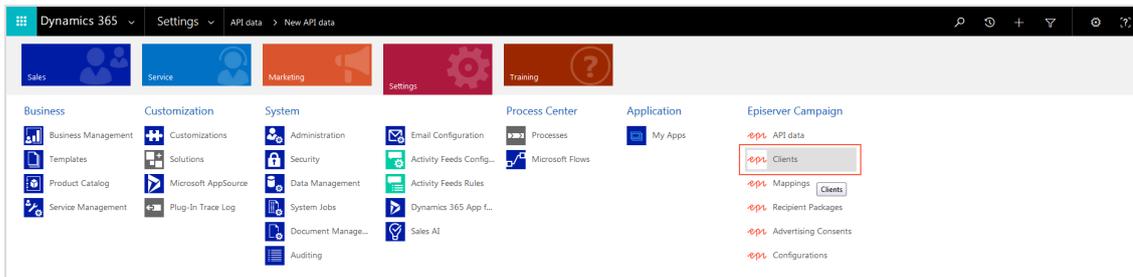
2. Click **New**.
3. For **Client ID**, enter the ID of the client to use for sending campaigns.
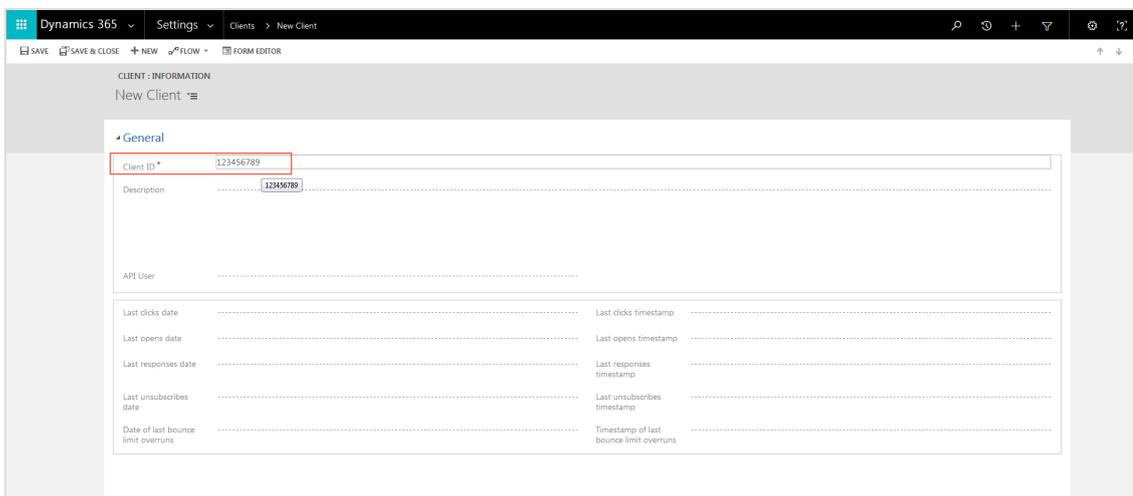
> **Note:** To see the client ID, open the start menu, select **Administration** > **API overview**, and open the **SOAP API** tab.

4. For **Description**, enter the name of the client.
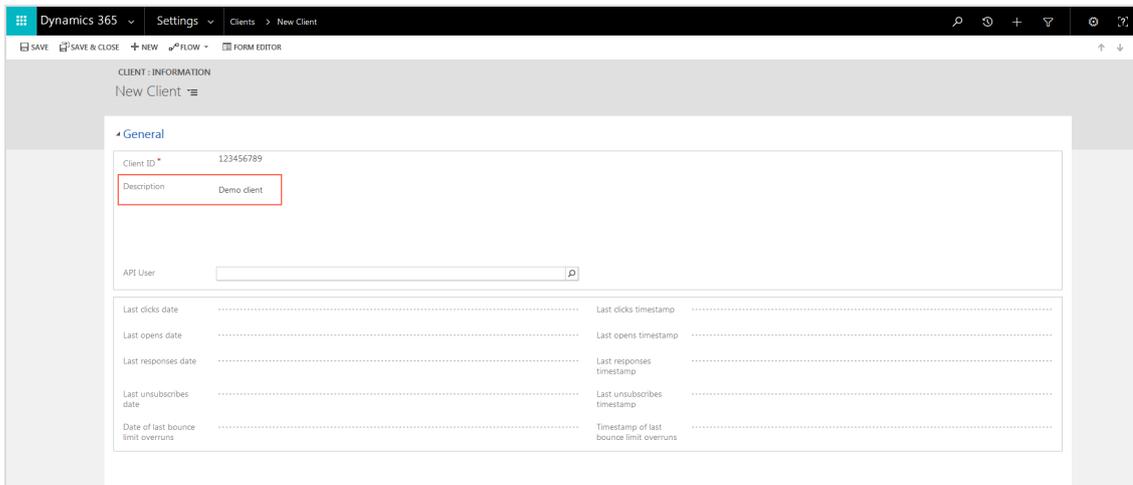
> **Note:** The name of client is displayed at top right in the menu bar in Episerver Campaign.

5. For **API User**, select your SOAP API user. See **Enter SOAP API user data**.
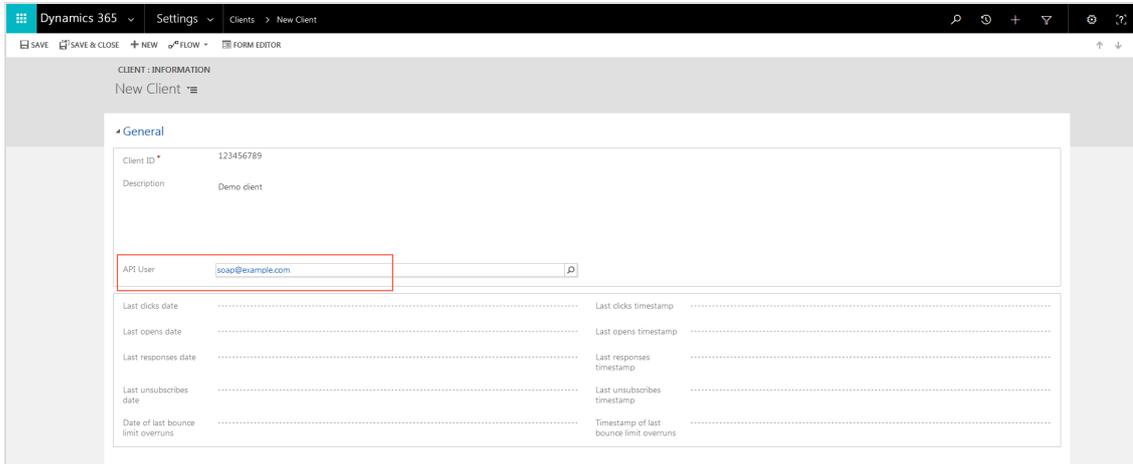
6. Click **Save & Close**. To add more clients, repeat the steps for each additional client.

Starting response data workflows

To feed campaign response data from contacts and leads in Episerver Campaign into CRM, start the response data workflows for each individual client. The workflows query and import recipient response data in 60-minute intervals.

These workflows are available for each response type:

Workflow	Response type
Episerver: Get opens	Mailing opened
Episerver: Get clicks	Link clicked in the mailing
Episerver: Get responses	Direct reply to the mailing
Episerver: Get unsubscribes	Newsletter unsubscribes
Episerver: Get outbounces	Outbounce (the recipient has exceeded the bounce limit)

Do the following to start workflows:

1. Select the clients to start workflows for. If the list of clients does not open, go to **Settings** > **Episerver Campaign** > **Episerver Campaign Clients**.
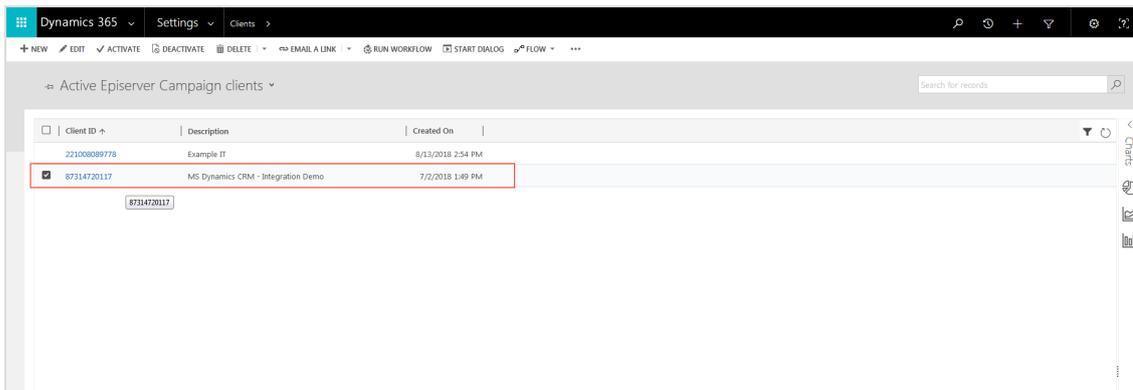
2. Click **Run Workflow**.
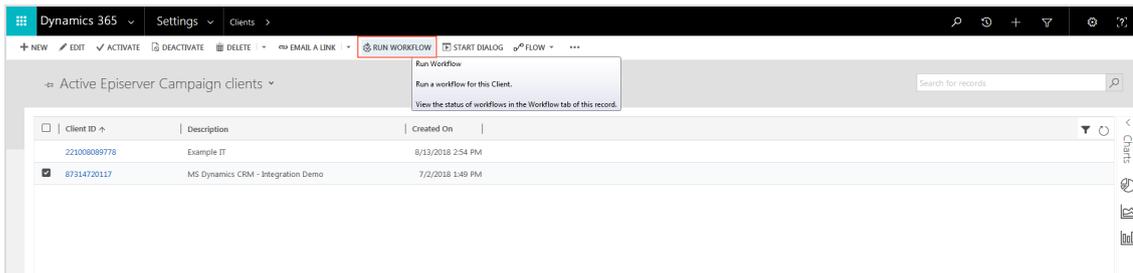
3. Select a workflow and click **Add**.
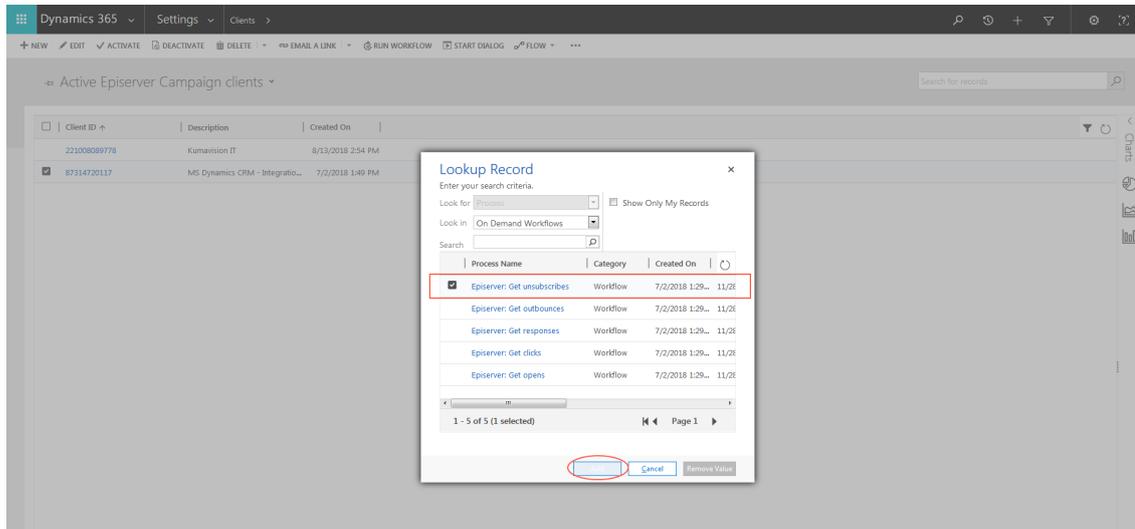
4. Click **OK** to confirm.
5. Repeat steps 1–4 for each workflow.

You can see workflow activity in the **Information** view for the client. Click the corresponding client ID in the list to open it. Under access data, you can see when the workflow was last run, and timestamp for the most recently imported data.

Creating consents and linking to client

To send mailings, you need advertising consent from contacts and leads. The consent protects recipients from unwanted omnichannel marketing. See also **Opt-in**. The integration checks two fields in Microsoft Dynamics for each contact and lead, to see if consent is given or withdrawn, and will not transfer recipients without consent.

Furthermore, you record the **bounce status** for the contact, lead or account, which makes a statement about the functionality of the advertising agreement.

Perform the following steps:

1. Creating a bounce status field
2. Adding the bounce status field to a form
3. Creating advertising consent and associating the bounce status field

Creating a bounce status field

1. Log in to Microsoft Dynamics CRM with administrator rights.
2. Go to **Settings** > **Customizations**.
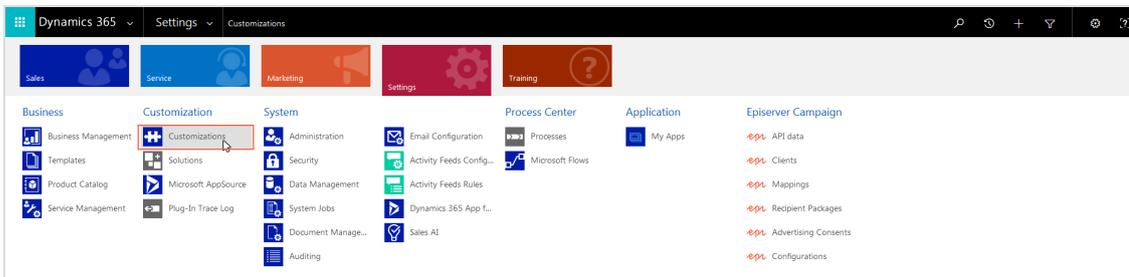
3. Click **Customize the System**.
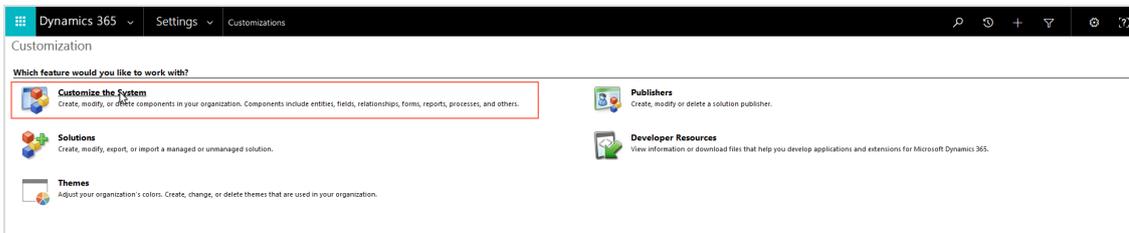
4. Use the side navigation to go to **Components** > **Entities** > **Contact** or **Lead** or **Account** > **Fields**.
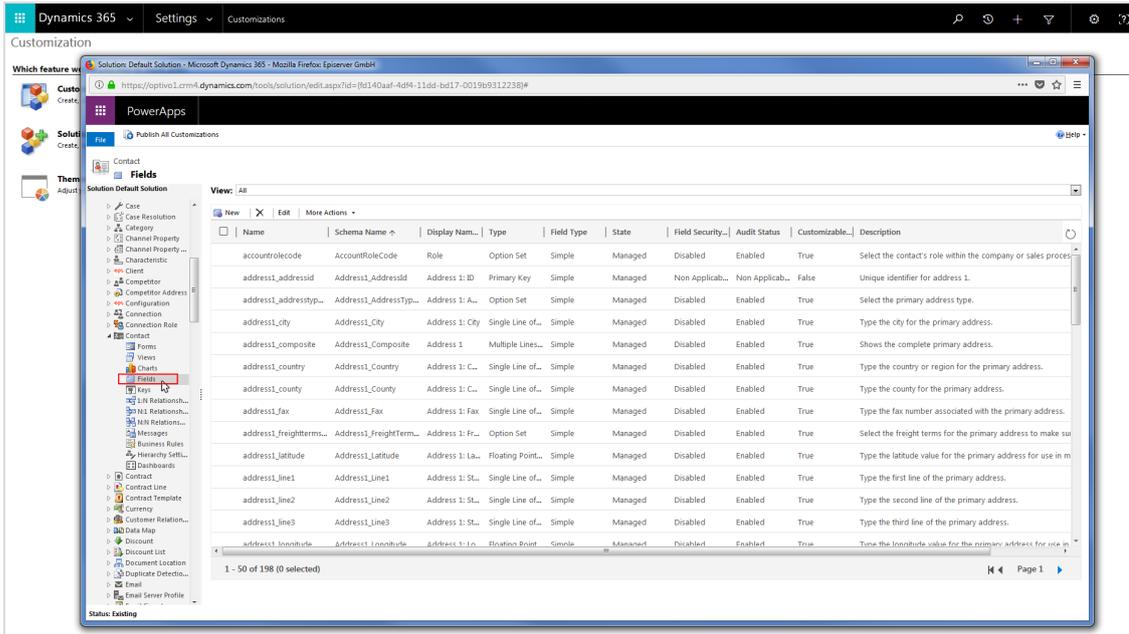
5. Click **New**.

6. Specify the following fields:

- **Display Name**. Enter an intuitive name, for example *EpiOutbounce E-Mail*.
- **Name**. Click into any other field. The entry is automatically copied to the **Name** box (without spaces or special characters), with the prefix *new_* added. Change the automatically created entry in the **Name** box, such as changing it to *new_epioutbounce eMail*. Do not use spaces or special characters. Note the entry in the **Name** box, you will need this later for the advertising consent.
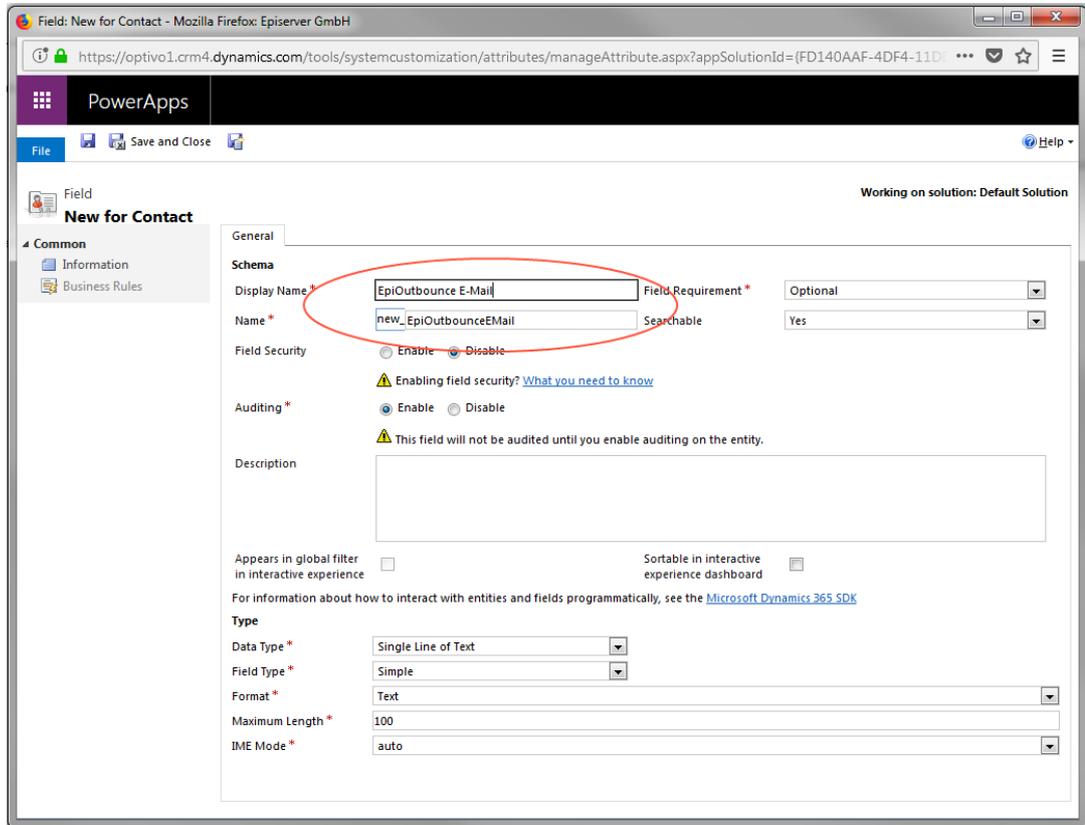
- **Field Requirement**: Select **Optional**.
- **Searchable**: Select **Yes**.
- **Field Security**. Select **Disable**.
- **Auditing**. Select **Enable**.
- **Description**. Optional: Enter a field description.

- **Data Type**. Select **Two Options**. A field containing the options **No** and **Yes** appears.
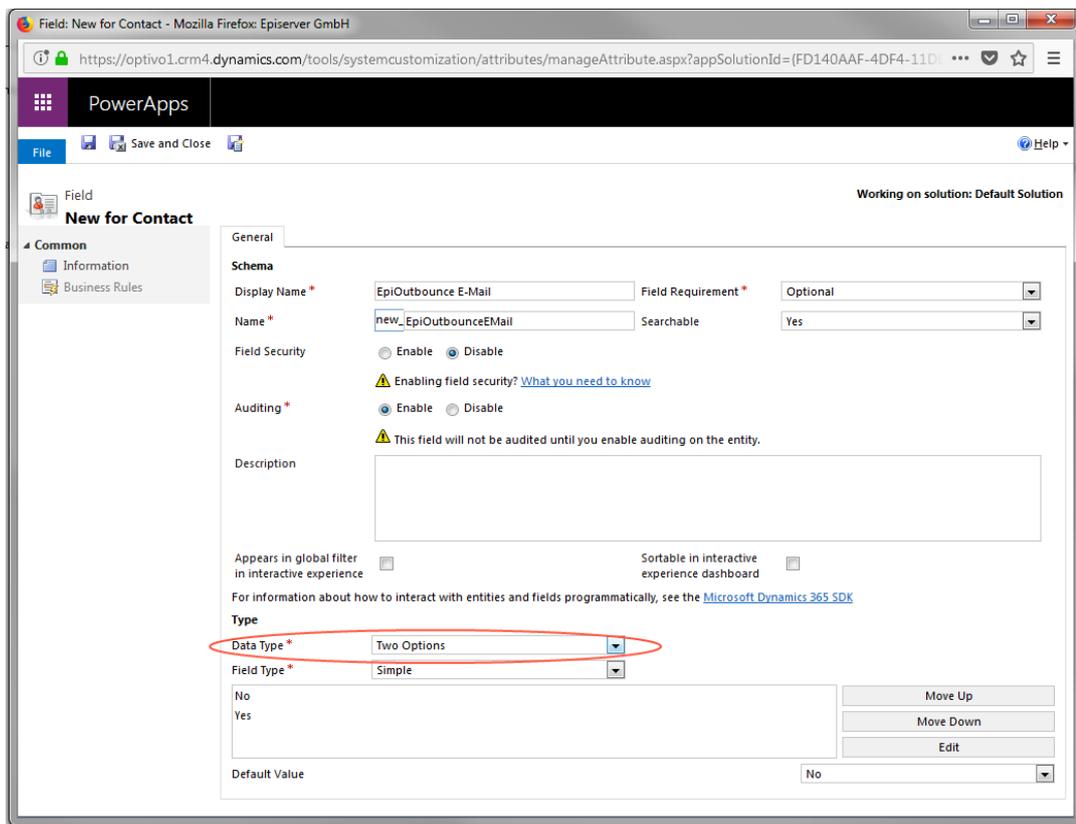
- **Field Type**. Select **Simple**.

7. Click **Save and Close**.
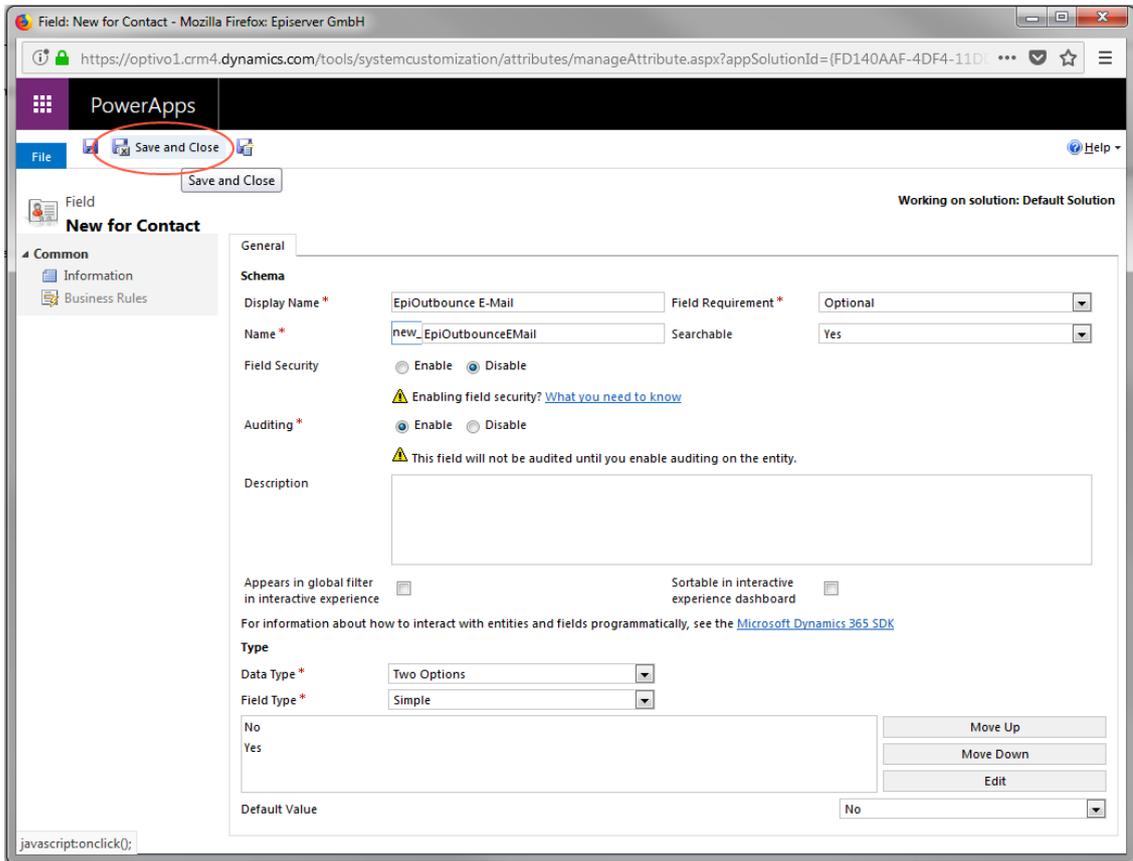
Adding the bounce status field to a form

1. Use the side navigation to go to **Components** > **Entities** > **Contact** or **Lead** or **Account** > **Forms**.
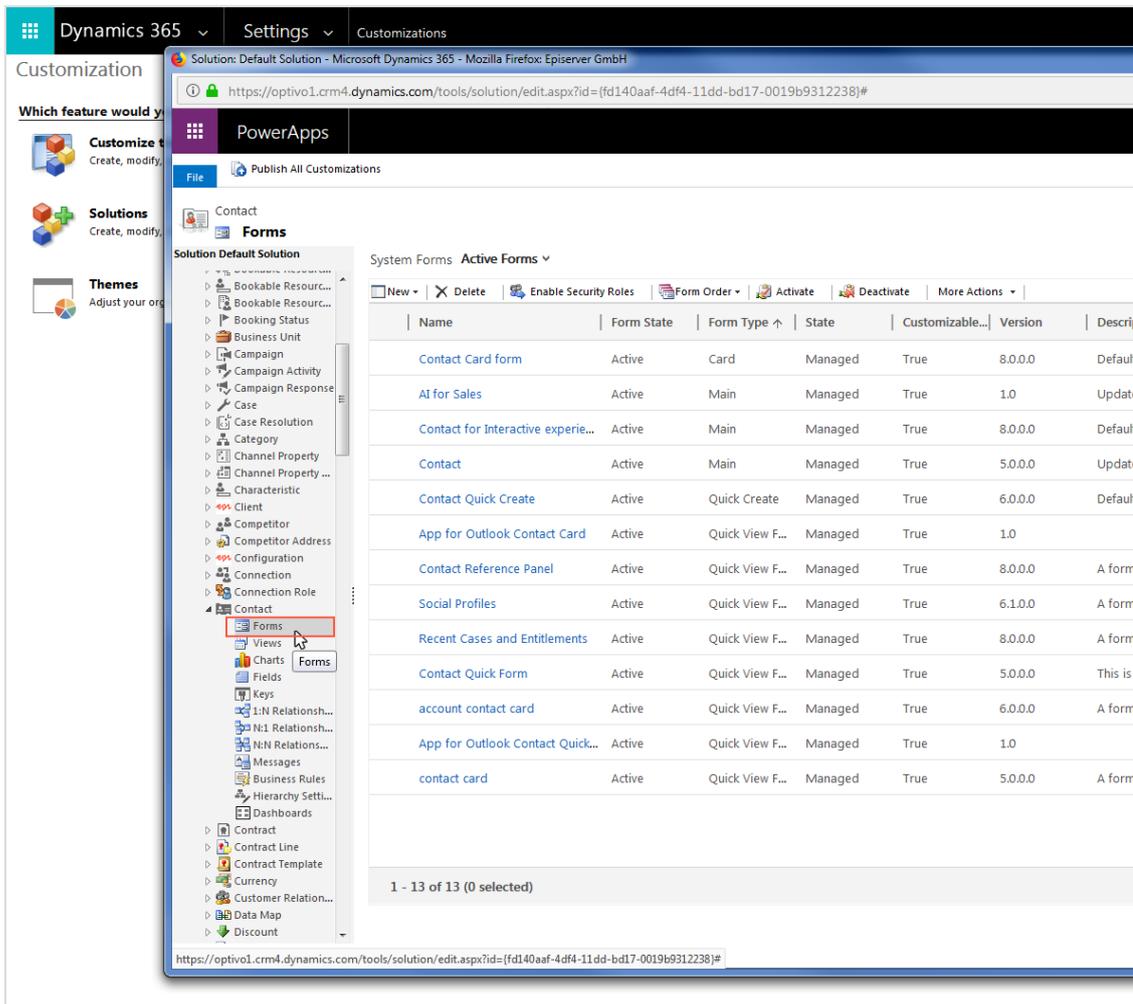
2. Click the form for which you want to add the advertising consent presence field.
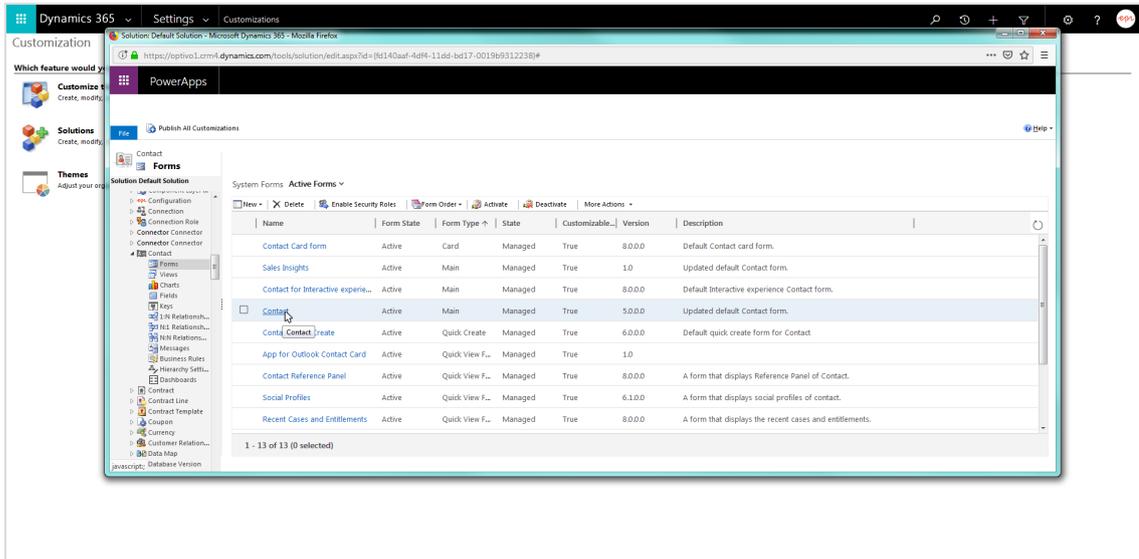
3. Click the area, for example **Marketing**, where the field for presence of advertising consent should appear. When the area is selected, the surrounding dashed line becomes solid.
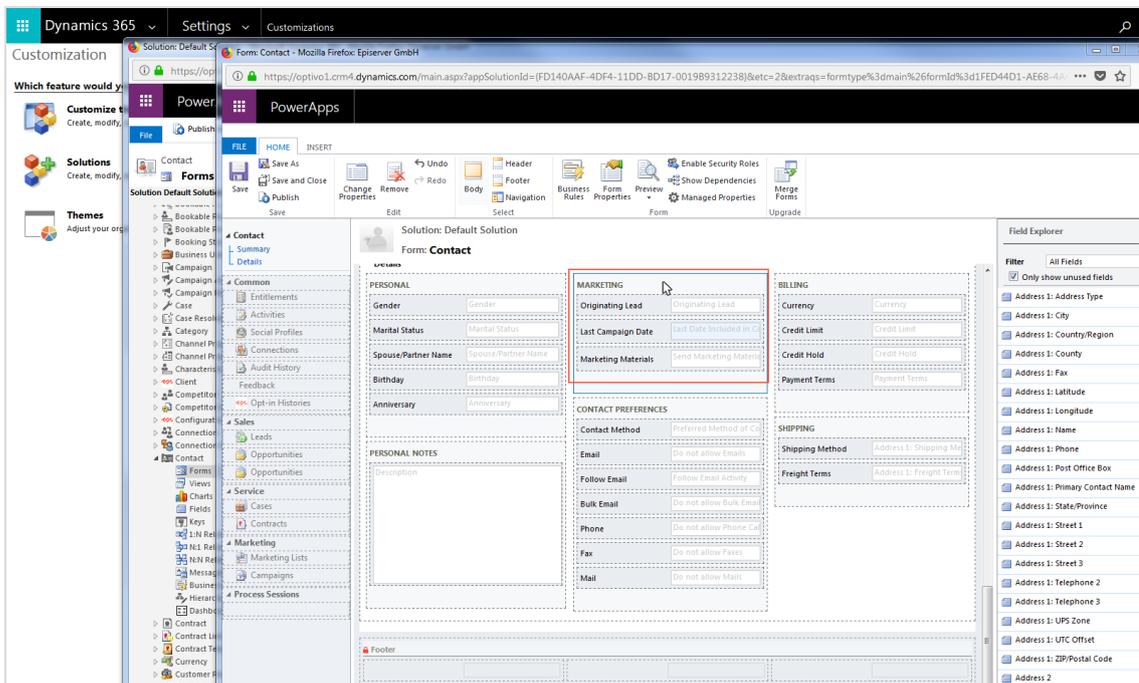
4. On the right, open the **Field Explorer** and browse for the field you created for the advertising consent presence.

Tip: You can filter the number of fields shown.
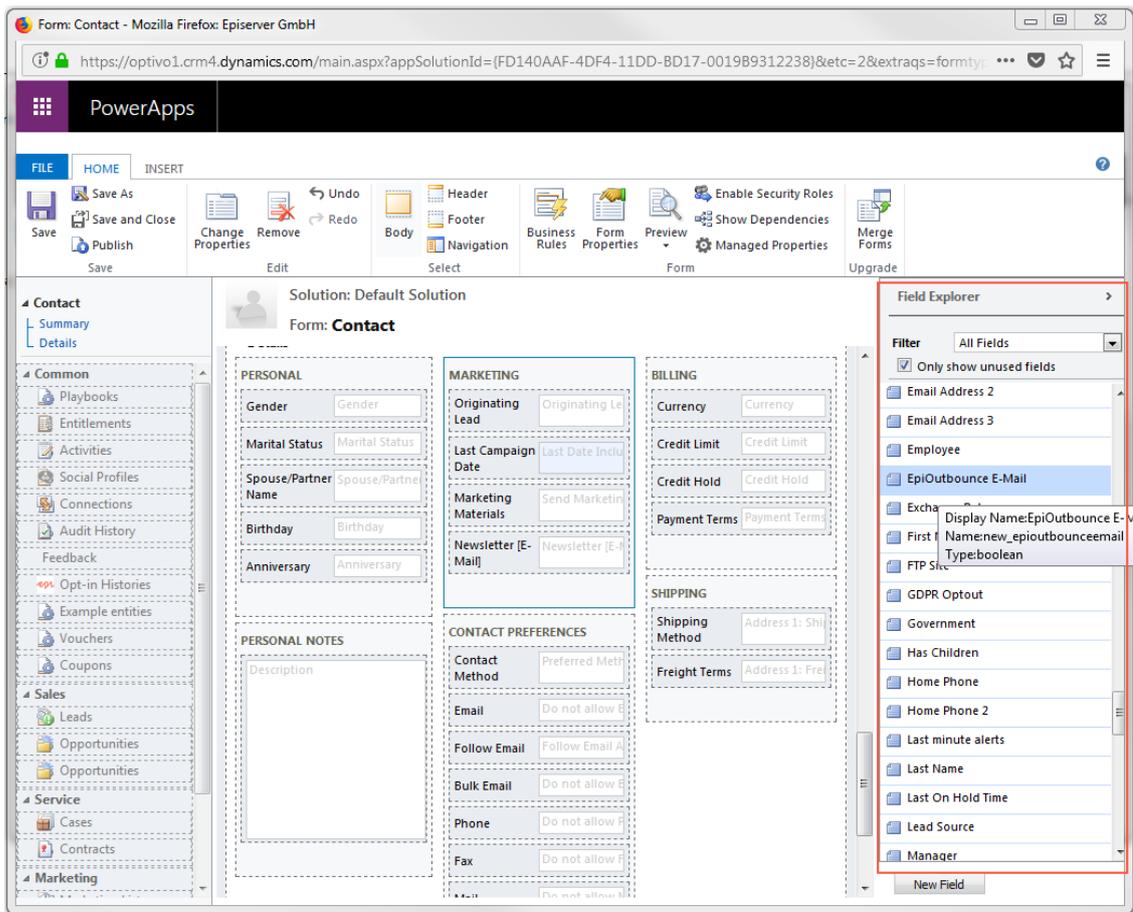
5. Double-click the advertising consent field to add it to the selected area.
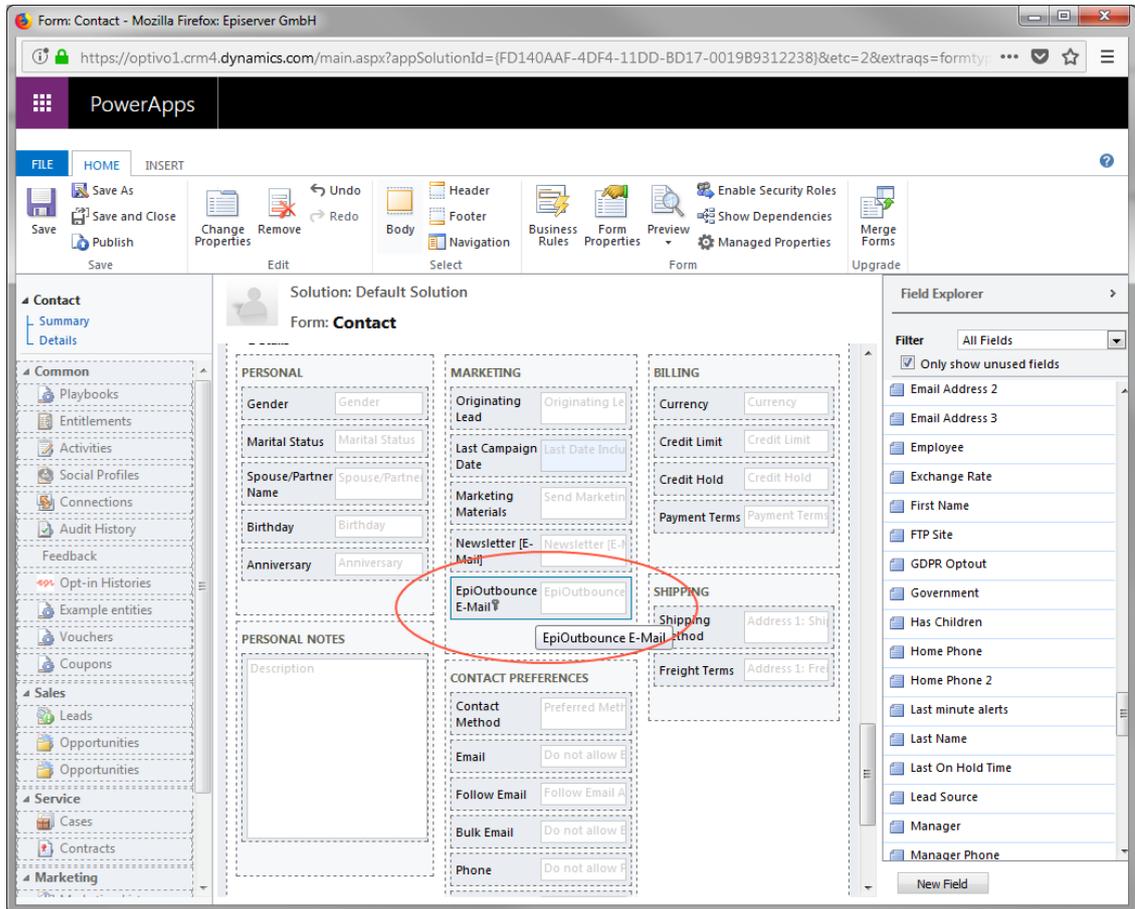
6. Click **Safe**.

7. Click **Publish**.

Creating advertising consent and associating the bounce status field

1. In Microsoft Dynamics, go to **Settings** > **Episerver Campaign** > **Advertising Consents**.
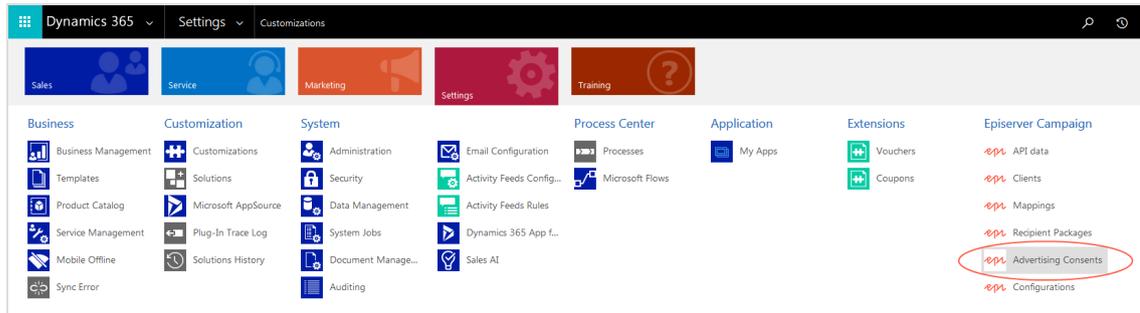
2. Click **New**.
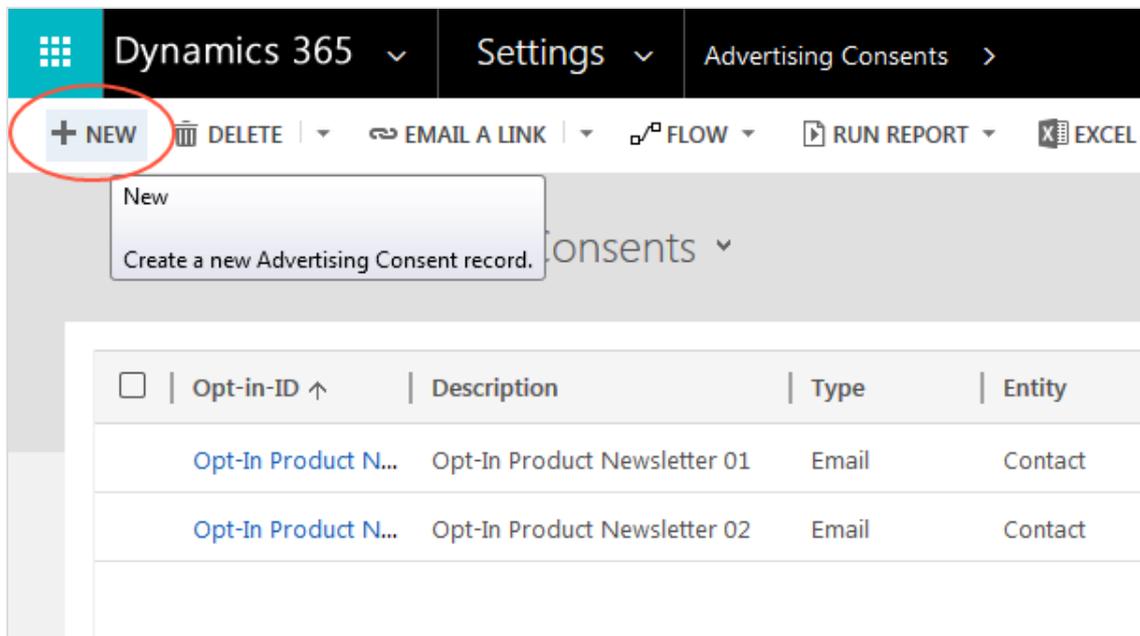
3. For **Opt-in-ID**, enter a unique identifier. Do not use special characters or characters with accents. The Opt-in-ID should be intuitive, for example *OptinProductNewsletterEmailContact*. It will display, for example, when selecting advertising consent for sending a campaign.
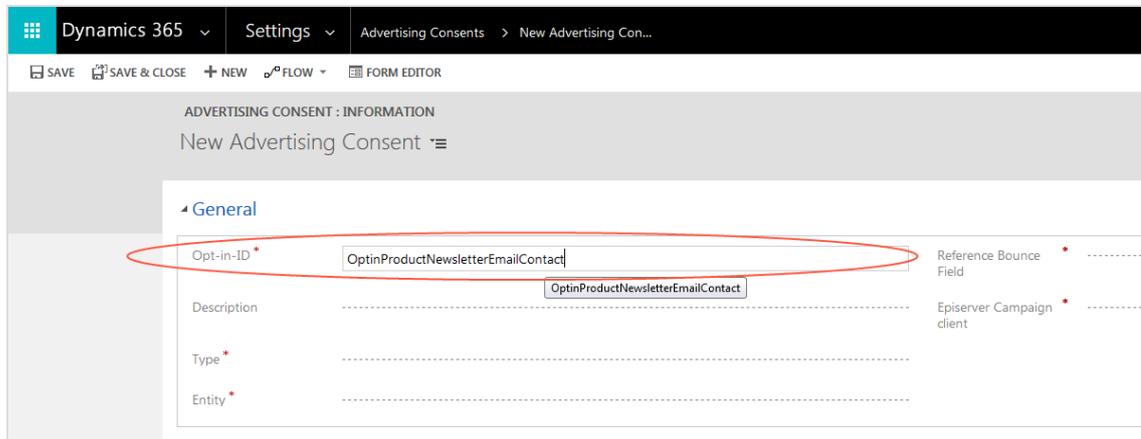
4. Optional: For **Description**, enter a description for the advertising consent.

5. For **Type**, select the communication channel (email, SMS) to which the advertising consent applies.
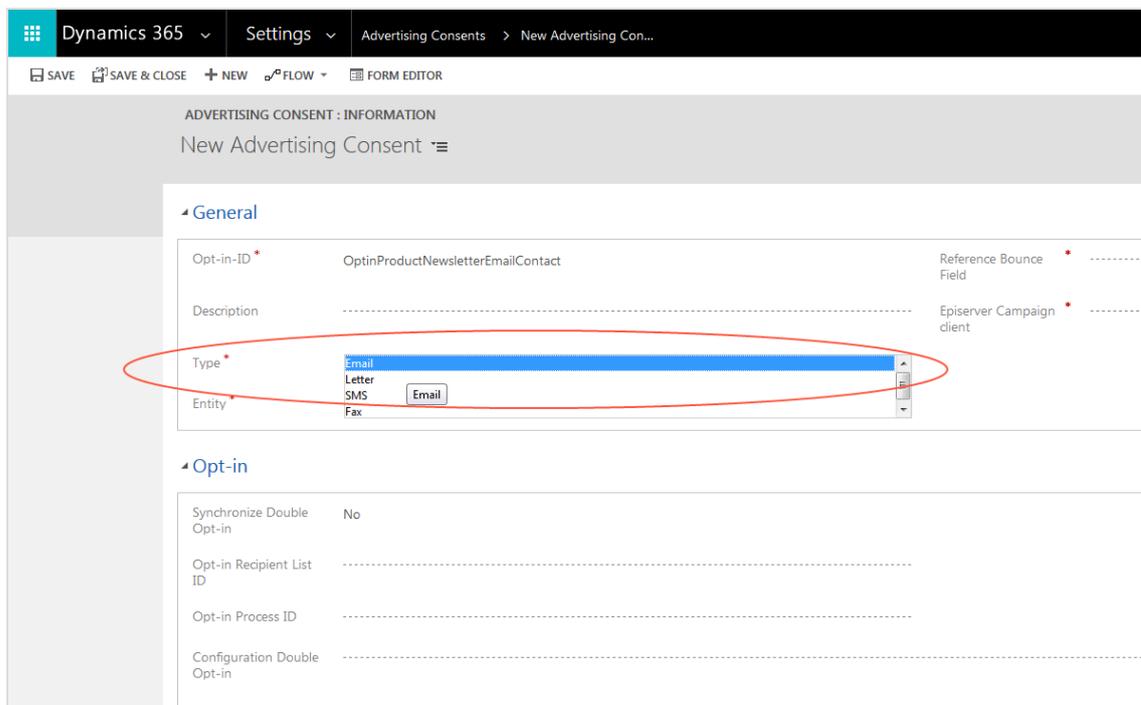
6. For **Entity**, select the customer type (**Contact** or **Lead** or **Account**) for which the advertising consent is used.

7. For **Reference Bounce Field**, enter the name of the field indicating the functionality of the advertising consent. This is the name that automatically had *new_* added when creating the field.

8. For **Episerver Campaign client**, select the client used for sending the advertising consent by clicking the magnifying glass symbol.

> **Note:** The allocation of a client to an advertising consent cannot be changed.
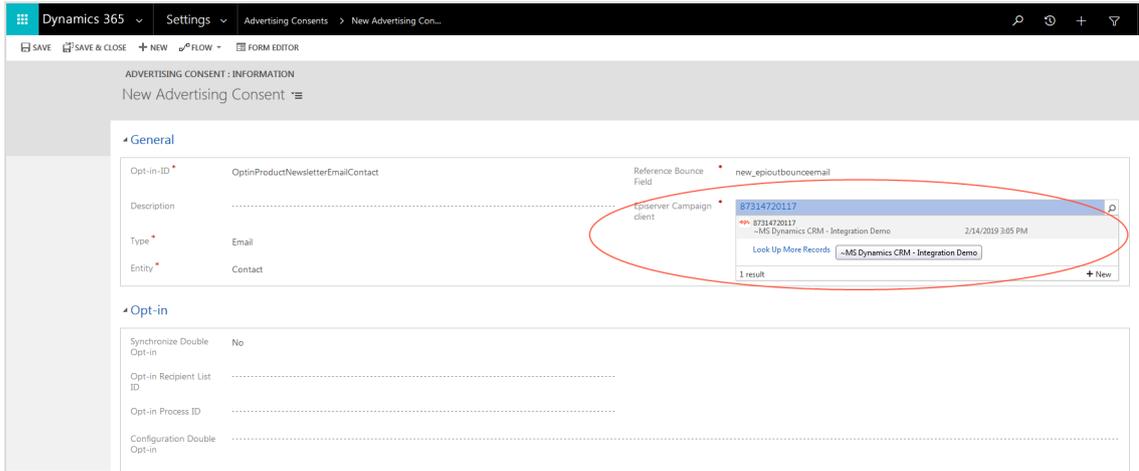
9. Click **Save & Close**. The new advertising consent is displayed in the overview list.
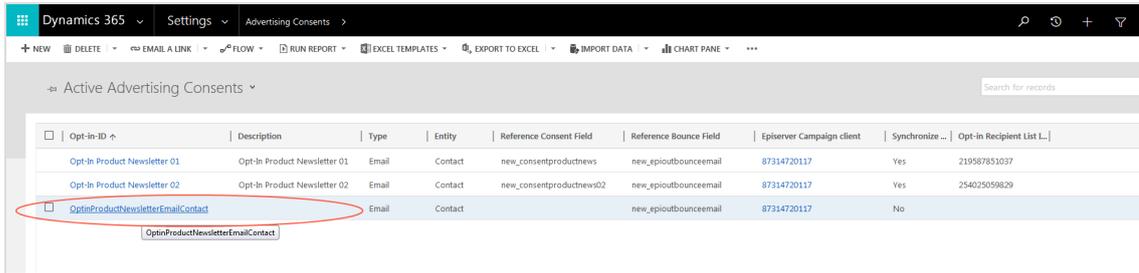
Repeat steps 1–9 to add more advertising consents for the same channel. Additional advertising consents can refer back to the bounce status field that was already created. This applies to the entire channel, for example an **Email** channel.

You have successfully created an advertising consent. Irrespective of whether the agreements are obtained through an opt-in process in Episerver Campaign or from another source, you will find the assignment of the advertising consents to the individual contacts, leads or accounts under the menu item **Opt-in Histories**.
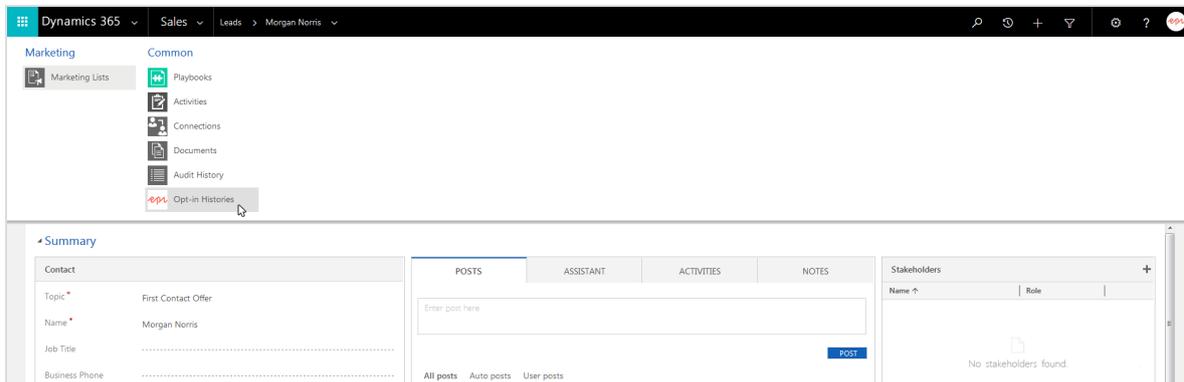
In the **Opt-in History Assigned View** overview, you can see the advertising consents granted. If the advertising consent is withdrawn again, the entry can be deleted, or an **Opt-out** entry is created on basis of the unsubscribe response data. In this case, CRM uses the time stamp to recognize the current status of the withdrawn advertising consent. In both cases, no more mailings that require the corresponding consent are sent to this data record.
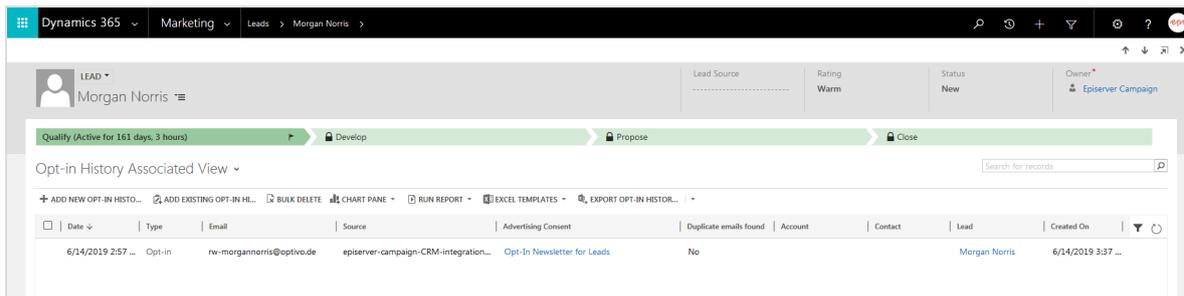
Connecting the advertising consent to an Episerver Campaign opt-in process

On the configuration page of the advertising consent, you find another **Opt-in** area where you can can connect the created advertising consent to the opt-in process in Episerver Campaign. This enables you to send opt-in mailings with a confirmation link via Episerver Campaign.

Prerequisites:

- You completed configuring the integration, including an advertising consent.
- You created an **opt-in process**. You require the ID of the opt-in process and the ID of the opt-in recipient list used in the process.

To connect an advertising consent to a double opt-in process:

1. In the **Opt-in** area, in the **Synchronize Double Opt-in** field, select **Yes**.
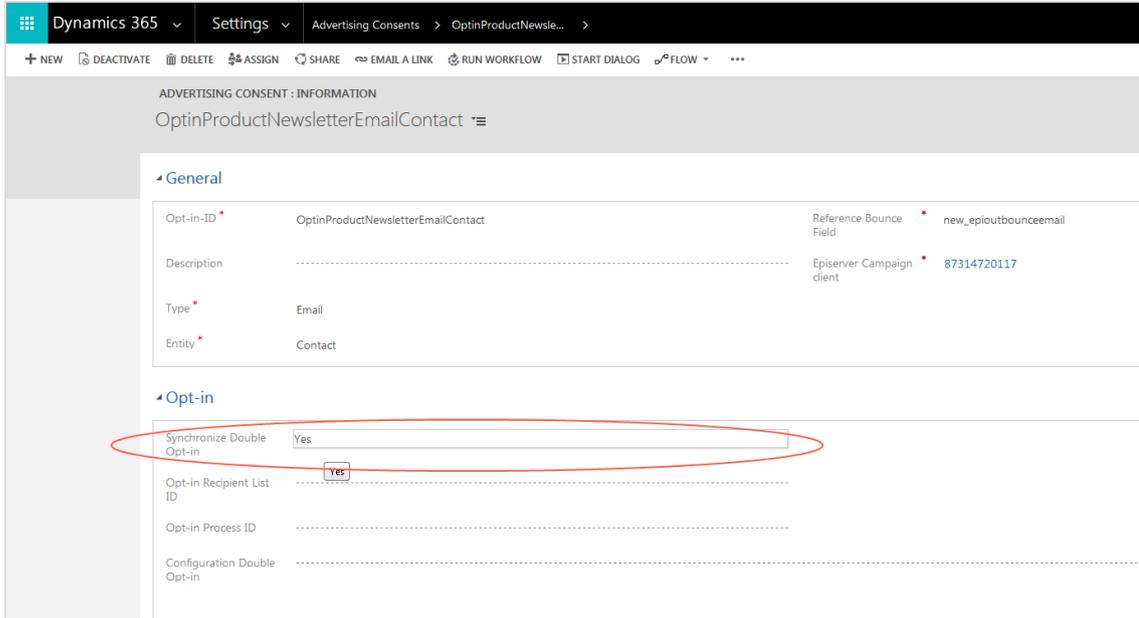
2. In the **Opt-in Recipient List ID** field, enter the ID of the recipient list that is used in the opt-in process. To see the recipient list ID in Episerver Campaign, go to start menu > **Administration** > **API overview** > **Recipient lists** tab.
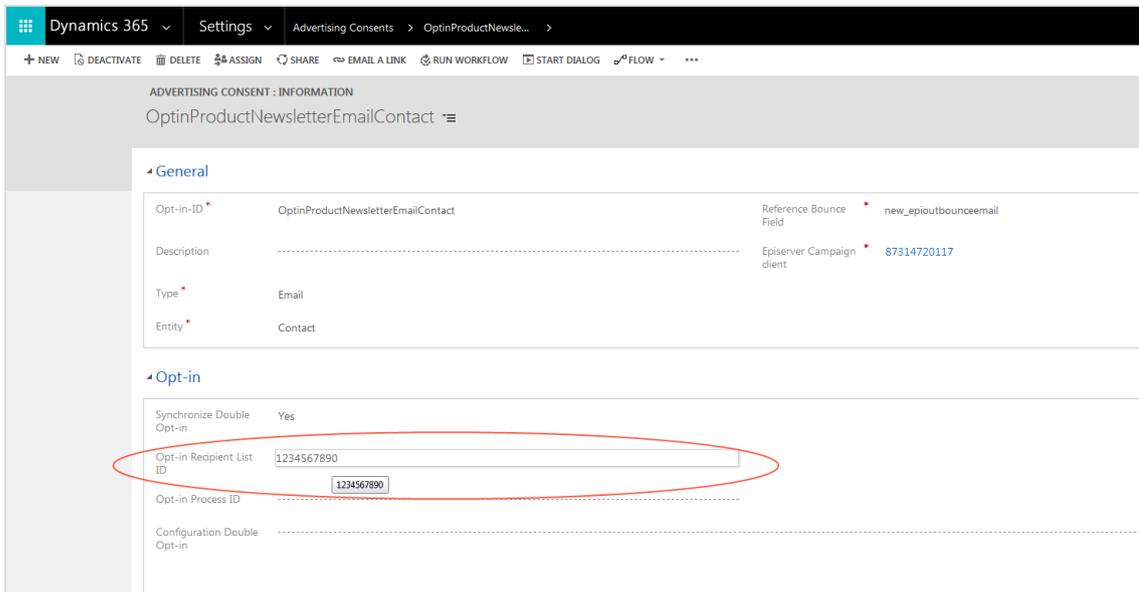
3. In the **Opt-in Process ID** field, enter the ID of the Opt-in process from Episerver Campaign. To see the opt-in ID in Episerver Campaign, go to start menu > **Administration** > **API overview** > **Opt-in processes**

tab.
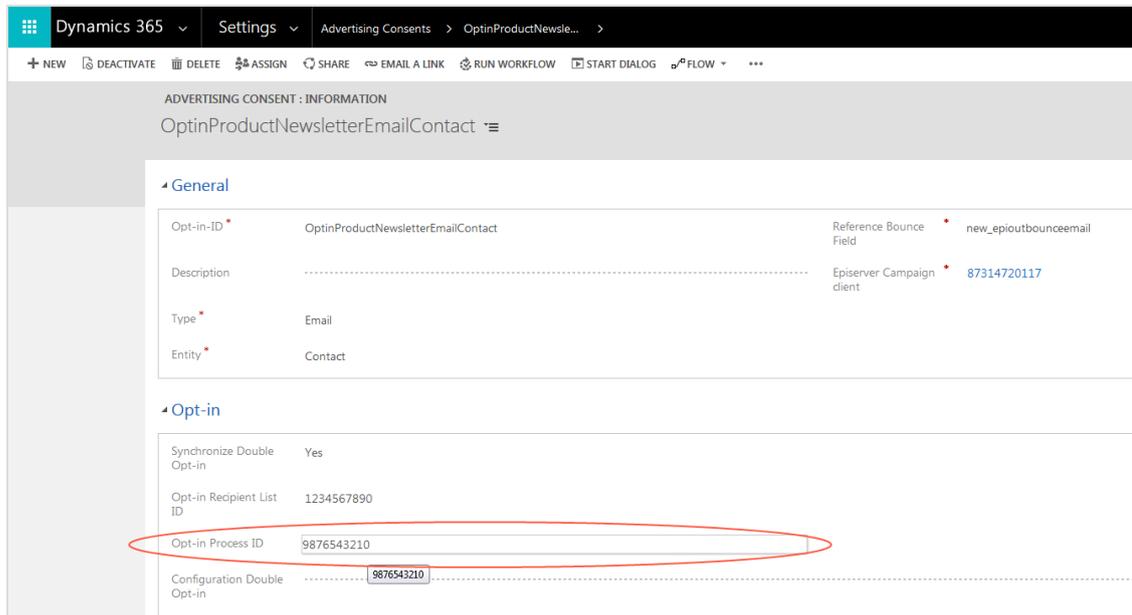
4. Optional: In the **Konfiguration DOI field**, enter a XML configuration that assigns information from the contact fields to the recipient list fields in the opt-in recipient list.

> **Note:** The entry in `<optinsource>` is freely customizable. Note that the root node is named `<episerver>` here.
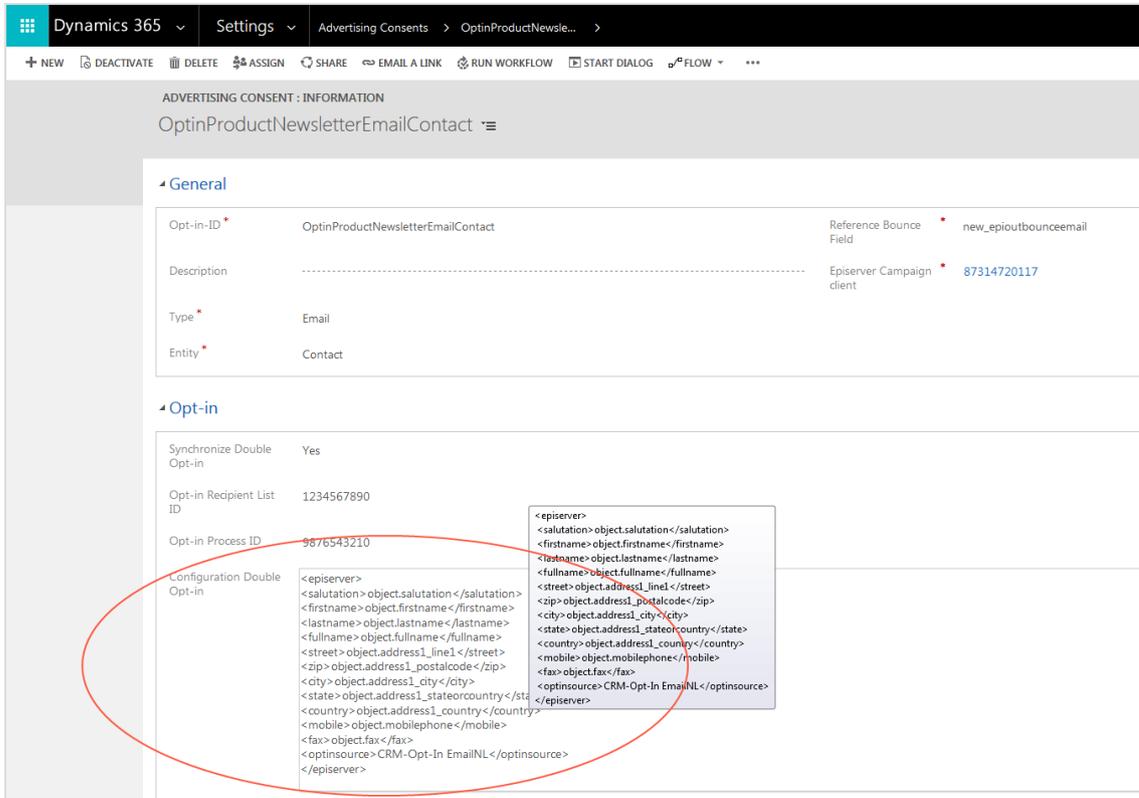
5. Click **Save & Close**.
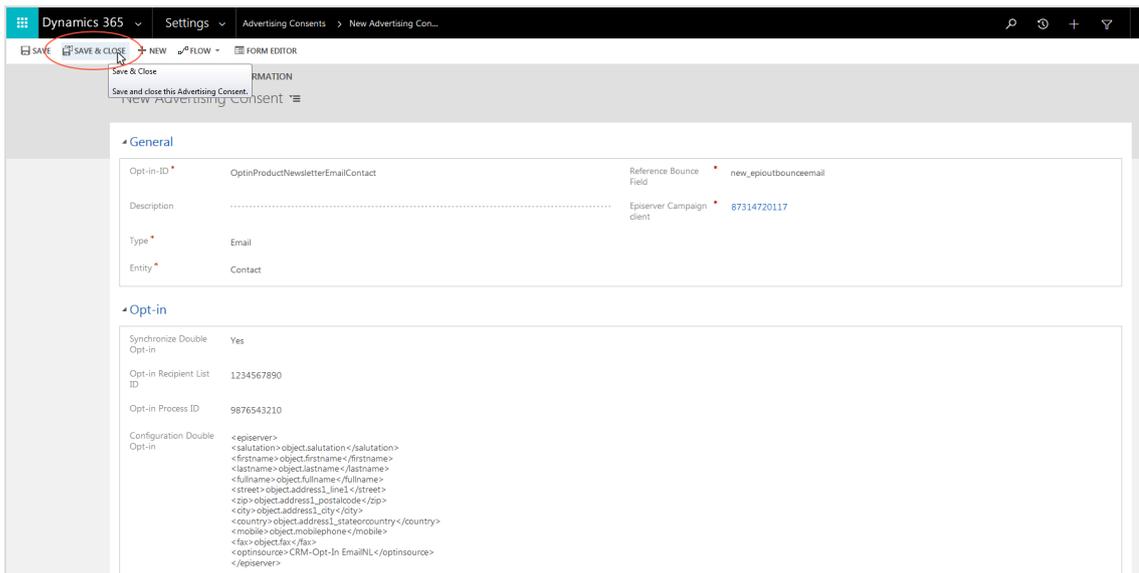
You have successfully combined an advertising consent in CRM with an opt-in process in Episerver Campaign. You can now trigger the sending of an opt-in mailing via Episerver Campaign by clicking the **Send Opt-in Mail** button in the respective entity.

Customizing the campaign activity form

To complete the configuration, update the campaign activity form adding fields from the Microsoft Dynamics integration. These fields are usually added when the integration is installed. However, depending on your CRM configuration, this step may have been missed.

The integration has these fields:

No.	Field name
1	Recipients sent to Episerver Campaign
2	Sent successful
3	Recipient Packages created
4	Mailing Description
5	Mailing ID
6	Mailing ID by Wave ID
7	Mailing name
8	Mailing Status
9	Episerver Campaign client
10	Recipient Packages sent
11	Preprocessed recipients
12	Wave ID

No.	Field name
13	Advertising Consent

Do the following:

1. In Microsoft Dynamics, go to **Settings** > **Customizations**.
2. Click **Customize the System**.
3. Select **Components** > **Entities** > **Campaign Activity** > **Forms**.
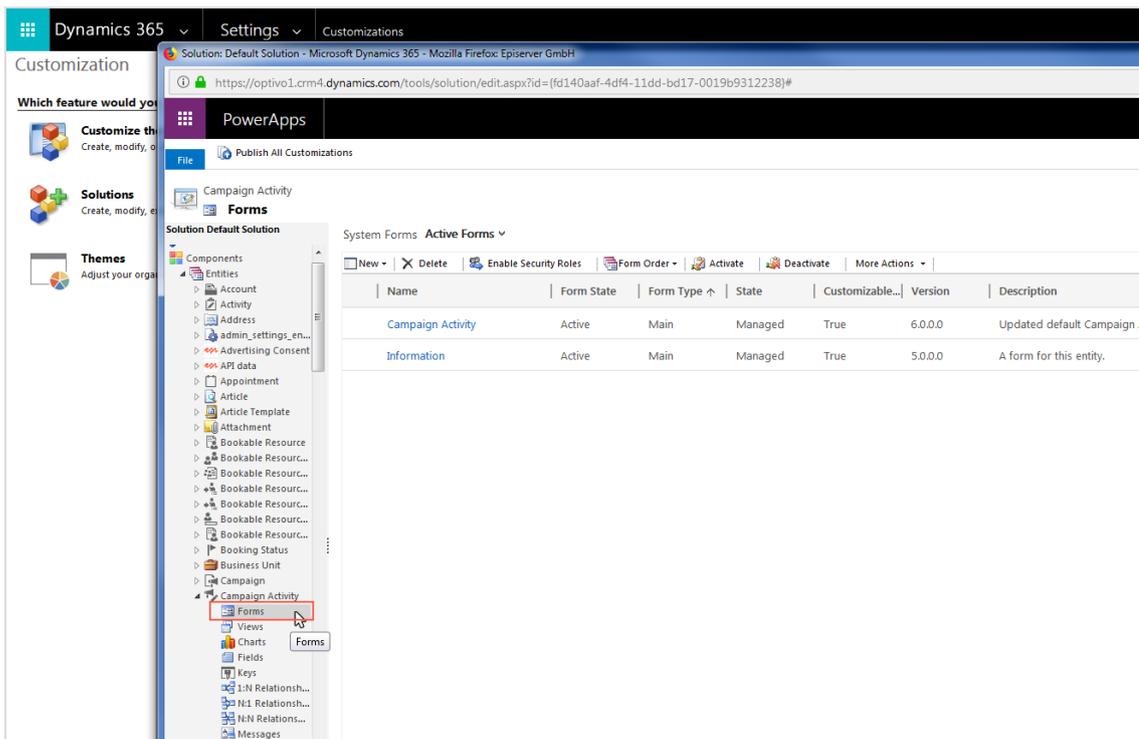
4. Click **Campaign activity** in the list to open the **Campaign Activity** form.
5. In the field explorer, from the **Filter** drop-down list, select **Custom Fields** and clear the **Only show**

unused fields check box. The 13 fields from the Microsoft Dynamics Integration are shown.
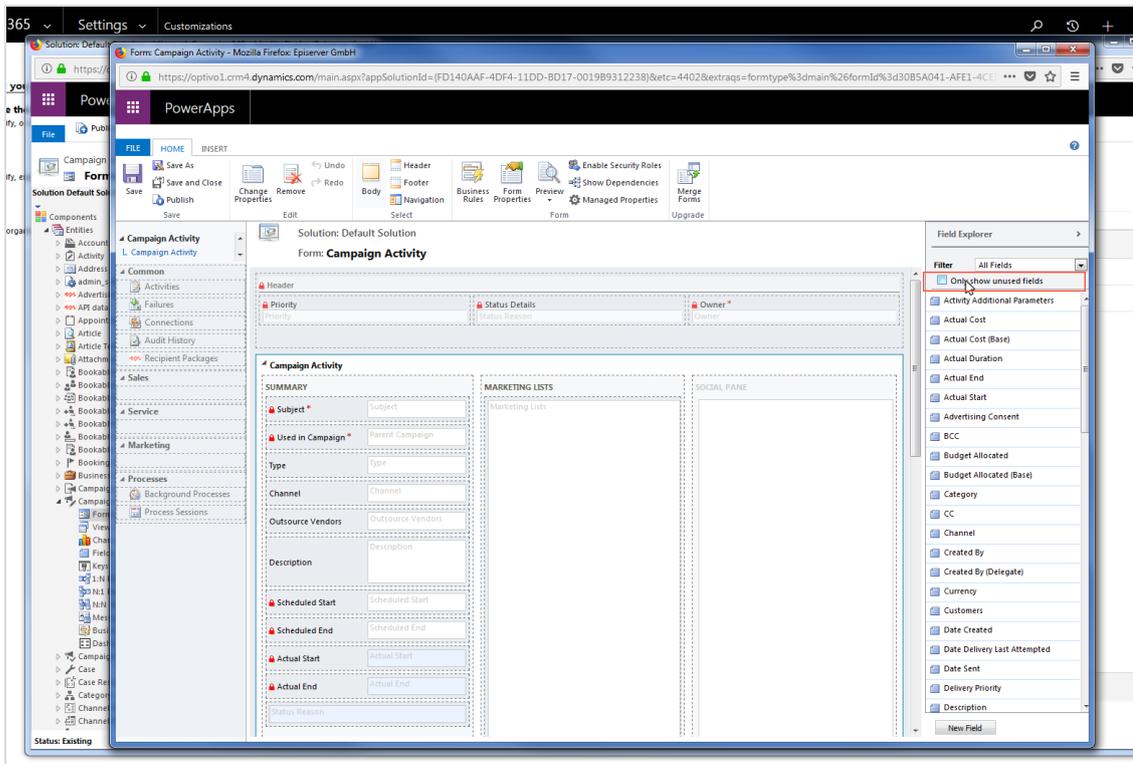
6. Drag the 13 fields into the **Episerver Campaign** area of the structure view of the form.
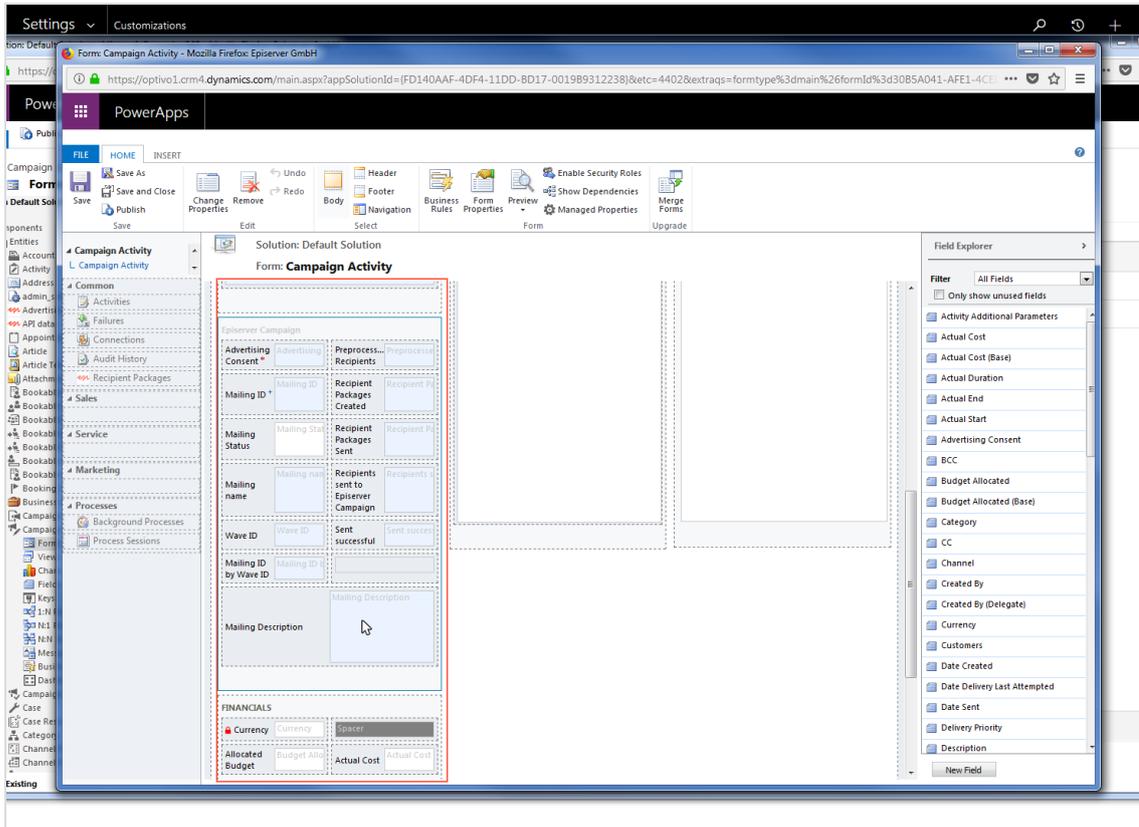
7. Click **Save and Close**.

Transferring data fields

When transferring data fields from the CRM to Episerver Campaign, a distinction is made between data fields transferred by default and additional optional fields that must be configured.

> **Note:** The integration transmits all values as a string, regardless of which data type is created in CRM.

Data fields transferred by default

The default settings for the integration send the following data from Microsoft Dynamics to Episerver Campaign:

Field name	Date type	Description
entityType	String	Indicates whether this is a lead or a contact
salutation	String	Title
firstname	String	First name
lastname	String	Last name
fullname	String	First name and last name
mobile	String	Mobile phone number (required for SMS campaigns)
email	String	Email (required for email campaigns)
street	String	Street
city	String	City
state	String	State
zip	String	Zip code
country	String	Country

Configuring additional fields for the recipient list

This configuration applies to both campaign management and synchronization of recipient lists and advertising consents (clients). Remember to consider this during planning to avoid costly reconfiguration and additional work. The field configurations must be identical for both **leads** and **contacts**. Changing only one type will cause the other to fail to send.

Options for custom configuration of recipient lists:

- **Remap** a custom CRM field and write it to an existing standard field in the recipient list.
- **Transfer** a custom CRM field to an additional field not in the standard configuration of the recipient list .

Remapping CRM fields

1. In Microsoft Dynamics, go to **Settings** > **Episerver Campaign** > **Mappings**.
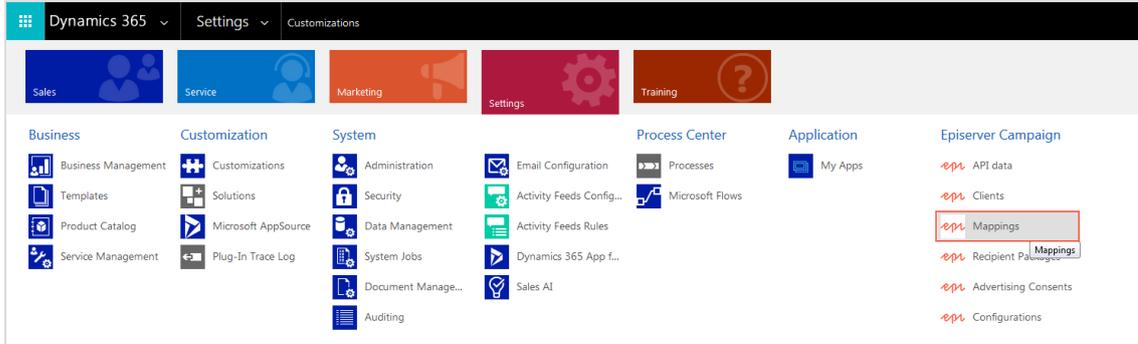
2. Click **New**.
3. For **Entity**, select the type **Contact**.
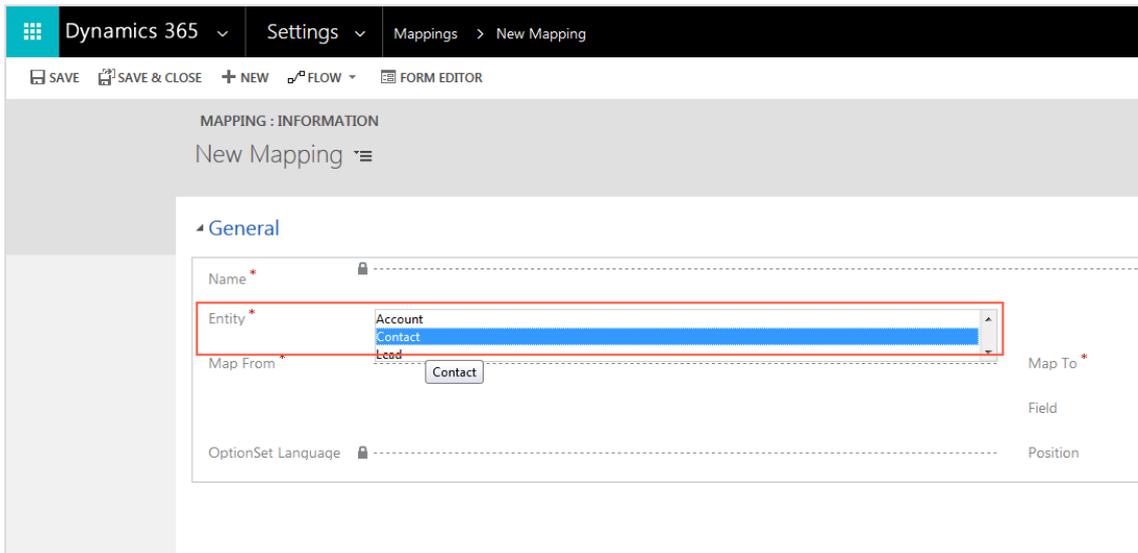
4. In the **Map From** box, enter the name of the field in CRM.
5. For **Map To**, select the standard field in the recipient list into which the value of the CRM field should be written. For example, if you created a field called *new_custom_country*, then you can copy the value of this field into the **Country** field in the recipient list. The standard CRM **Country** field is no longer transferred to Episerver Campaign.

6. Click **Save**.

Repeat steps 1–6 for type **Lead** (at step 3, select **Lead** under **Entity**).

Transferring CRM fields

Prior to transferring, contact **customer support** to add the additional fields to your recipient list. In the request, provide the fields in a consecutively numbered list starting at 1, including numbering and field names. Note the numbering and field names (do not change them), you will need these for the configuration.

Do the following when the fields have been added:

1. Go to **Settings** > **Episerver Campaign** > **Episerver Campaign Mappings** in Microsoft Dynamics CRM.
2. Click **New**.
3. For **Entity**, select **Contact**.
4. In the **Map From** box, enter the name of the CRM field.

5. For **Map To**, select **Custom**.
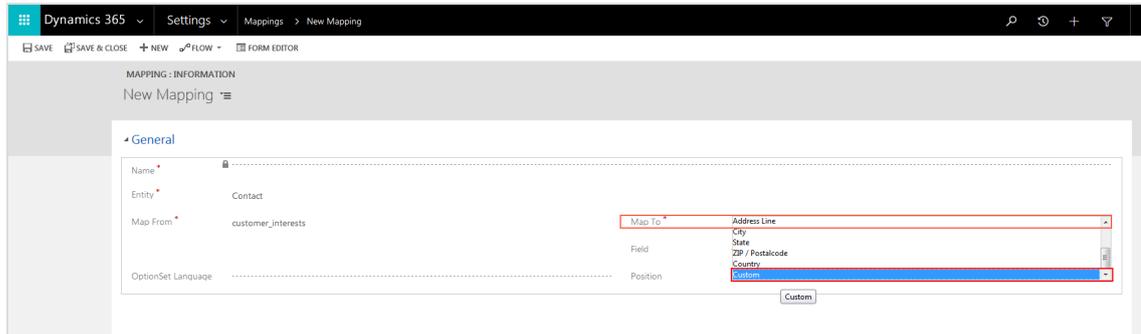
6. In the **Field** box, enter the name of the additional recipient list field requested.
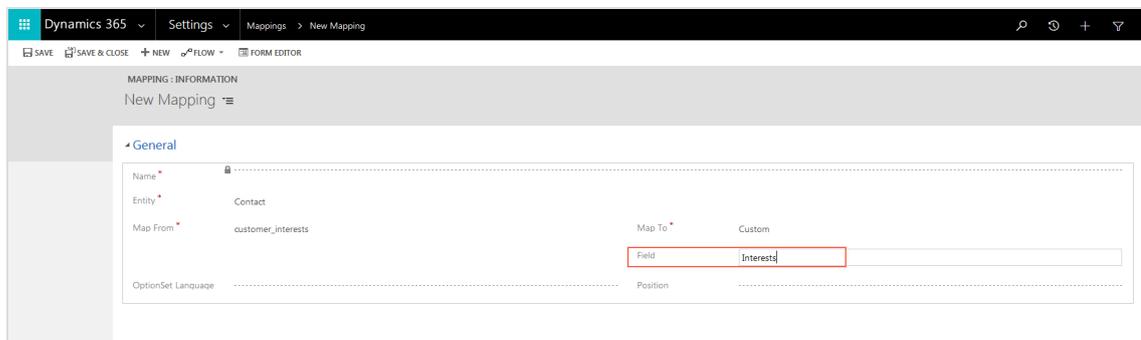
7. In the **Position** box, enter the position number of the additional recipient list field (the numbers you chose when adding the additional recipient list fields).
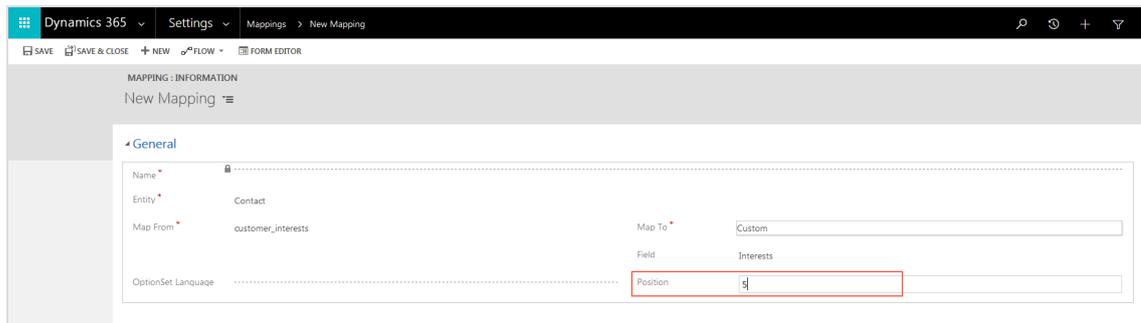
8. If the additional recipient list field is a drop-down list, then use **OptionSet Language** to select the language to use to transfer the values.

9. Click **Save**.
10. Repeat steps 2–10 for type **Lead** (at step 4, select **Lead** under **Entity**).

Sending mailings

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to send campaign mailings directly from **Campaign Activity** in Microsoft Dynamics CRM, when using this with Episerver Campaign. After the mailing is sent, response data (opens, clicks, direct replies, unsubscribes and outbounces) is automatically imported into CRM from Episerver Campaign.

Prerequisites

- **Configuration** of the integration completed. See Configuration.
- **Campaign mailing** prepared in Episerver Campaign. If you are using the closed-loop interface, add the **Wait** node to your campaign and select **Wait until import has been finished** so that mailings are only sent once the import of recipients is complete. See Smart Campaign nodes.
- The **ID of the campaign mailing** to be sent. Make a note of the mailing ID as this is required to send the mailing from CRM.

Configuring marketing lists and CRM campaigns

Before sending a campaign mailing via Episerver Campaign, you must do the following in Microsoft Dynamics CRM:

- Create a **marketing list** with leads and contacts who will receive the mailing.

  > **Note:** Contacts and leads for which you do not have **advertising consent** will not receive the mailing, even if they are in the marketing list.

- Create a **CRM campaign** and add the marketing list.

Creating a marketing list

1. In Microsoft Dynamics CRM, go to **Marketing** > **Marketing Lists**.
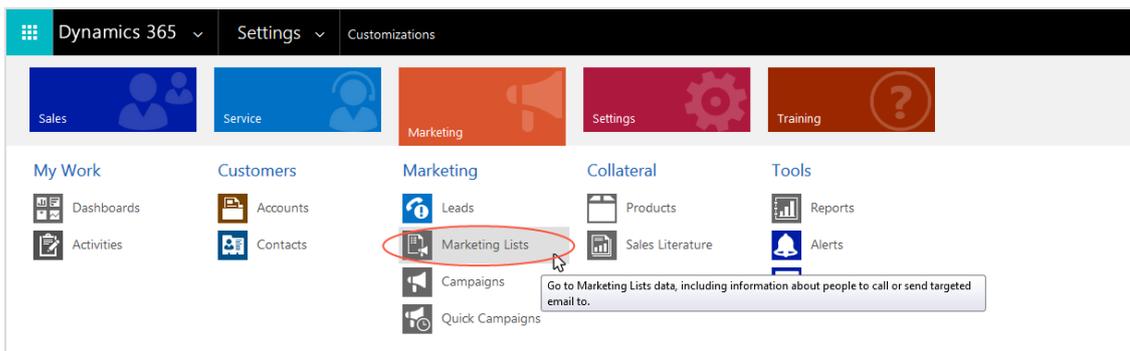
2. Click **New**. The integration supports both static and dynamic list types. The name for the marketing list and its options (such as **Currency**) are not relevant for sending mailings via Episerver Campaign.

3. When done, click **Save**.

4. Click the plus icon **+** for **Members** to add desired contacts or leads to the marketing list.
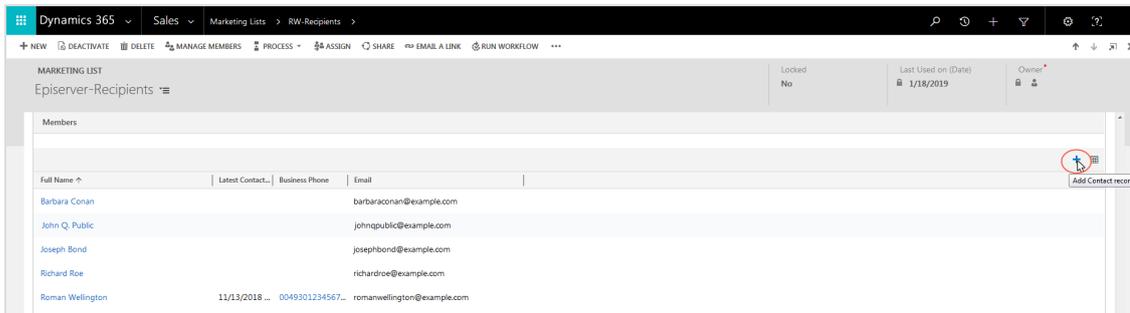
5. When done, click **Save**.

Creating a CRM campaign and adding the marketing list

1. In Microsoft Dynamics CRM, go to **Marketing** > **Campaigns**.
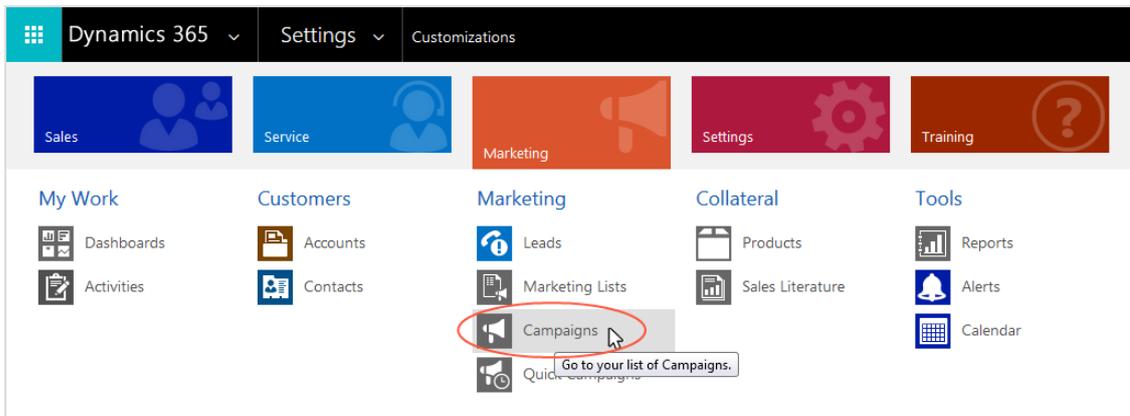
2. Click **New**.

3. In the **Name** box, enter a name for your campaign.
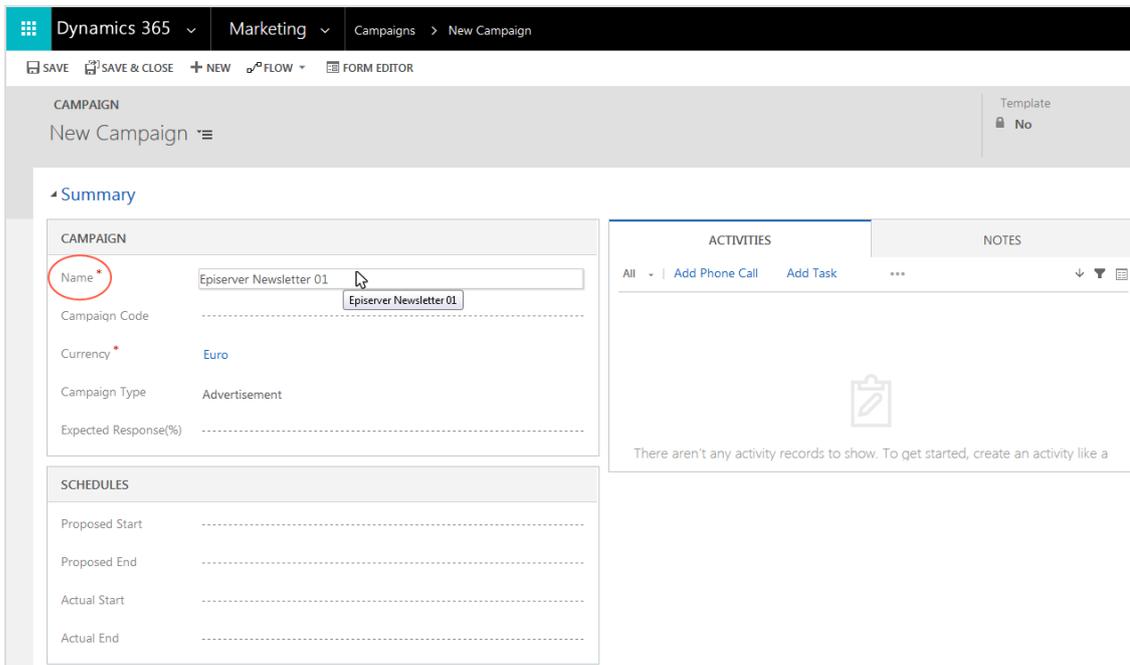
4. In the **Currency** box, specify a currency for the campaign.
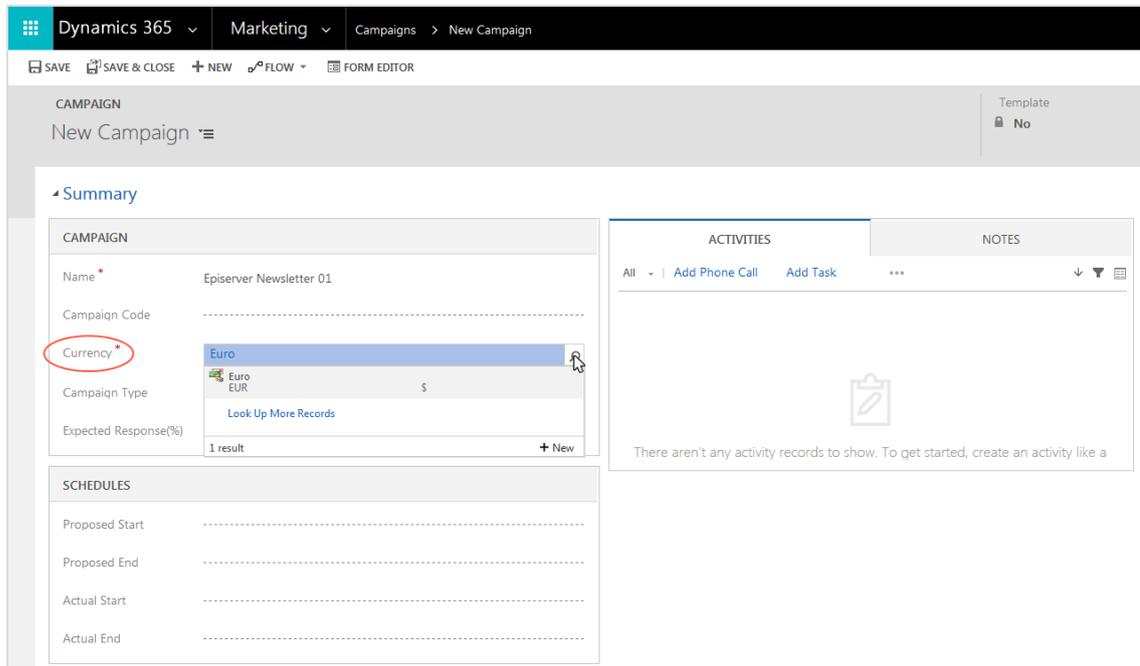
5. Click **Save**.

6. In the **Marketing Lists** area, click the plus icon **+**, select the desired marketing list and click **Add**.
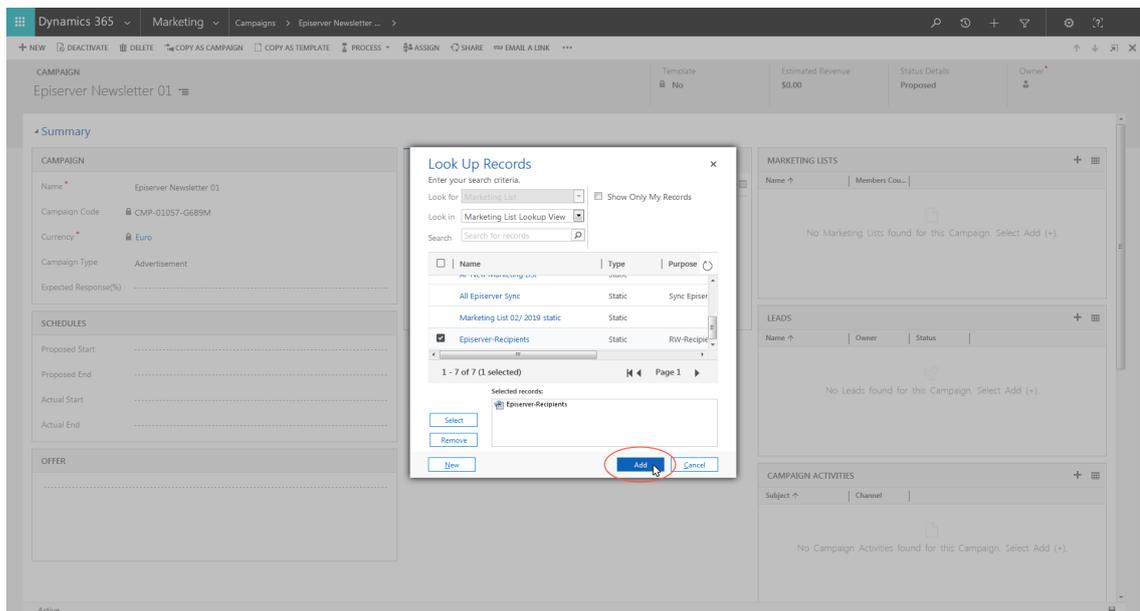
7. Click **Save**. Keep the window open for the next step.

Preparing campaign activity for dispatch

1. Click the plus icon **+** in the **Campaign Activities** area.
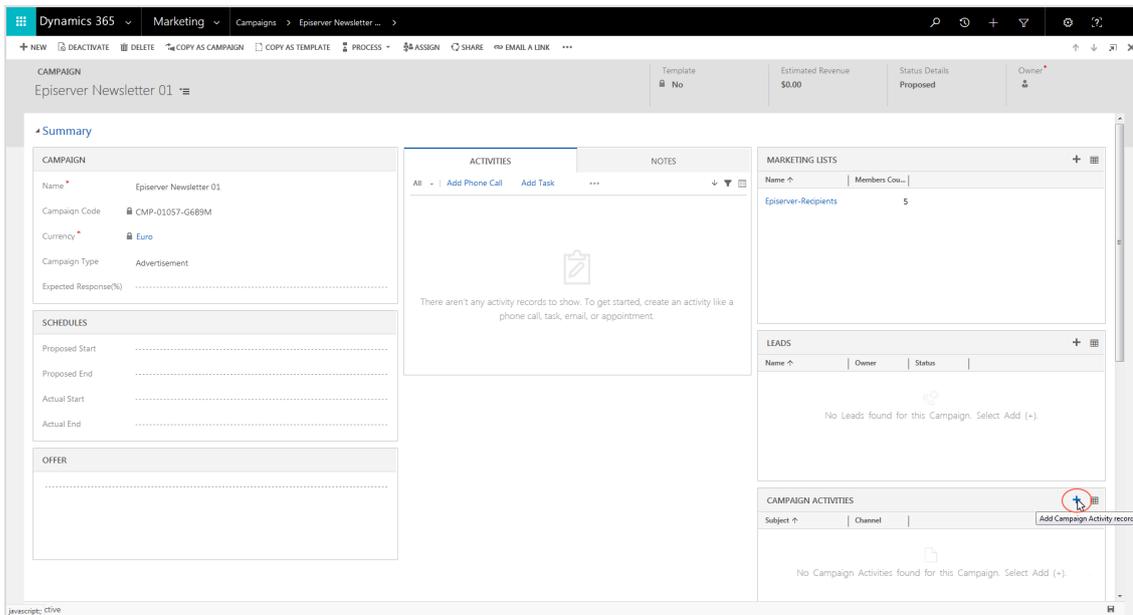
2. In the **Subject** box, enter a subject for your campaign activity.
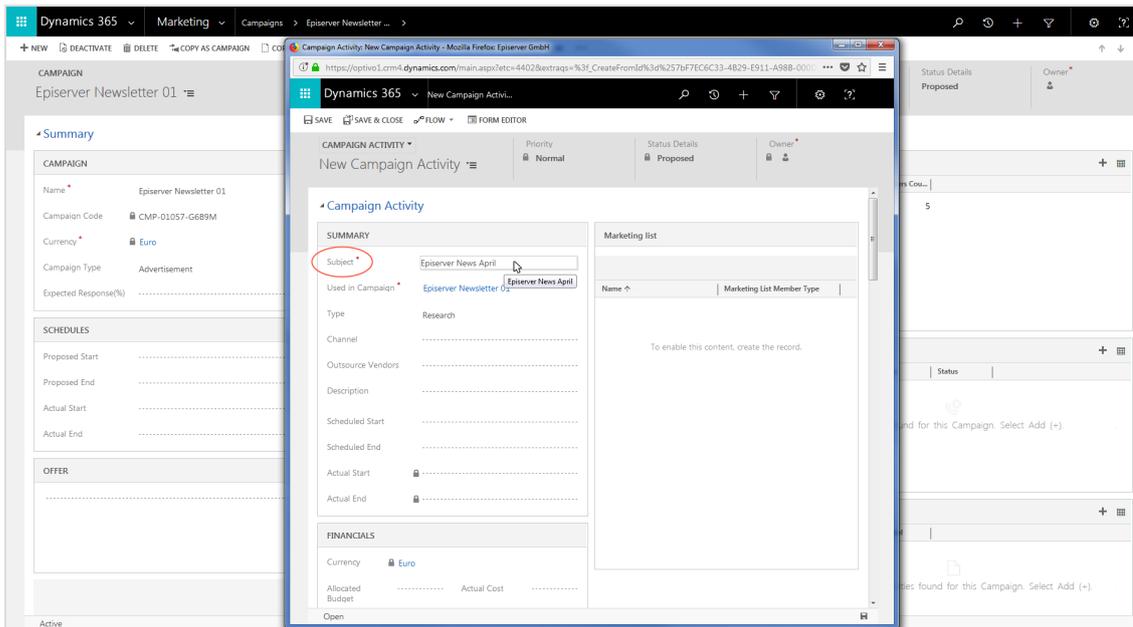
3. Under **Channel**, select **Episerver Campaign**.
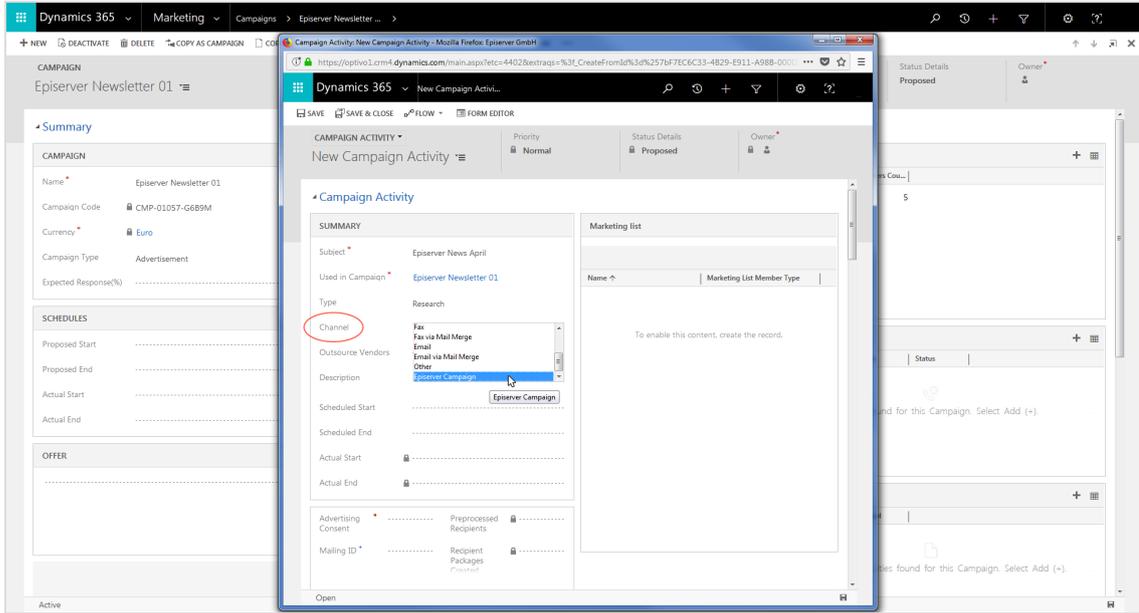
4. Under **Advertising Consent** in the new options area, click **Search** and select the corresponding advertising consent.
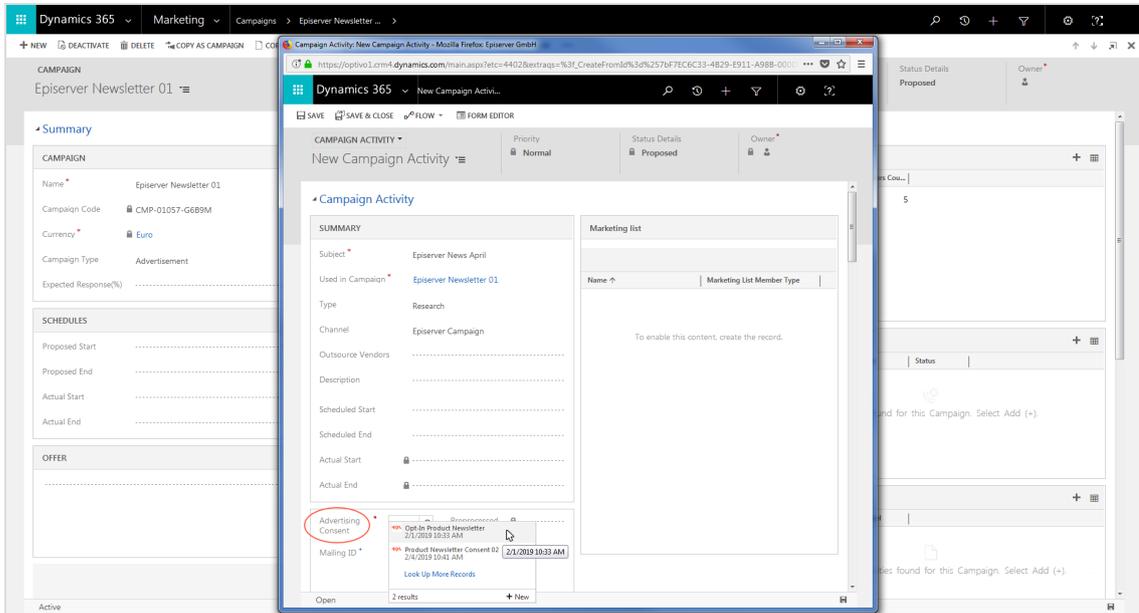
5. In the **Mailing ID** box, enter the ID of the mailing to be sent. This must be in the Episerver Campaign client to which the advertising consent is assigned.
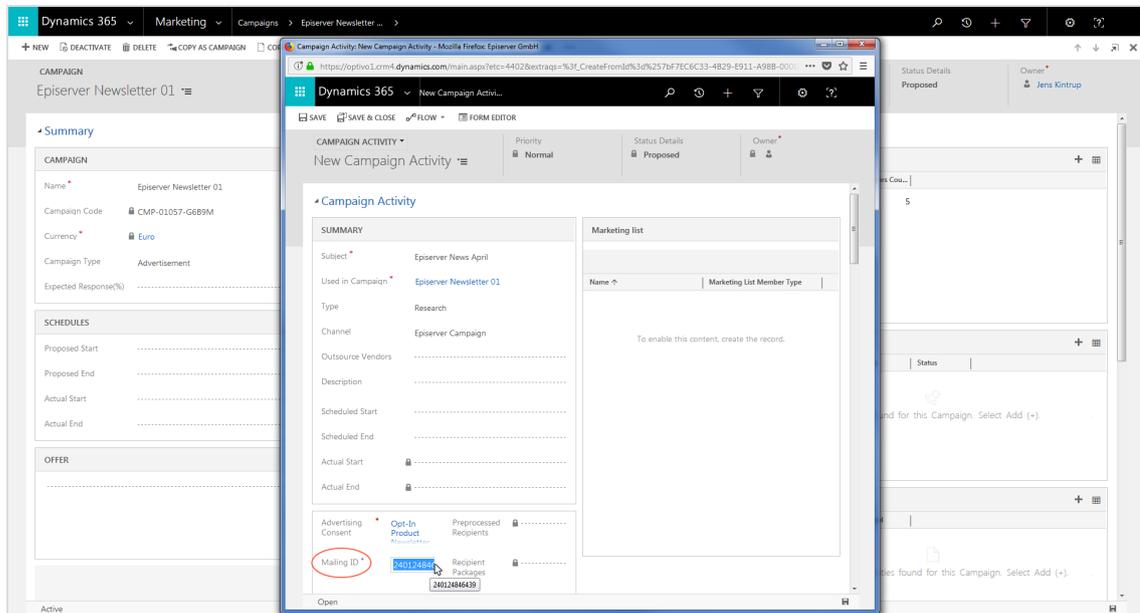
> **Note:** You can find the **mailing ID** in Episerver Campaign in the overview for the message you want to send. Do not confuse this with the **campaign ID** in Episerver Campaign, which is used in CRM.

6. Click **Save**.

Starting and monitoring dispatch workflows

Starting the workflow

1. Click **Run Workflow** in the campaign activity screen in Microsoft Dynamics CRM.
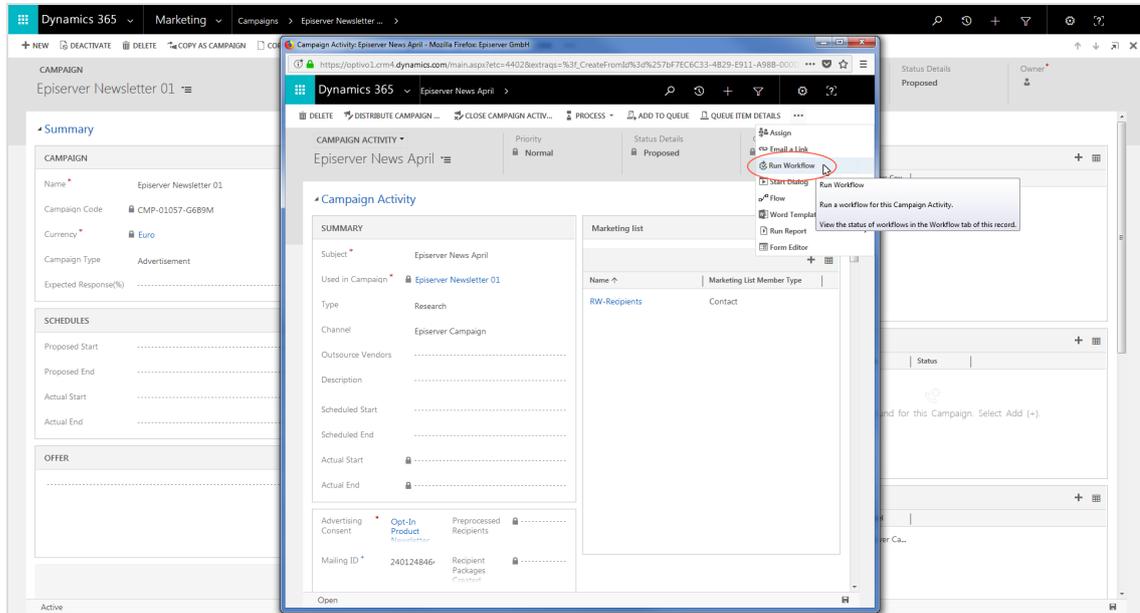
2. Select **Episerver: Send campaign activity to Episerver Campaign** and click **Add**. Do not start the work-flow **Episerver: Start mailing in Episerver Campaign**. This is automatically called by the integration.
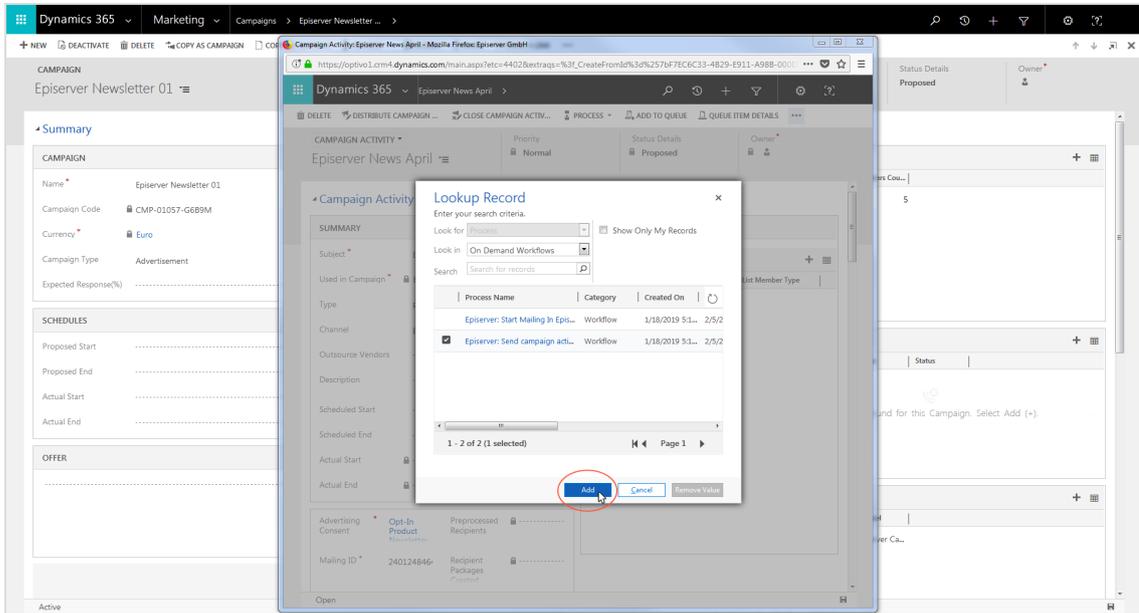
Contacts and leads from the marketing list are transferred to Episerver Campaign via the interface through **Recipient packages**, and the **Mailing status** changes from **Planned** to **Transmitting**.

Monitoring workflow activity

1. In Microsoft Dynamics CRM, go to **Settings** > **System Jobs**.
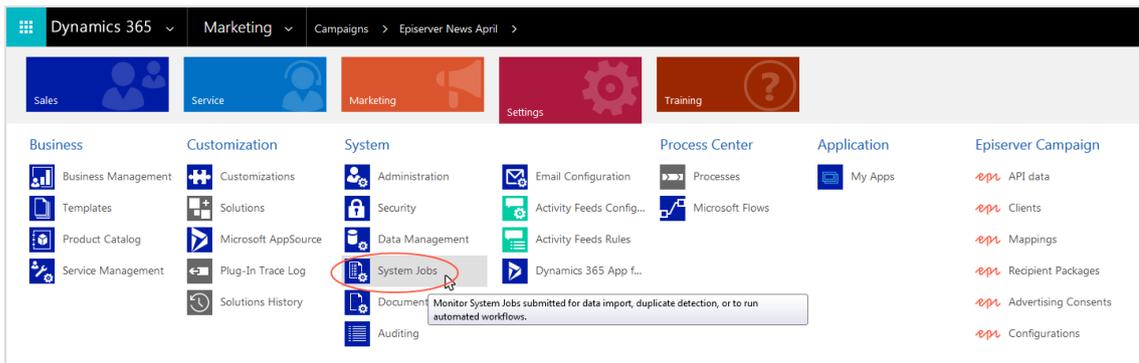
2. Under **View**, open **My System Jobs** from the drop-down list. You can see the current workflow status under **Status Reason**.

> **Note:** If an error is displayed under **Status Reason**, click the corresponding workflow to see details.

Sending transactional mails

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to send transaction mails in Episerver Campaign from Microsoft Dynamics CRM using a workflow in CRM. After sending, response data (opens, clicks) are automatically transferred into CRM.

Prerequisites

- **Configuration** of the integration completed, see Configuration.
- **Campaign mailing** prepared in Episerver Campaign.
- The **ID of the campaign mailing** to be sent. You can find the ID under **Transactional mails** in Episerver Campaign. Select the column **ID** in the drop-down list to the right.
- The authorization code of the recipient list used by the transactional mailing.

Configuring transactional mailings and workflows

Before sending a transactional mailing from Episerver Campaign, you need to configure the transactional mailing in Microsoft Dynamics CRM. You can send these mailings to contacts, accounts or leads even without advertising consent. You also need to define a workflow to trigger the transactional mailing.

Configuring the transactional mailing

1. Switch to **Settings** > **Configurations** in Microsoft Dynamics CRM.

2. Click **New**.

3. Enter a name for the configuration.

4. In the **Value** field, define the configuration using an XML format. The fields `<authCode>` and `<bmMailingID>` are mandatory.

   For `<authCode>`, enter the **authorization code** for the transactional mailing's recipient list. For `<bmMailingId>`, enter the **mailing ID** of the transactional mailing.

   Other fields can be optionally linked, as long as the information is available in CRM.

   ```
   <root>
   <authCode>authorization.Code</authCode>
   <bmMailingId>mailing.ID</bmMailingId>
   <firstname>object.firstname</firstname>
   <lastname>object.lastname</lastname>
   <salutation>object.salutation</salutation>
   </root>
   ```

   When sending from another entity except *contact*, *lead* or *account*, a lookup references to the connected `bmRecipientId`. Furthermore, data fields in *contact*, *lead* or *account* are integrated via lookups.

   ```
   <root>
   <authCode> Authorisierungs-Code </authCode>
   <bmMailingId> Mailing-ID </bmMailingId>
   <bmRecipientId>object.new_exampleentityfor.emailaddress1</bmRecipientId>
   <dynamicsId>object.new_exampleentityfor.contactid</dynamicsId>
   <first_name>object.new_exampleentityfor.firstname</first_name>
   <last_name>object.new_exampleentityfor.lastname</last_name>
   </root>
   ```

   You can find the name of the lookup element that is inserted between the `object` and the field name (for example, `contactid`) in the **Fields** overview. Search for the name of the field in which the lookup for *contact*, *lead*, or *account* is performed. In the example, the name is *new_exampleentityfor*.
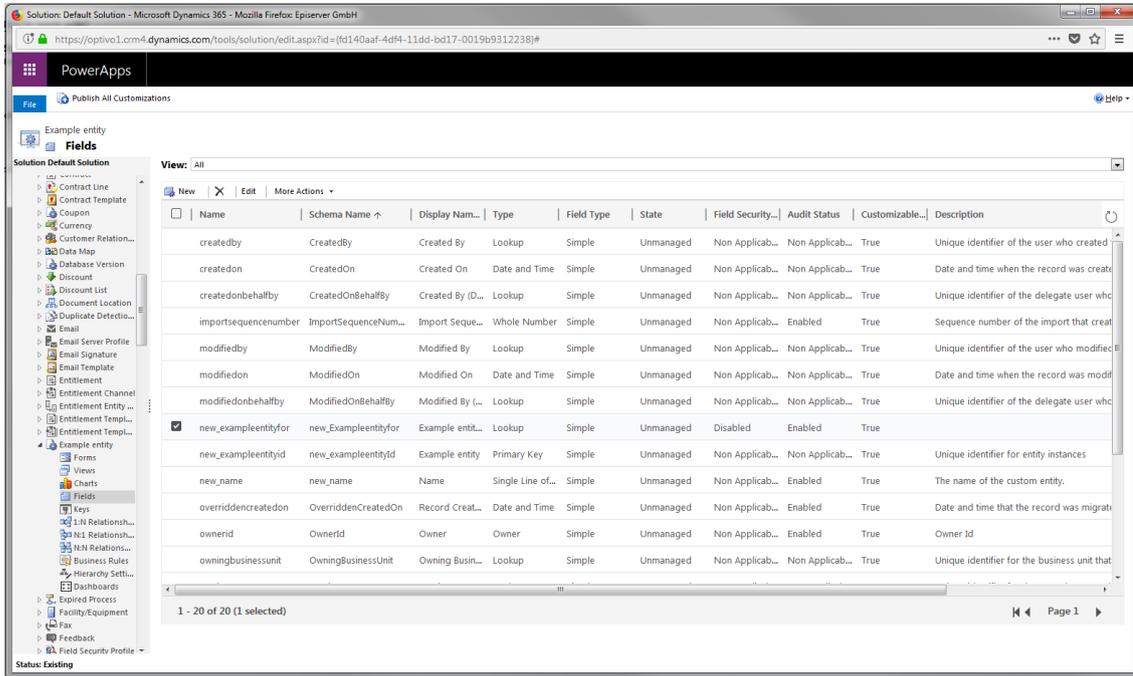
5. Click **Save & Close**.
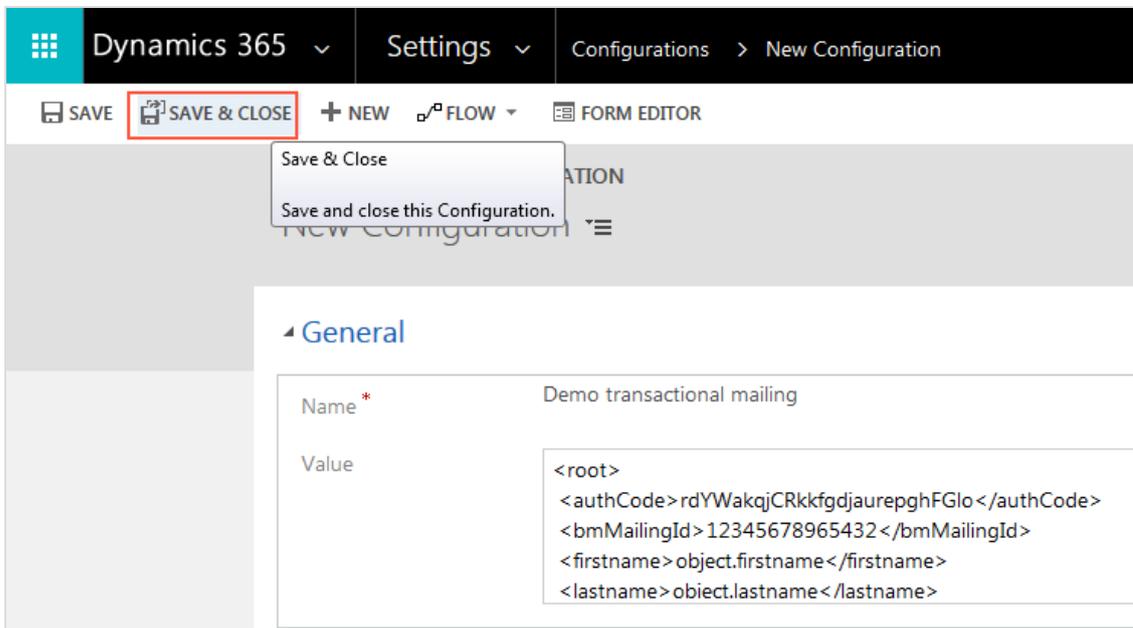
Note: The configuration can be updated and saved if needed.

Configuring the workflow

1. Switch to **Settings** > **Processes** in Microsoft Dynamics CRM.

2. Click **New**.
3. Enter a name in **Process name**.
4. Under **Category**, select **Workflow**.
5. As **Entity**, select **Contact**, **Lead** or **Company**.
6. Keep the selection **Run this workflow in the background**.
7. Select **New blank process**, if you are not using an existing workflow as template,
8. Click **OK**.

9. Under **Activate As** define if the workflow is to be created as process or as template.
10. Under **Available to Run**, select the dependencies of the process. For manual start, select **As an on-demand process**.

11. Under **Workflow Job Retention**, define if the workflows should be automatically deleted after completion.

12. Under **Options for Automatic Processes**, define who can start the process.

13. Under **Start when**, define which action should trigger automatic dispatch. If nothing is selected, the dispatch is started manually in CRM.

14. Select **Add Step** > **Episerver Campaign** > **Send Transaction Mail**.
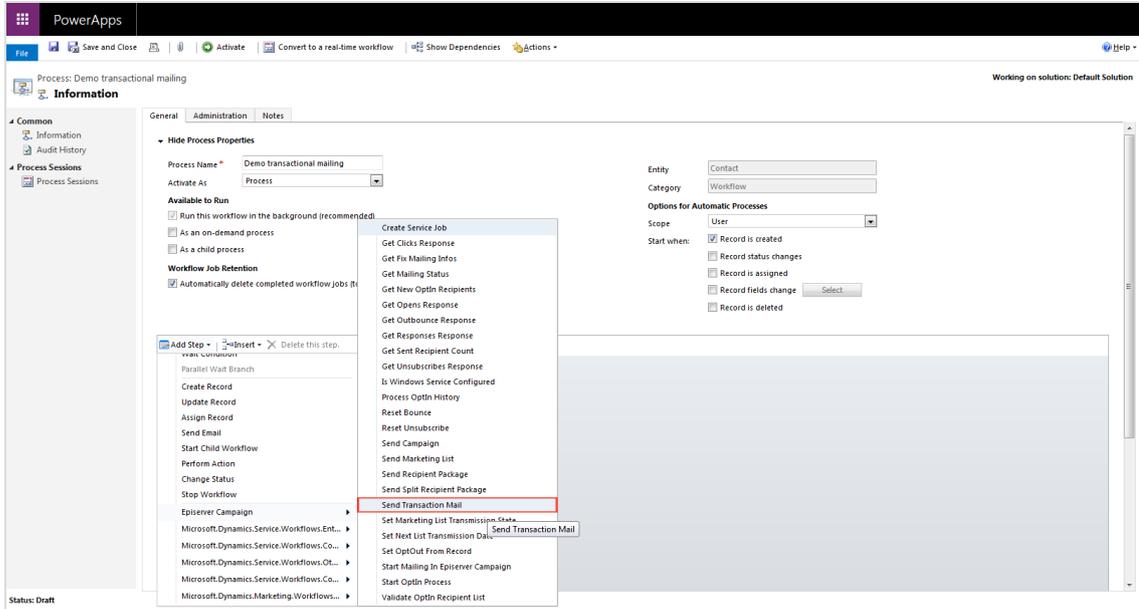
15. Click **Set Properties**.

16. In the **Value** column, search for and select the previously created configuration.
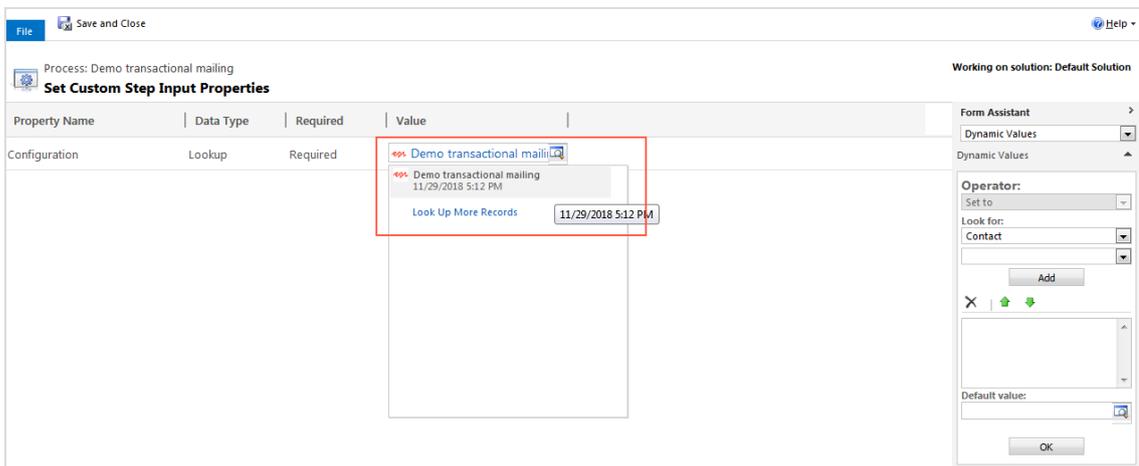
17. Click **Save and Close**.

Checking return values of the process

You should add error handling steps, configuring how the process should handle different return values of incorrectly sent transactional mails. Transactional mailings are sent using the sendtransactionmail operation of the HTTP API. Here is an example for canceling an unsuccessful process.

1. In the **Process** window in Microsoft Dynamics CRM, click **Add Step** > **Check Condition**.
2. Click **<condition> (click to configure)**.
3. Click **Select**.
4. Click **Send Transaction Mail**.
5. Click **Service Response** in the second drop-down list.
6. Click **Does Not Begin With** in the third drop-down list.
7. Click **Enter value** and enter the return value *enqueued*.
8. Click **Save and Close**.
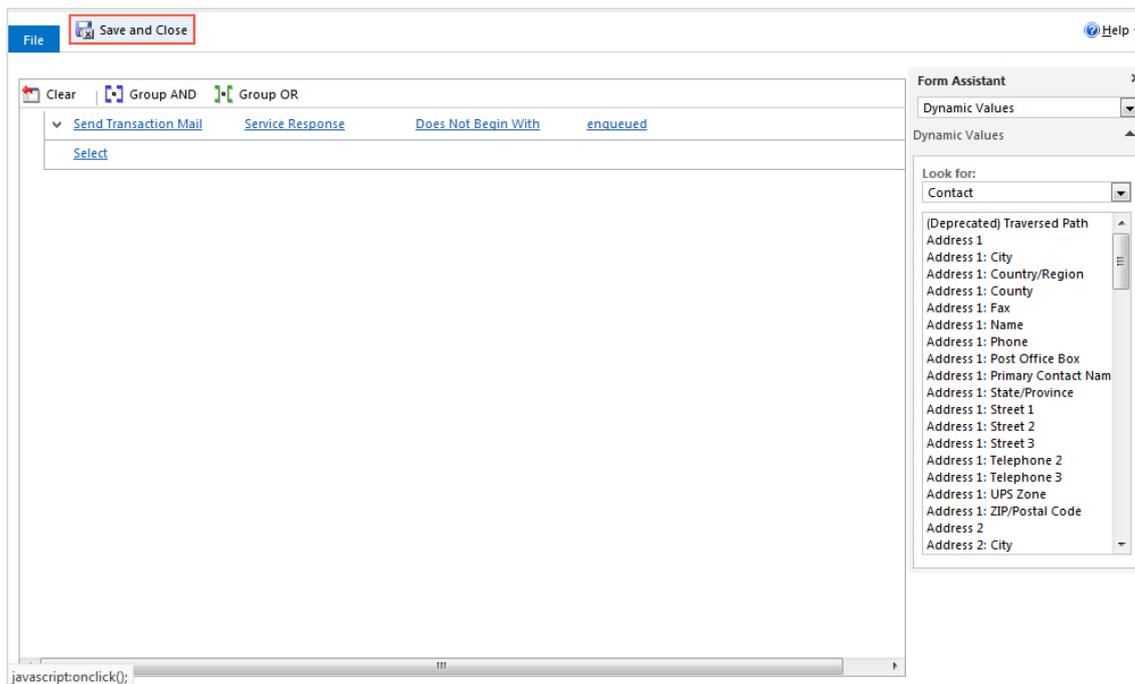
9. Click **Select this row and click Add Step**.
10. Select **Add Step** > **Stop Workflow**.

11. Select **Canceled** in the status drop-down list.
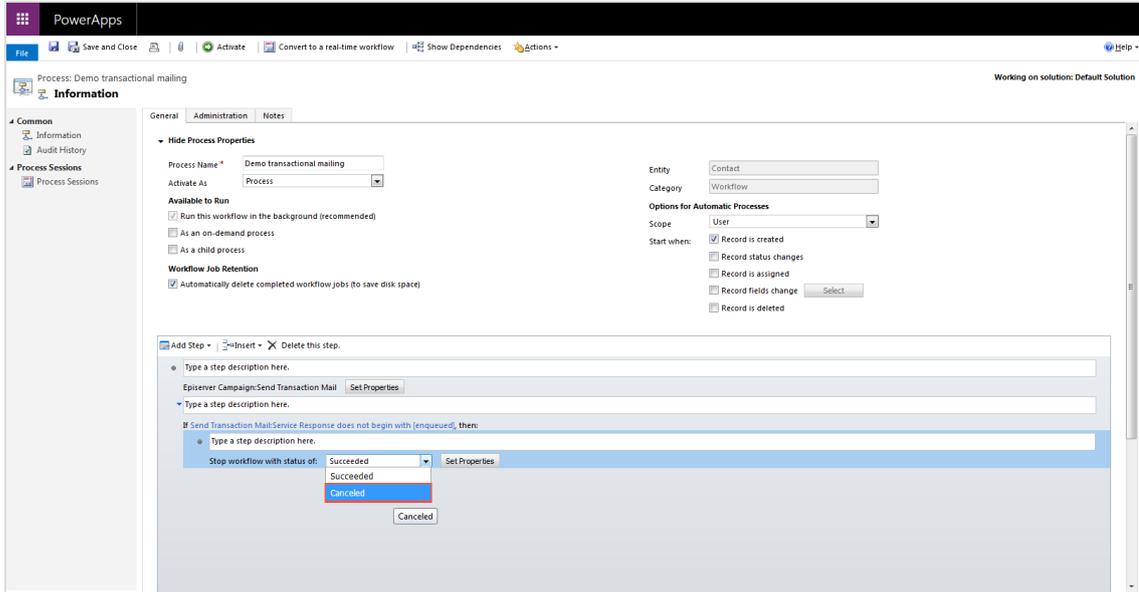
12. Click **Set Properties**.
13. Click in the **Value** column.
14. In the drop-down list, select **Look for:** > **Send Transaction Mail**.
15. In the drop-down list, select **Service Response**.
16. Click **Add**.
17. Click **OK**.
18. Click **Save and Close**.
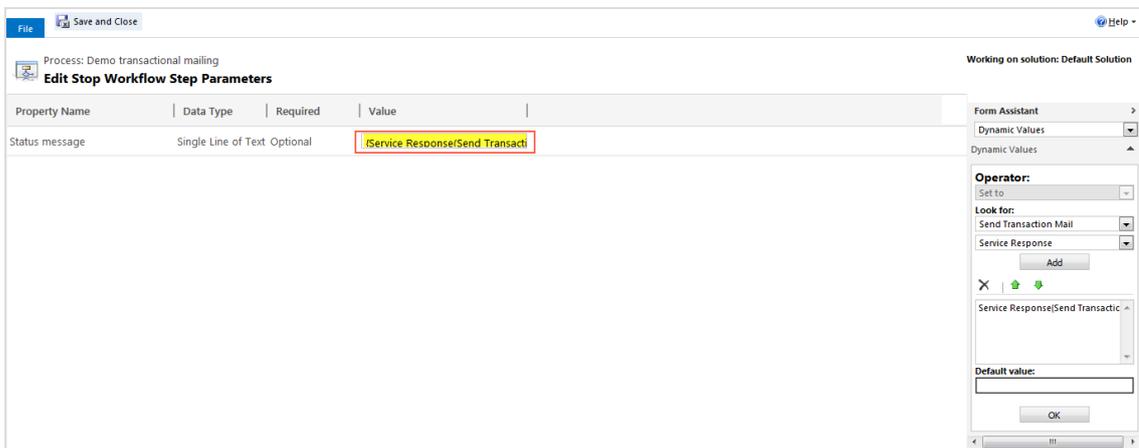
19. Under **Process** in the menu bar, click **Convert to a real-time workflow**.
20. Click **Activate**, and **Activate** in the **Process Activate Confirmation** dialog box.

21. In the **Process** window, click **Close**.
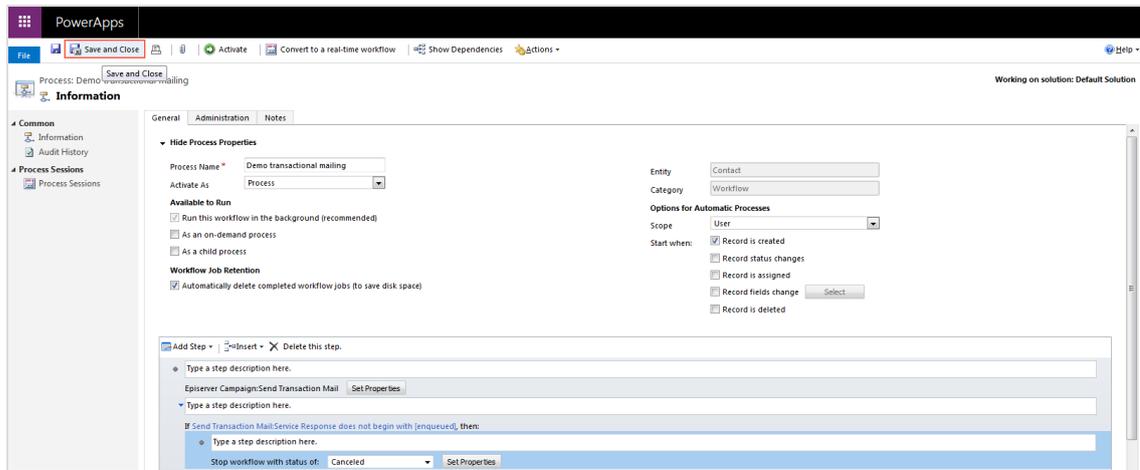
Send out transactional mailing

The workflow is now fully created, activated and starts according to the preconfigured action or may be triggered manually. A transaction mailing is started manually from the entity specified in the process.

1. Select **Run Workflow** in the entity.
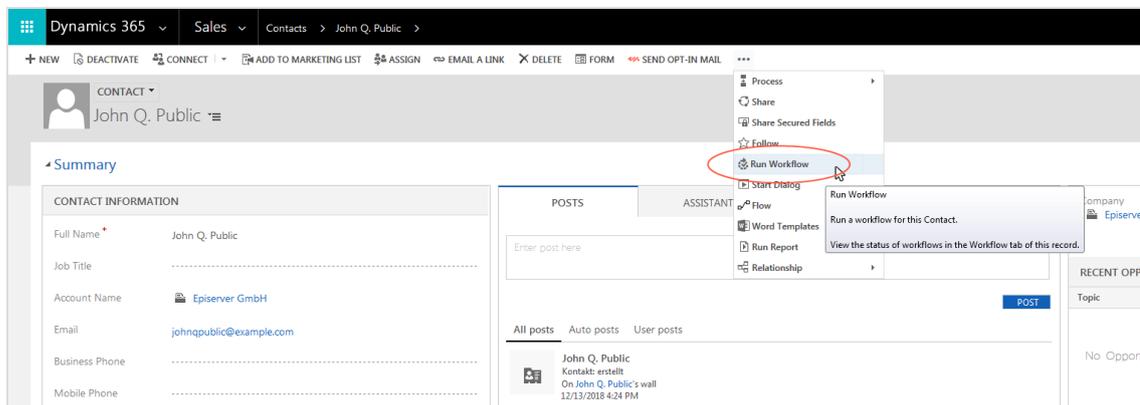
2. The **Lookup Record** dialog box opens. Select the workflow of the transaction mailing and click **Add**.
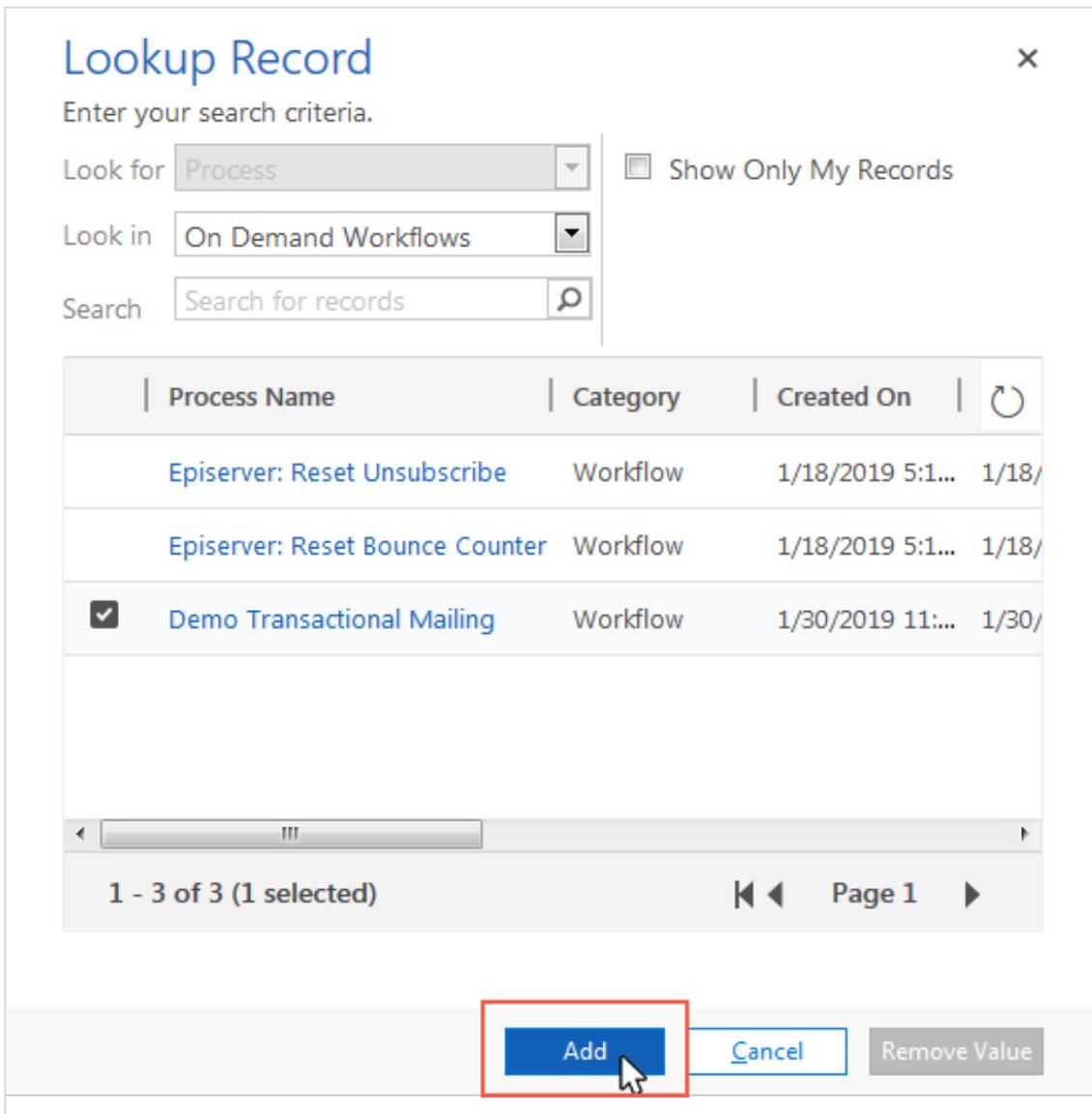
3. The dialog box **Confirm Application of Workflow** opens. Click **OK**.

Copying marketing lists

> **Note:** This topic is for administrators and developers with administration access

rights in Episerver Campaign.

With the Microsoft Dynamics CRM integration you can copy contacts and leads from a marketing list to an Episerver Campaign recipient list on a daily or weekly basis. You can then use this data to send welcome or birthday mailings in a Marketing Automation campaign.

The copying is one-way from CRM to Episerver Campaign. Unsubscribes and outbounces are updated back into CRM. Other data will not be updated in CRM if changed in Episerver Campaign.

Prerequisites

You must contact customer support to configure a corresponding recipient list in the relevant client. Furthermore, you must configure the marketing list for the copying process and start the workflow for automatic copying.

> **Note:** The recipient list format is the same as for campaign management. If you need additional fields in your recipient list, contact customer support before configuring copying of marketing lists.

Configuring the marketing list for the copying process

After the recipient list is configured, do this in Microsoft Dynamics CRM:

1. Open the **Marketing** area and click **Marketing Lists**.
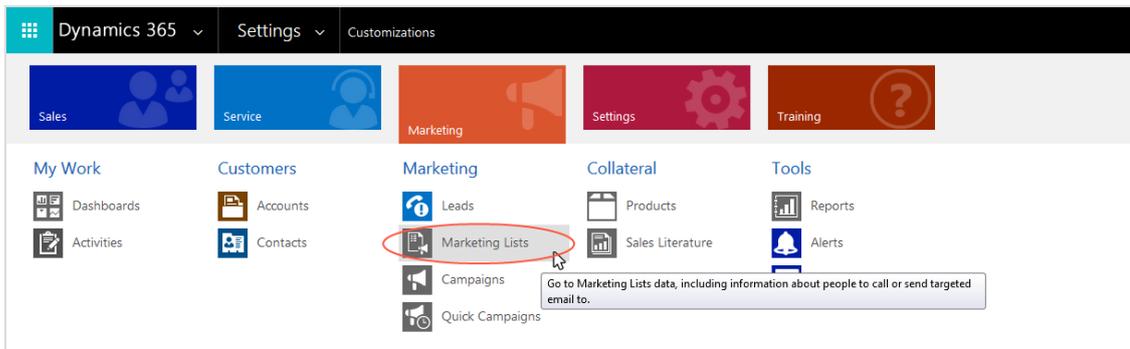
2. Select the marketing list to synchronize and click **Edit**.
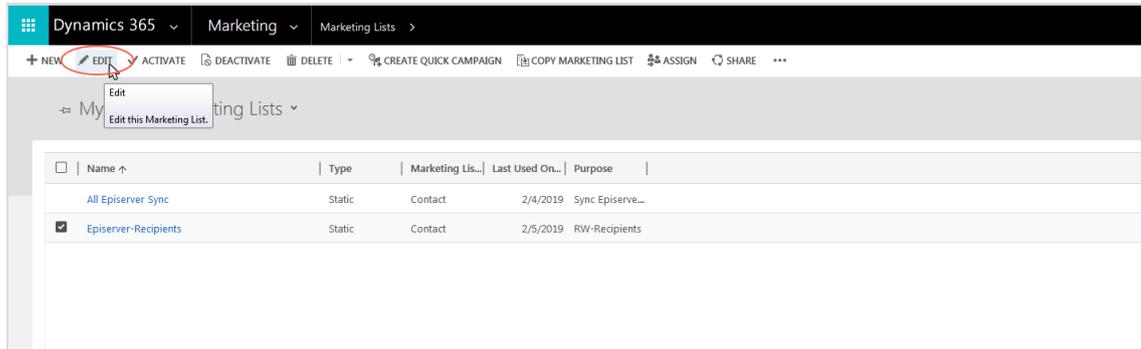
3. Click **Yes** in the field next to the **Episerver Campaign Recipient list**.
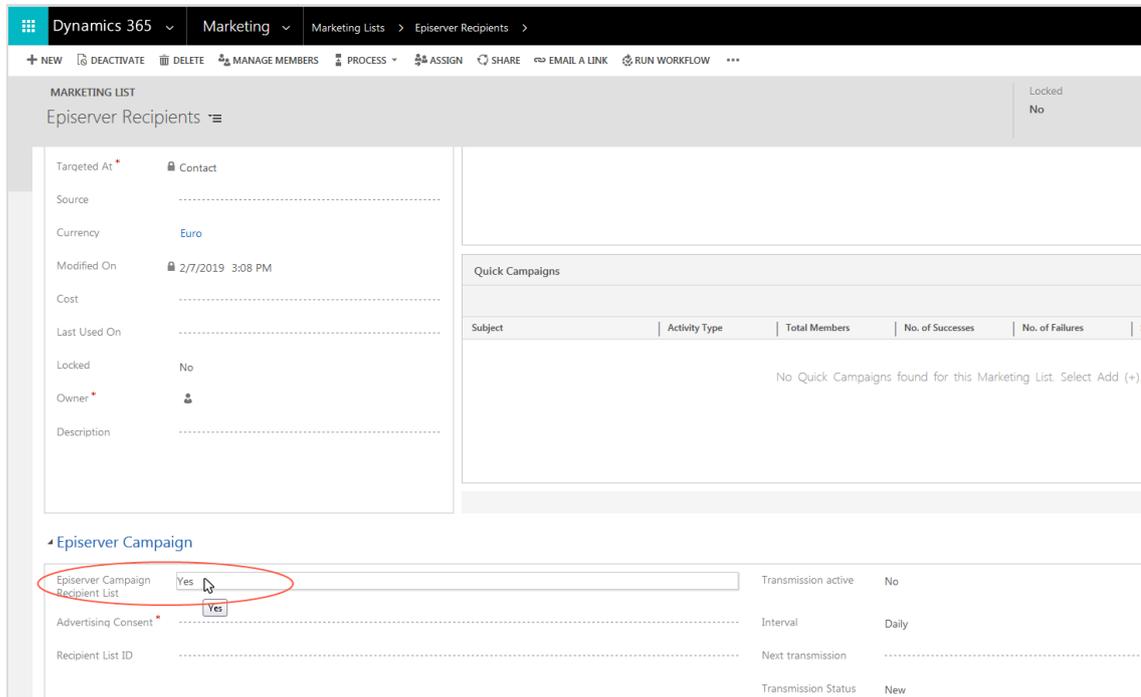
4. Click **Yes** in the field next to **Transmission active**.
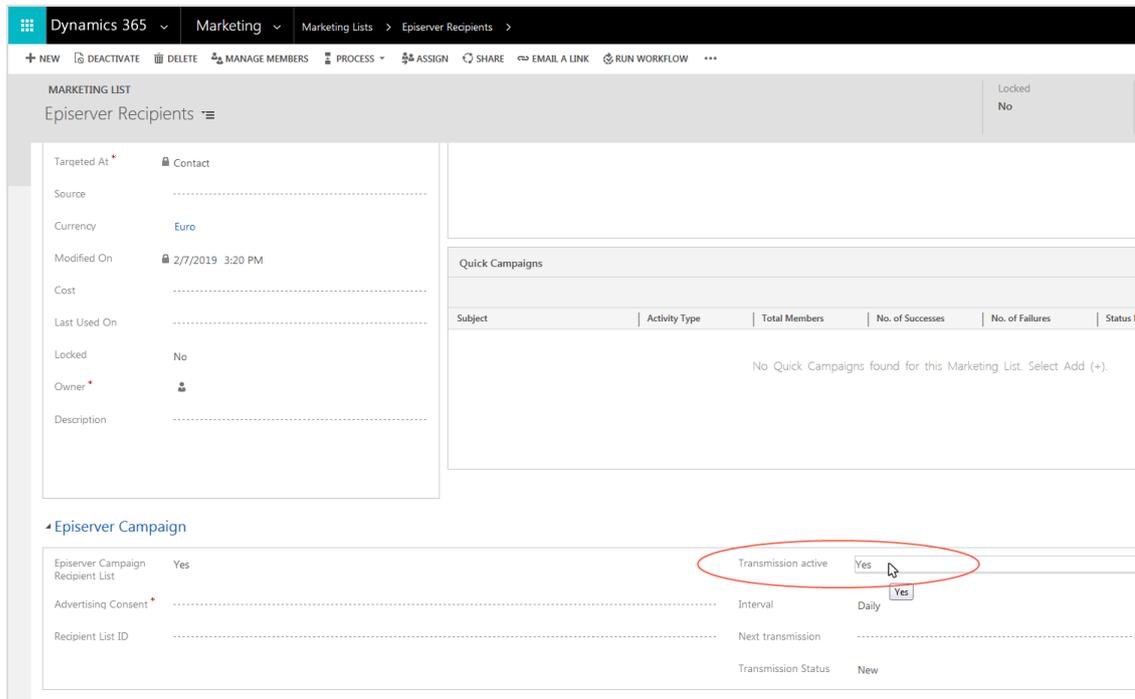
> **Note:** **Transmission active** must be set to **Yes** for the copying to start. If needed, you can disable the copying later by setting the field to **No**, without losing the configuration.

5. Under **Advertising Consent**, select the marketing permission to be used as criterion when selecting contacts and leads to transfer. Click the magnifying glass symbol in the field and select the relevant marketing permission.
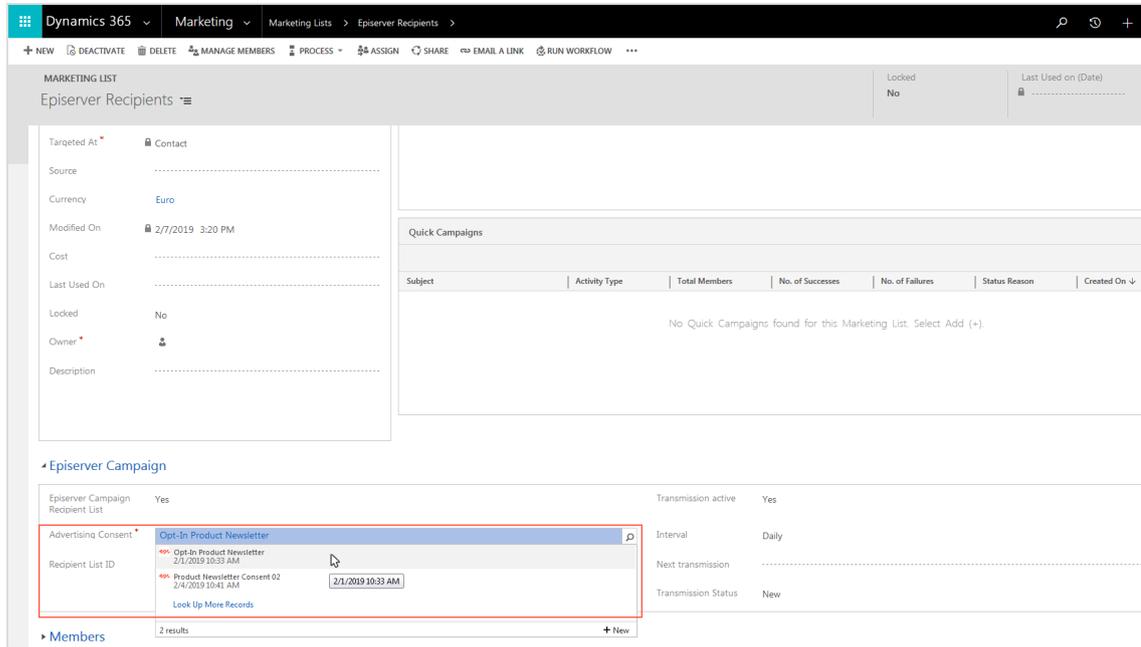
6. In the **Recipient List ID** box, enter the ID of the Episerver Campaign recipient list into which the marketing list is to be copied.
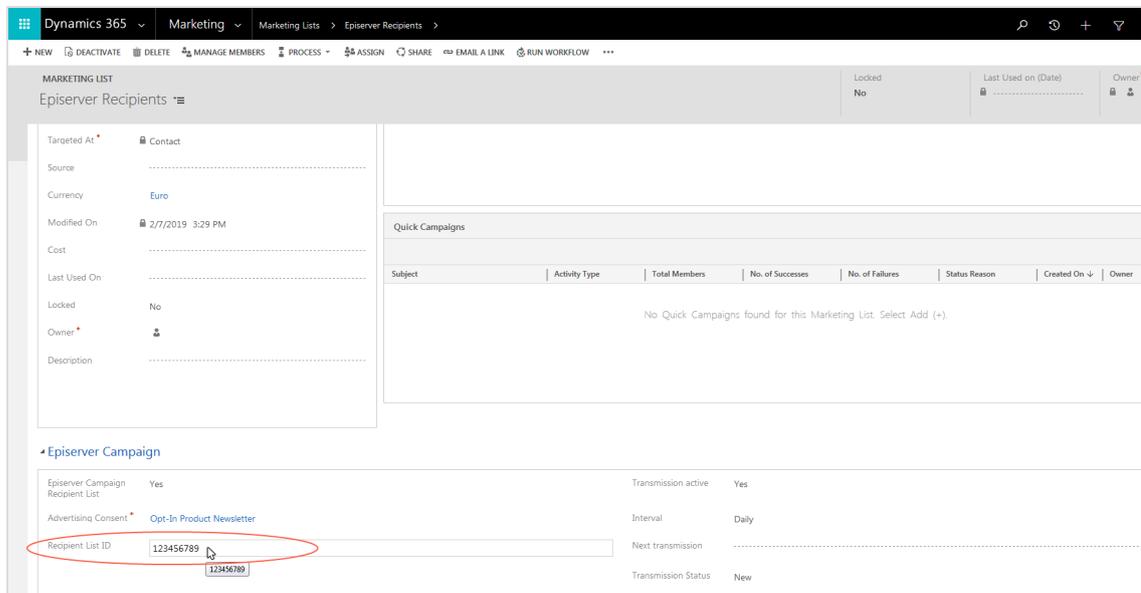
> **Note:** You can find the **recipient list IDs** in Episerver Campaign. Open the start menu, select **Administration > API overview**, and open the **Recipient lists** tab.

> The IDs are displayed in the overview.

7. Under **Interval**, select the time interval for the copying (daily or weekly) by clicking in the field.
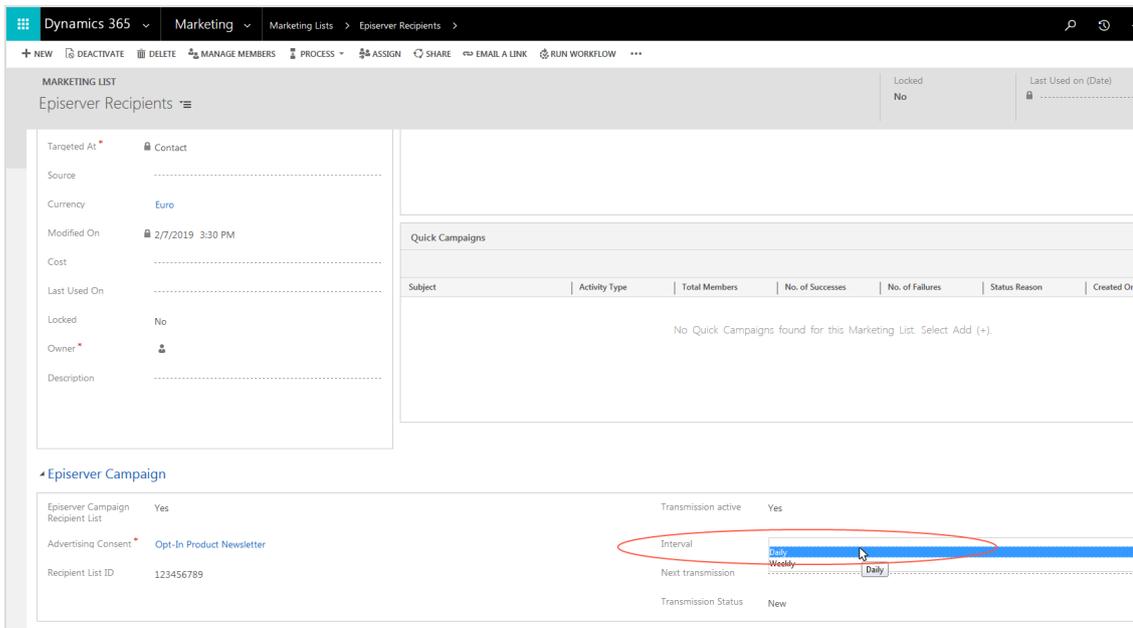
8. When done, click the disc symbol at the bottom right to save.

If the copying process is running successfully, the **Transmission Status** field will show **Running**. If there is an error, the status field will show **Error**. See **Maintenance and Troubleshooting**) for error messages.

Starting and monitoring copying workflows

Starting the workflow

1. Click **Run Workflow** in the campaign activity screen in Microsoft Dynamics CRM.
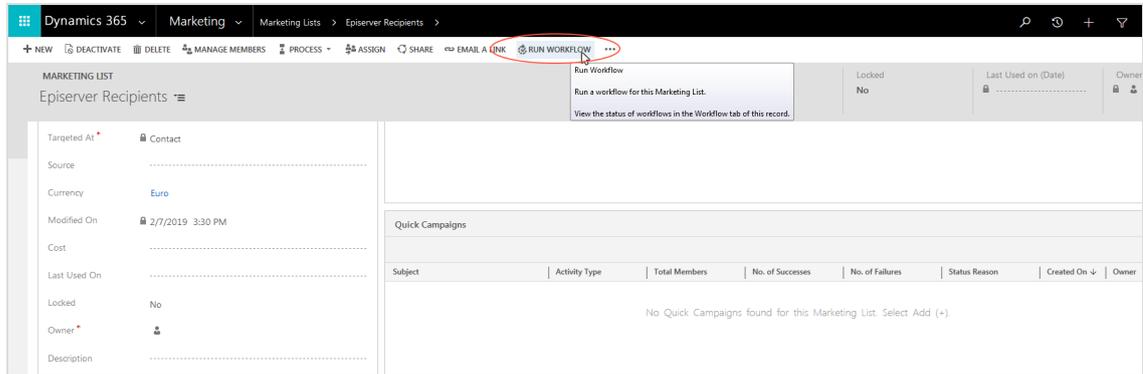
2. Select **Episerver: Send marketing list to Episerver Campaign** and click **Add**.
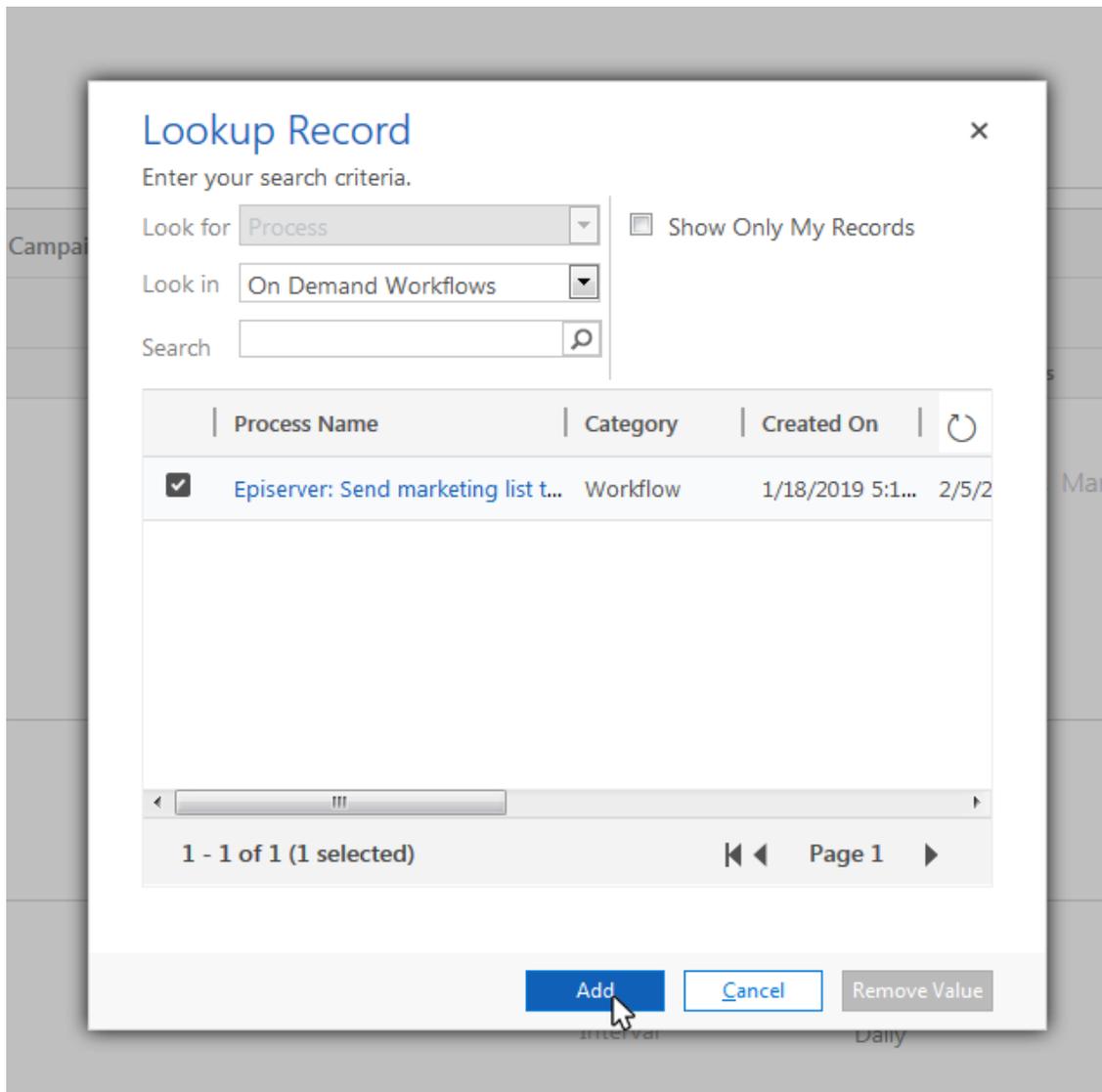
Monitoring workflow activity

You can view the current status of the workflow at any time under **Settings** > **System** > **System Jobs**.

If the workflow fails, the time for **Nächste Übertragung** (**Next Transmission**) is automatically changed to the next day or week. To export the marketing list before the next automatic export after resolving the error, click in the field next to **Nächste Übertragung** (**Next Transmission**) and select the date and time.

Feeding response data to Microsoft Dynamics CRM

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to send recipient response data back to Microsoft Dynamics CRM, when integrating this with Episerver Campaign. By default, the response data is accessed hourly.

The response data includes:

- Mailing opened
- Link clicks in the mailing
- Direct replies to the mailing
- Unsubscribes (opt-outs)
- Bounced recipient email addresses

> **Note:** To display unsubscribes (opt outs) and outbounces, the required fields must first be configured. See **Configuring the integration**.

Unsubscribe (opt out)

When an unsubscribe is registered in Episerver Campaign, this information is transferred to Microsoft Dynamics. As a result, the lead or contact's advertising consent gets an opt-out entry in the opt-in history. If the most recent entry for an advertising consent according to the time stamp is an opt-out entry, the contact or lead no longer receives a newsletter. Furthermore, with a current opt-out entry, there will be no transmission of recipient data when the marketing list checks for the existence of advertising consent during synchronization.

If the contact or lead has given his advertising consent for more than this newsletter, all other subscriptions remain active.

Outbounce

> **Note:** The display of outbounces requires the configuration of the field in the form.
> See Creating consents and linking to client.

If Episerver Campaign detects that an email is no longer reachable, the outbounce status is changed from **No** to **Yes**. This status applies to all advertising consents on the channel and across all clients – regardless of whether the outbounce was registered in every client.
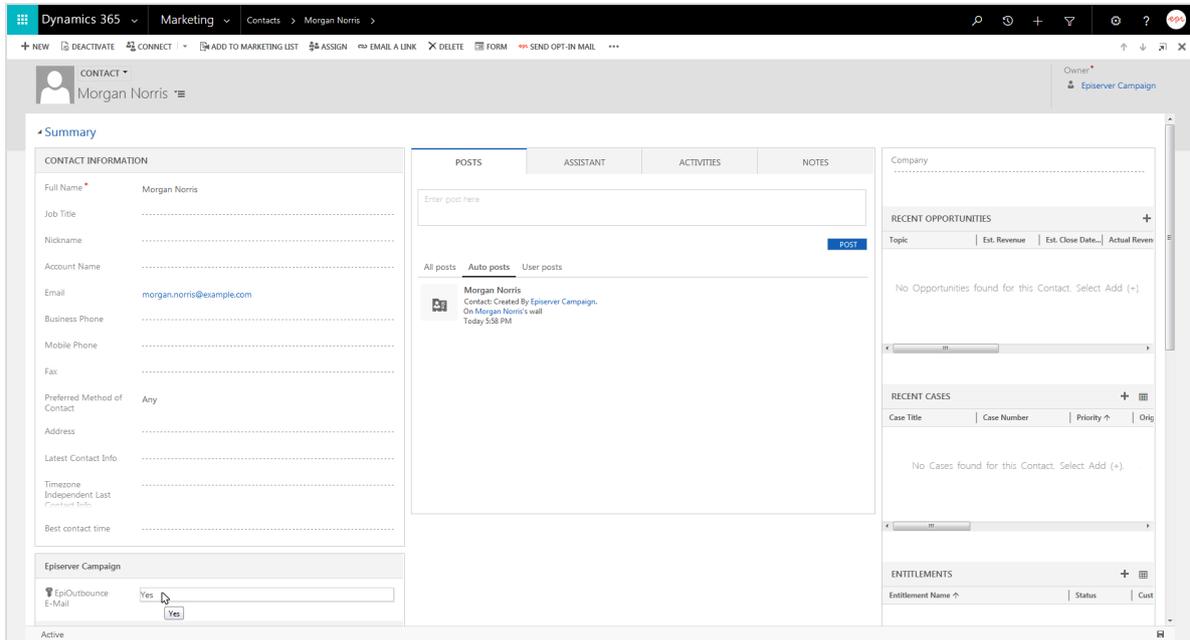
Opens, clicks, and direct replies

When a campaign is run, opens and clicks are imported as replies/campaign responses, and assigned to the campaign in CRM (saved in the campaign). The import differentiates between these response categories:

- Open
- Click
- Reply
- Autoresponder
- Unsubscription

Use these categories for further segmentation in CRM.

> **Note:** Opens, clicks and replies are only imported for mailings sent using campaign management. Opens and clicks from a copied marketing list are not returned to the CRM.

Troubleshooting and maintenance

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to troubleshoot and maintain the Microsoft Dynamics CRM integration for Episerver Campaign. The following is included:

- Checking workflows for activity and errors.
- Common error messages.
- Reducing storage space used by the integration.
- Managing divergent time stamps.
- Service updates for Microsoft Dynamics 365 Online

Checking workflows for activity and errors

Active and running workflows are shown in the CRM settings under **System jobs**. You can apply a filter for the Episerver Campaign workflows under **Entity**. There are these categories:

- API data
- Recipient Packages

- Client
- Mapping
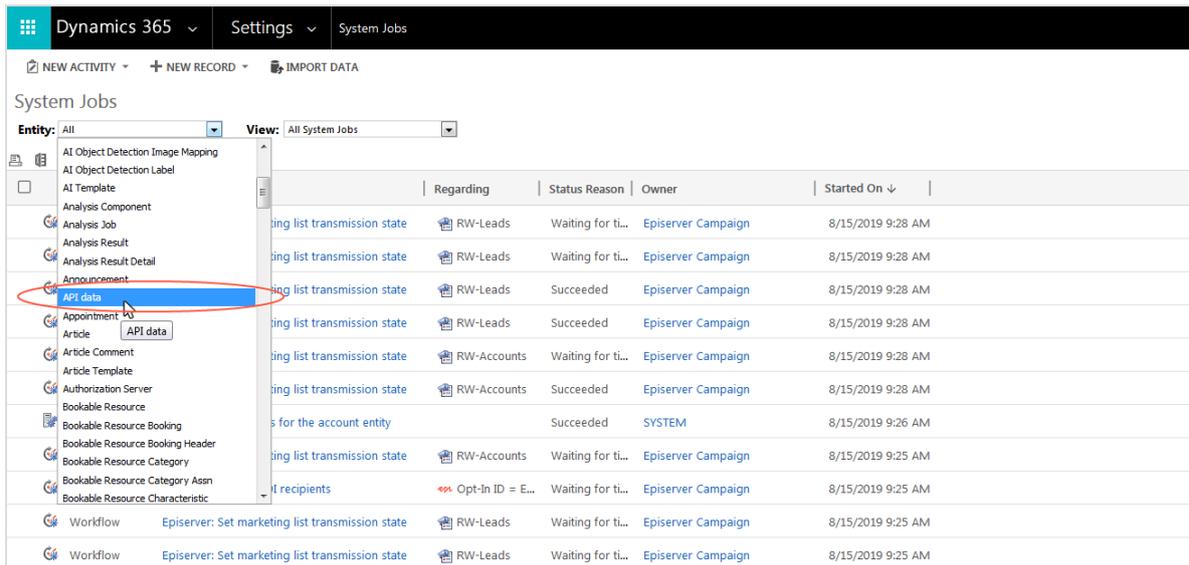
Regularly check the **Client** and **Recipient Packages** workflows for errors. See [Workflow error messages](#).

Do the following to check workflow activity for a client:

1. In Microsoft Dynamics CRM, open the settings and click **Clients** under **Episerver Campaign**.
2. Double click the client. The following is under **Information**, providing the time of the last data import:
   - Last clicks date.
   - Last opens date.
   - Last responses date.
   - Last unsubscribes date.
   - Date of last bounce limit overruns.
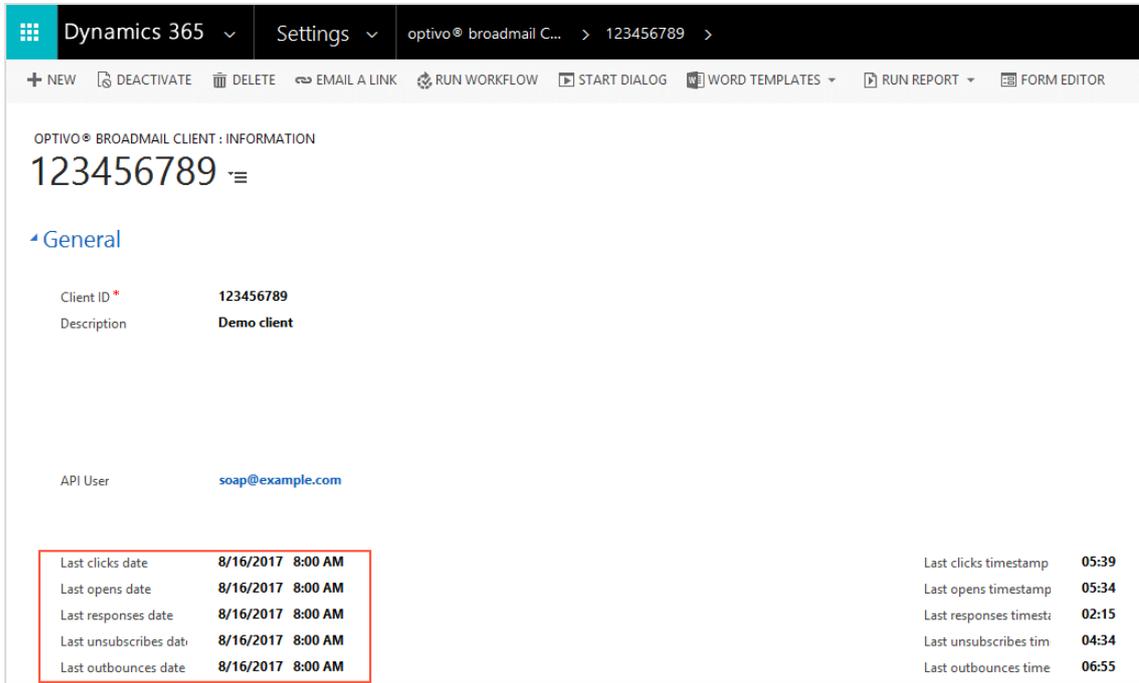
If one or more imports were done more than an hour ago, the workflow is no longer active. This can be due to insufficient resources within the CRM, or a network problem.

3. Click **Run Workflow** and select the workflow to restart. If the problem persists after restart, contact your system administrator.

Viewing workflow error messages

If a workflow did not run successfully, **Status Reason** under **Settings** > **System** > **System Jobs** shows the message **Failed**.
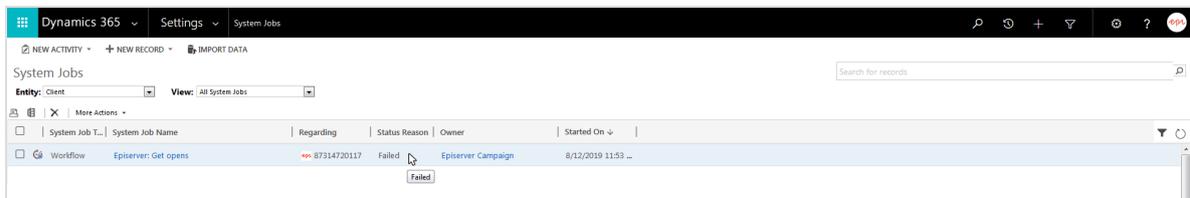
1. Click the name of the corresponding system job to see a detailed description of the error.

2. Resolve the error.

3. If you are unable to resolve the error, click **Details** to see the trace for the workflow.

4. Copy the trace text and error message with the time stamp for the error, and contact [customer support](#) providing the information.

Common error messages

Error message	Description
The specified mailing is not assigned to the mandator.	You have selected a mailing for the campaign that is not assigned to the same client as the selected marketing permission.
The number of flat recipient field values (57) is not a multiple of the number of recipient field names (18).	The configuration of the fields to be transferred does not match the recipient list fields of the Episerver Campaign client.

Reducing used disk space

Reducing used disk space is optional. The integration operation will not be affected if this is not done. However, you will save storage resources and have a better overview of workflows.

The following options are available:

- Delete recipient packages no longer required.
- Delete completed workflow jobs.

Deleting recipient packages no longer required

1. In Microsoft Dynamics CRM, open **Settings** and click **Recipient Packages** under **Episerver Campaign**.

2. Click the arrow next to **Active Episerver Campaign Recipient Packages**.
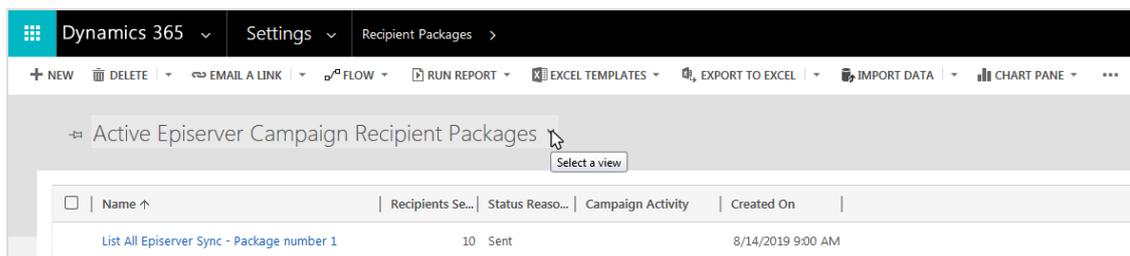
3. In the drop-down list, select **Old Episerver Campaign Recipient Packages**.
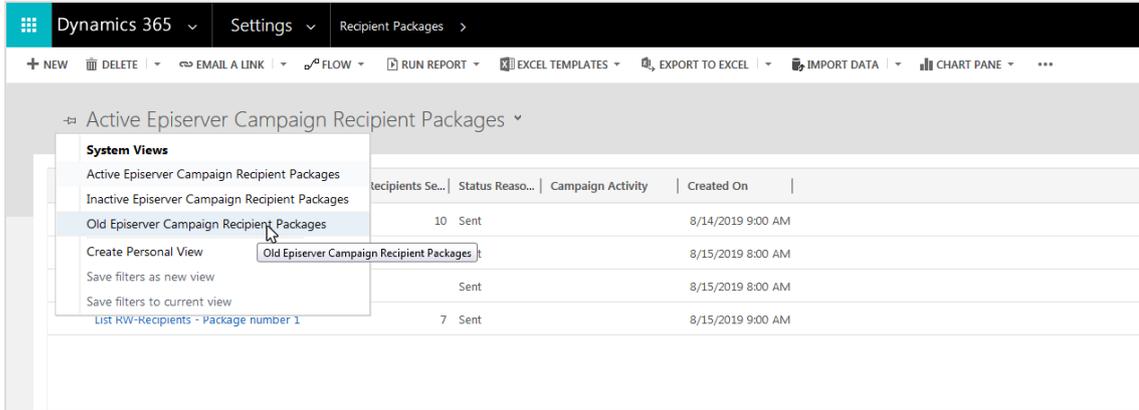
4. Select the recipient package to delete and click **Delete**.

Deleting completed workflow jobs

By default, Microsoft Dynamics keeps completed workflow jobs. To configure automatic deletion of completed workflow jobs, do the following:

1. Open the settings and click **Processes** under **Process Center**.

2. Click the arrow next to the title.
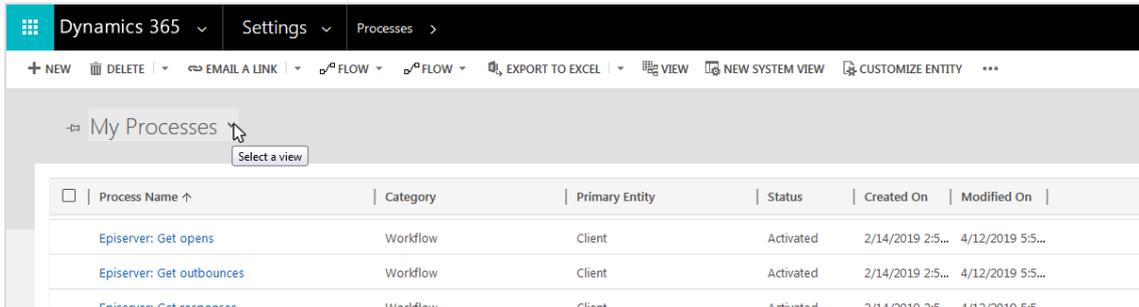
3. In the drop-down list, select the corresponding option, such as **Activated Processes**.
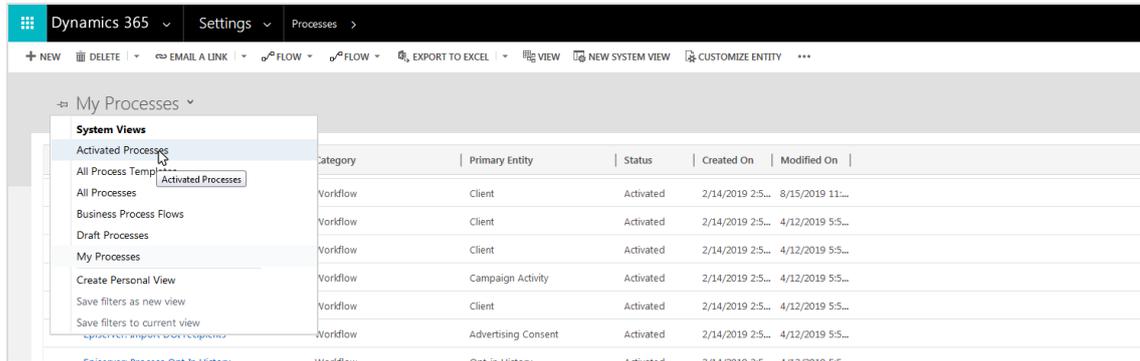
4. Click the workflow for which the job should be automatically deleted after completion.

5. Under **Workflow Job Retention**, select **Automatically delete completed workflow jobs (to save disk space)**.
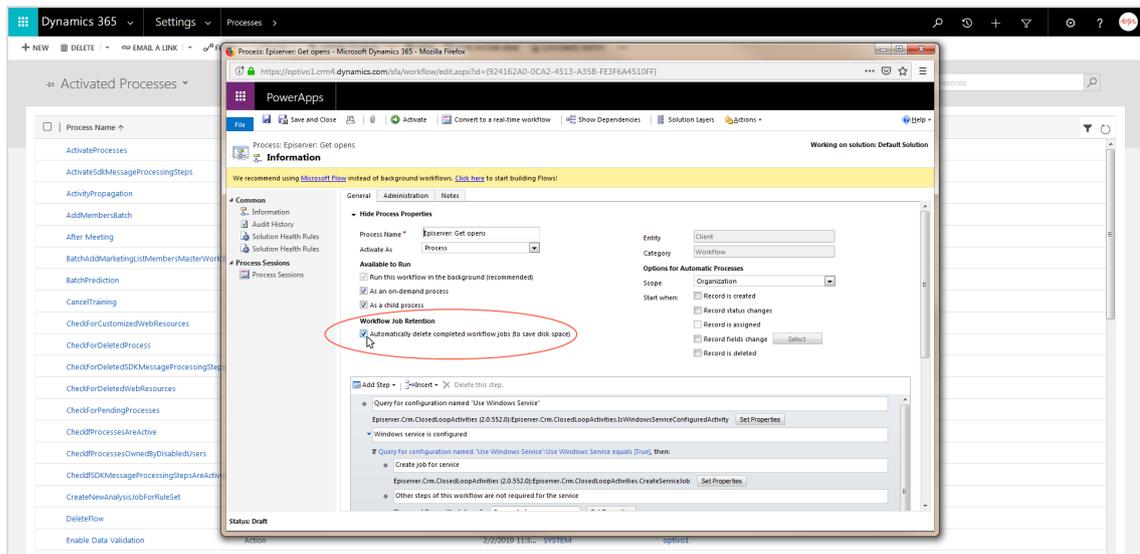
> **Note:** To select the check box you may have to deactivate the workflow for a short period. When you have selected the check box, reactivate the workflow.

6. Click **Close**.

Managing divergent time stamps

The behavior of the date fields in Microsoft Dynamics CRM can lead to divergent time stamps in CRM and Episerver Campaign. When using date fields with time specifications, use the *User Local* field type, as this will consider the time zone set for the user during data synchronization.

Do the following to check the data format in the field settings:

1. In Microsoft Dynamics CRM, locate the affected date and time field.
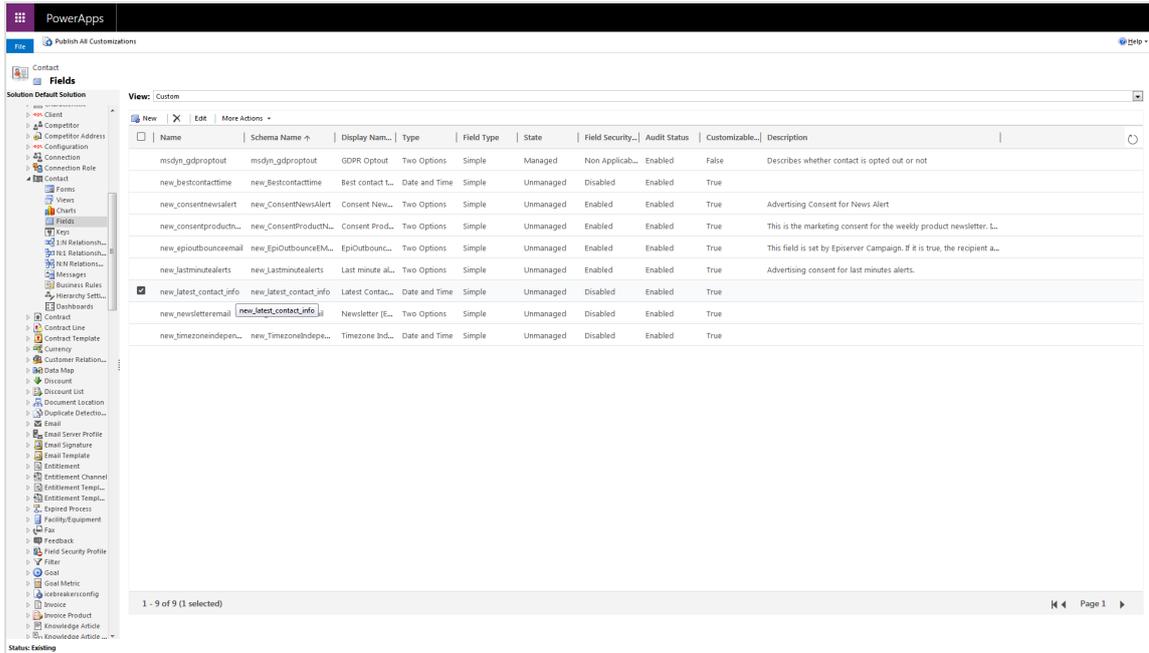
2. Edit the field, and check the properties to see if the field is defined as *User Local*.
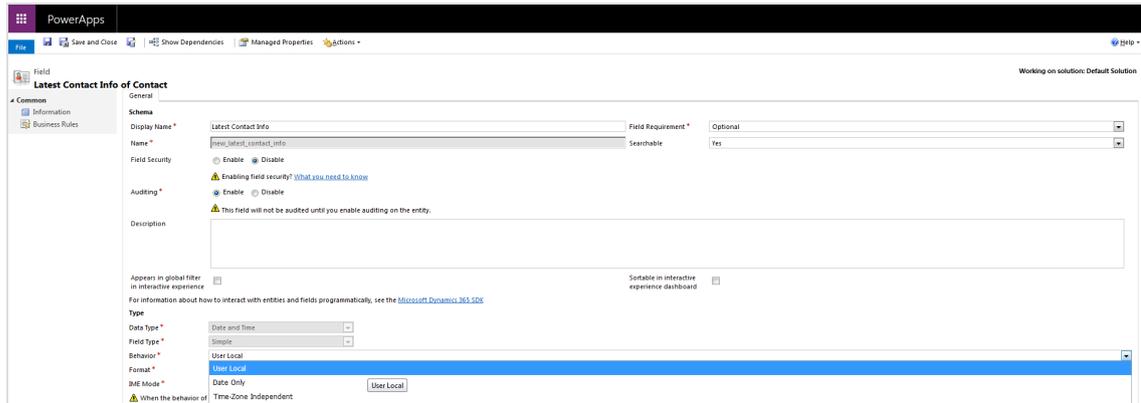
If the field is defined as *Time-Zone Independent*, it will not consider the time zone set in CRM. Episerver Campaign, will convert the time for display to the time zone of the user, so that deviations may occur.

Once the field has been saved in CRM as *Time-Zone Independent*, it can no longer be changed. In this case, the field should be deleted and recreated.

Service updates for Microsoft Dynamics 365 Online

Microsoft releases service updates for Microsoft Dynamics 365 Online on different times without an announcement. Service updates might affect the functionality of the Microsoft Dynamics CRM integration for Episerver Campaign. Episerver cannot exclude possible malfunctions in advance. For more information about service updates, see Microsoft Support.

Translation interface

> **Note:** Contact customer support to activate this feature.

The semi-automatic translation interface for Episerver Campaign lets you create and send mailings in multiple languages.

How it works

The original mailing is used as source for mailing in other languages, any mailing can be used. After you create the mailing and introduce the content, the interface requests the translation. The mailing cannot be dispatched before a translation is provided. When the translation is provided by the translation service provider, a new mailing is automatically created in the target language in your Episerver Campaign client.

Data format

Episerver Campaign creates an XML file for translation from the source mailing. The delivered data has an identical data structure within the same XML namespace.

Translation service provider

You can use any translation agency that handles XML source format to translate the content. Episerver Campaign and the translation service provider transfers the data by email. The XML source file is sent automatically to an email address provided by the translation agency and configured at setup. The translation into the target language is sent back to Episerver Campaign by email, and the translation is automatically imported.

Closed-loop interface

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

The Closed-loop interface is used for bi-directional handling of actions and data exchange between Episerver Campaign and external systems.

Installation

Contact Episerver customer support regarding setup of the Closed-loop interface, and terms and conditions that apply when accessing this type of non-anonymized action-based data.

> **Tip:** Because the response data consists of non-anonymized action-based data, you have to indemnify and hold Episerver harmless in advance from any potential liabilities and third-party claims which may result from making this functionality available to you.

How it works

The external system (the customer's system integrated with Episerver Campaign) automatically triggers mailings in Episerver Campaign. Action-based mailing data is logged in Episerver Campaign and returned to the external system. This response data can be further processed within a third system, for example a data warehouse.

The Closed-loop interface consists of these modules:

- The **import module** automatically transfers recipient data like product recommendations from for example a data warehouse system, to Episerver Campaign, and automatically triggers mailings.
- The **response data export** module transfers action-based mailing data such as openings, clicks, responses, unsubscribes, back to an external system.

The interface modules can be configured and used independently of each other.
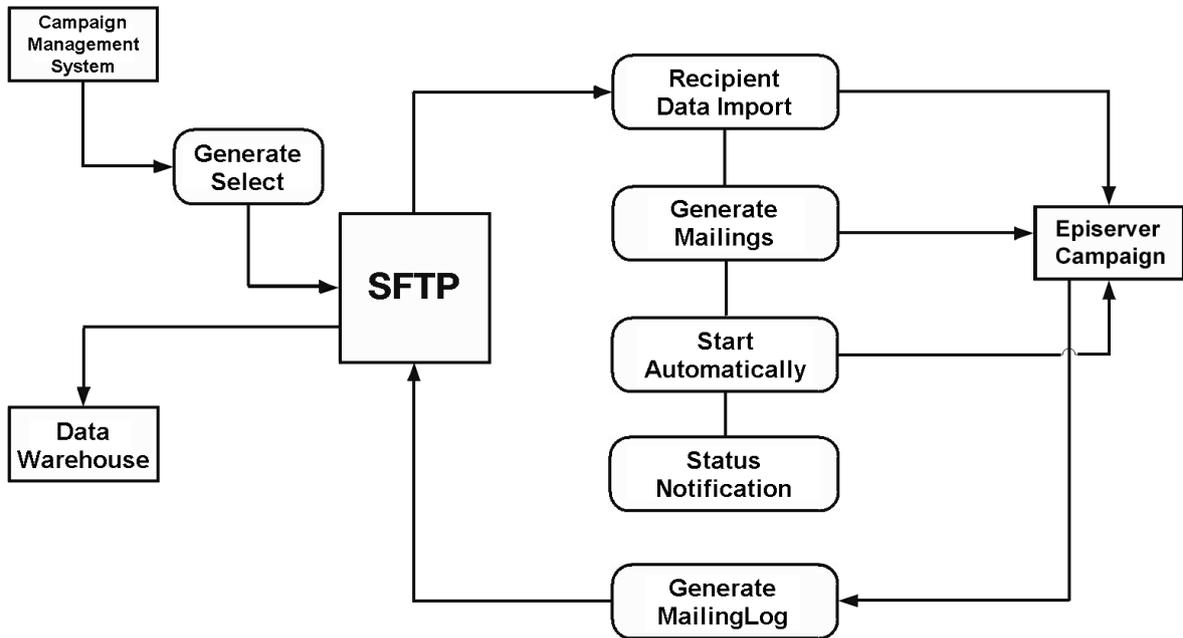
A service processes received data within Episerver Campaign. When a file is stored on the server, various jobs are being executed: Recipients are imported, mailings are created and sent, and a status notification is sent. The **response data export module** is responsible for the return channel. This module exports statistical data to the customer's system. The log data can be integrated into the data warehouse.
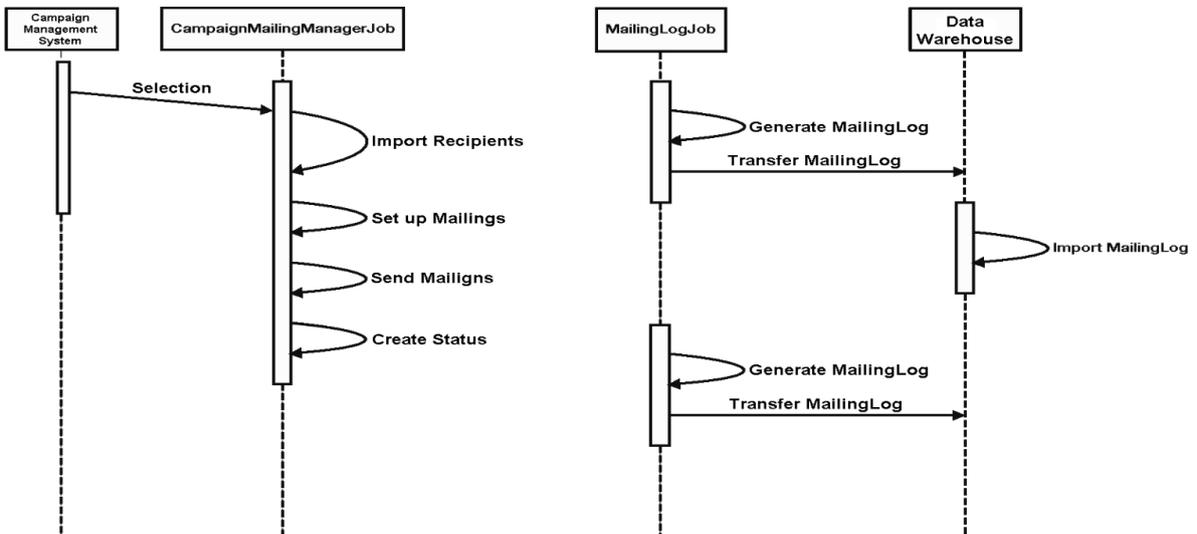
Exchanging data

The data exchange is done using an SFTP server set up at Episerver, and recipient data is transferred to that server. Response data is available for download from the same server.

Running transfers must have a *temporary file name* to avoid incomplete file exchange, see Data transfer troubleshooting. Naming conventions are described below.

> **Note:** The data exchange does not respect strict separation of clients. All user data can be transferred through one SFTP account. You can set up client-specific SFTP accounts if required for security reasons. Alternatively, you can set up separate sub-directories in one client. In both cases, the recipient data import module must then commit one file per client/directory.

Transferring recipient data

Recipient data can be transferred at any time to the Episerver Campaign SFTP server as previously described.

The name convention of the transferred files must be as follows:

```
YYYYMMDDHHMMSS_subscribers.csv
```

The recipient file is a CSV file with the following properties:

- Phrase and field lengths are variable within the limits of the recipient list.
- A semicolon (;) is used as separator.
- Line feed is used for line breaks.
- Quotation marks ("") are used as field boundaries. To designate quotation marks within a field, wrap them in quotation marks.
- The file does not contain declarations regarding columns and field lengths.
- Empty fields (NULL) remain empty in a data set. The number of field separators must be constant.

Recipient data is processed automatically every 10 minutes. The SFTP server of Episerver Campaign provides log files for download within 30 days after creation.

> **Note:** According to the specifications, fields of the main recipient list must be committed. Fields supposed to not contain any value are committed as empty columns. Existing fields and the field sequence are fixed. Do not change them without the consent of both parties.

Using personalization and recommendations

It is possible to enhance the delivered recipient data with *personalization*, for example by adding product recommendations to the mailing.

One or more fields reserved for a product ID are added to the CSV file with the recipient data. Product information (such as title, description, image-URL) for recommended products is transferred in a second CSV file. Product information is inserted into the mailing using field functions and a placeholder. Assigning product IDs to recipients is done by the customer.

With web analysis software, recommendations are available via a CSV file. Other recommended products are assigned to each product. Product information is rendered into the mailing using a special field function, similar to the process described above. You do not need to assign products to a recipient, as this is automatically done by the web analysis software in accordance with the initial configuration.

> Note: To add personalized content, you need a new template. Contact customer support.

Creating source mailings and sending mailings

As a basis for the campaign you are going to send, a *source mailing* has to be created. A so called *Master List* serves as recipient list for the source mailing. Placeholders referencing a specific field of the recipient list are inserted into the mailing paragraphs. Using these placeholders you can individually assign and insert product data and other information into the mailing.

To send multiple newsletters, or send newsletters at the same time, you have to create multiple source mailings. The source mailing is never sent and must remain in status **New**. Do not activate the mailing, otherwise the copy cannot be created. Instead the system automatically creates a copy of it and sends that, so the source mailing can be reused.

When a file containing recipient data is stored in the corresponding directory on the SFTP server, the mailing is sent. Every 10 minutes, a Cron job checks this directory for new files. If a new file exists, it is imported into the recipient list of the corresponding client, and assigned to the source mailing using the parameter BROADMAIL_ID.

There are different ways to add content to a mailing:

- **Directly from the file**. The content is imported along with the recipient data in a CSV file. This method is only applicable for *texts and hyperlinks*.
- **Referenced content**. URLs in the imported CSV files are used to reference the content. When sending the mailing, the content is retrieved from the external server of the customer through the content interface. You can add texts, pictures, attachments, and hyperlinks types of content to a mailing.

When the data is imported, the mailing is automatically sent, and gets a unique ID.

You can send *test emails* using the Closed-loop interface by storing *test data* instead of real data on the server. The CSV file must have the same structure as the file containing the real recipient data. Every time a test email is sent, a new mailing is created in Episerver Campaign.

> **Note:** Mailings are triggered *only* by storing a file on the server configured for the Closed-loop interface. You cannot send mailings by using the Episerver Campaign user interface.

You can customize the source mailing for different newsletters. Only change the source mailing after the previous mailing is sent. Additionally, ensure that the correct mailing ID of the source mailing is used in the recipient CSV file.

Troubleshooting data transfer

If a problem occurs transferring the data, a notification is sent to an email address configured beforehand. An error file is generated and the transfer stopped. During implementation you can configure the exact interface behavior in case of an error. When the implementation is completed, you can switch off this setting.

If an error occurs, the interface must be restarted in accordance with the error file. These are the cases:

- Data import failed.
- Error when mailing is started after data import.

Errors during data transfer are handled by customer support, since these can only be resolved manually.

Monitoring and sending status

After a recipient data import, the status of the process is sent via email and registered in a log file. This assures that actions within the interface are properly logged and documented in Episerver Campaign.

Structure of the main recipient list

Column name	Data type	Example	Remarks
Email	Varchar (255)	user@example.com	Email address of the user.
broadmail_ID	Bigint/Long	44018617811	Mailing ID in Episerver Campaign (broadmail_ID).

Column name	Data type	Example	Remarks
WAVE_ID	Bigint/Long	46623317811	Identifies the selection/sending wave for unambiguous assignment of user actions. This parameter is optionally set by the external system when importing the recipient data.
Salutation	Varchar (255)		Field from existing recipient list.
First name	Varchar (255)		Field from existing recipient list.
Last name	Varchar (255)		Field from existing recipient list.

Note: The list configuration described above is an example. More fields can be added if required for personalization purposes. Contact customer support before-hand, and document them in the interface setup.

Specifying response data

Response data is generated daily from the log files, and is available for download at a configured time via an SFTP server within Episerver Campaign. The files contain the most recent data. The files containing the mailing data are available for download for 30 days after starting the mailing.

The response data consists of 7 CSV files. Each of these can be read as a table as described in the following entity relationship (ER) diagram. See detailed type information for each file below.

Note: File names can be configured. The names used in the following sections are examples.
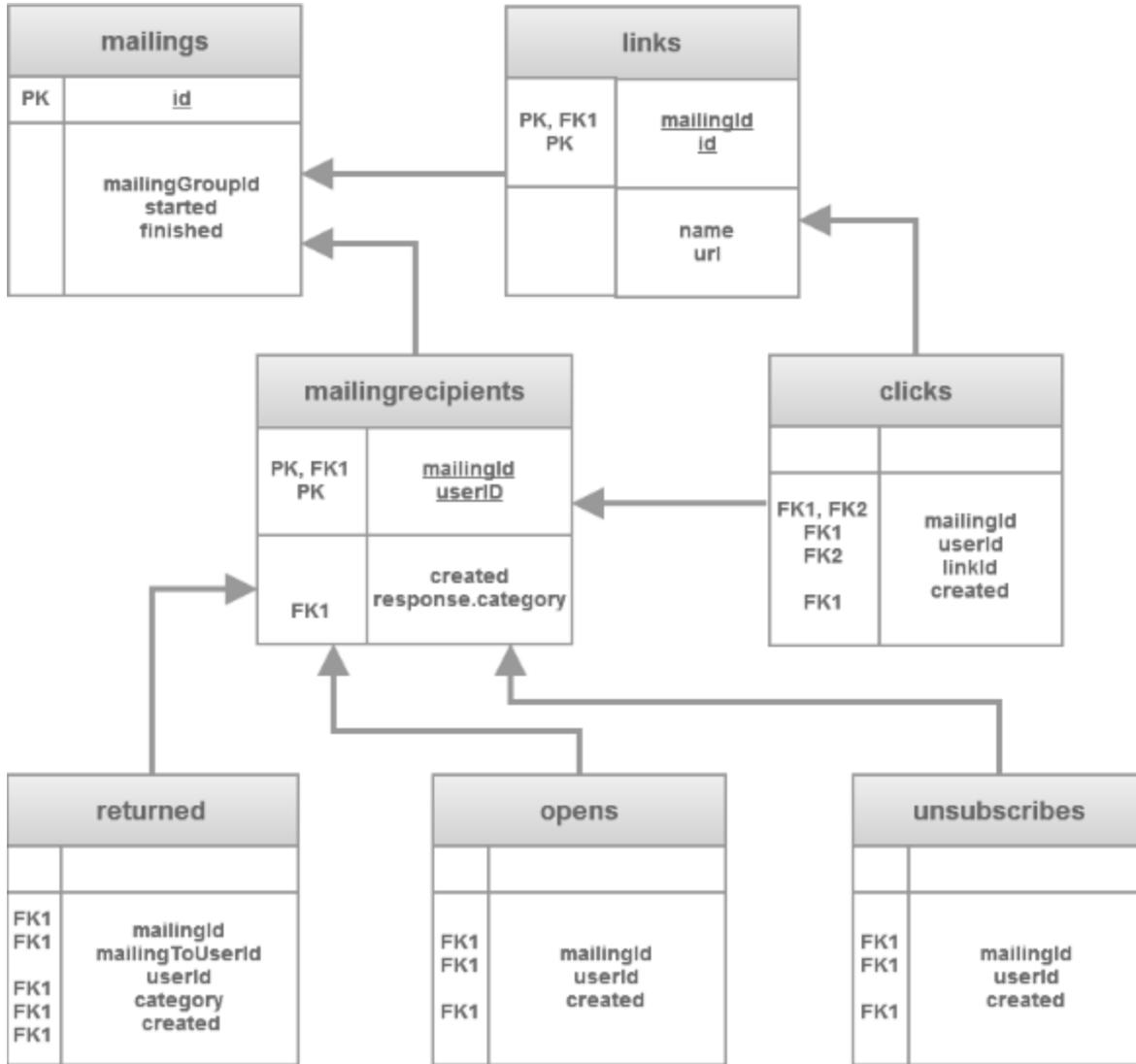
Sent mailings

YYYYMMDD_mailings.csv contains mailings sent in the referenced period.

Column name	Data type	Example	Remarks
id	Bigint/Long	51106527229	Mailing ID in Episerver Campaign

Column name	Data type	Example	Remarks
mailingGroupId	Bigint/Long	44018617811	Client ID in Episerver Campaign (broadmail_ID)
started	DateTime	2007-10-24 12:07:55	Start time of the mailing
finished	DateTime	2007-10-24 12:09:55	End time of the mailing

Sending Log

YYYYMMDD_mailingrecipients.csv contains recipient-related data. The sending log refers to the mailings contained in the file YYYYMMDD_mailings.csv.

Column name	Data type	Example	Remarks
mailingId	Bigint/Long	51106527229	Mailing ID in Episerver Campaign
userId	Varchar (255)	user@example.com	Email address of the recipient
created	DateTime	2007-10-24 12:07:55	Sending date
response.category	Varchar (20)	• unknown – The recipient sent a response to the mailing. • bounce – Soft bounce • temporary_bounce – Soft bounce • fatal_bounce – Hard bounce • autoresponder – Autoresponder	Delivery status

Links

YYYYMMDD_links.csv contains links from the mailing. Data is only available for links with *activated link tracking*.

Column name	Data type	Example	Remarks
mailingId	Bigint/Long	51106527229	Mailing ID in Episerver Campaignl
id	Bigint/Long	44018617936	Link ID in Episerver Campaign
Name	Varchar(255)	Imprint	Name of the link
url	Varchar(255)	http://www.example.com	Link target (URL)

Clicks

YYYYMMDD_clicks.csv contains mailing clicks generated by recipients, within the referenced period. Clicked links/URLs can be found in the file YYYYMMDD_links.csv.

Column name	Data type	Example	Remarks
mailingId	Bigint/Long	51106527229	Mailing ID in Episerver Campaign
userId	Varchar(255)	user@example.com	Email address of the recipient
linkId	Bigint/Long	44018617936	Link ID in Episerver Campaign
created	DateTime	2007-10-24 12:07:55	Date and time of the click. **Note:** There can be multiple clicks from one recipient within one second.

Opens

YYYYMMDD_opens.csv contains mailings opened by recipients in the referenced period.

Column name	Data type	Example	Remarks
mailingId	Bigint / Long	51106527229	Mailing ID in Episerver Campaign
userId	Varchar (255)	user@example.com	Email address of the recipient
created	DateTime	2007-10-24 12:07:55	Time and date when the mailing was opened by a recipient. **Note:** One recipient can open a mailing several times. In this case, each opening generates a singular data set.

Unsubscribes

YYYYMMDD_unsubscribes.csv contains unsubscribes by recipients in the referenced period.

Column name	Data type	Example	Remarks
mailingId	Bigint/Long	51106527229	Mailing ID in Episerver Campaign
userId	Varchar(255)	user@example.com	Email address of the recipient
created	DateTime	2007-10-24 12:07:55	Date and time of the unsubscribe

Responses

YYYYMMDD_responses.csv contains emails returned to the sender address from any user within the referenced period.

Column name	Data type	Example	Remarks
mailingId	Bigint/Long	51106527229	Mailing ID in Episerver Campaign.
mailingToUserId	Varchar (255)	25951836752	Encoded assignment of the recipient.
userId	Varchar (255)	user@example.com	Email address of the recipient.
category	Varchar (20)	- unknown – The recipient sent a response to the mailing. - bounce – Soft bounce. - temporary_bounce – Soft bounce. - fatal_bounce – Hard bounce. - autoresponder – Autoresponder.	Delivery status.
created	DateTime	2007-10-24 12:07:55	Date and time of the response.

Transferring files through SCP

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes options for transferring data files to an Episerver server. This data exchange is needed for various integrations of external systems with Episerver Campaign.

To upload or download files securely between your computer and the Episerver server, you use *Secure Copy Protocol (SCP)*, which protects data from third-party access during transmission.

To use SCP, you install an SCP program on your computer, then provide access data for the server and an authentication key. After establishing an encrypted server connection, you can securely exchange files.

These options are available:

- Configuring SCP transfer for macOS/OS X
- Configuring SCP transfer for Windows

Configuring SCP for macOS/OS X

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic explains how to configure and use secure encrypted data transfer with *macOS* (previously OS X) via Secure Copy Protocol (SCP). File transfer is often needed for data exchange when integrating external systems with Episerver Campaign.

Configuration steps

1. Creating a key pair
2. Downloading and installing Cyberduck
3. Downloading and installing Cyberduck
4. Establishing an SCP server connection

Step 1: Creating a key pair

1. From the **Utilities** folder, open **Terminal**.
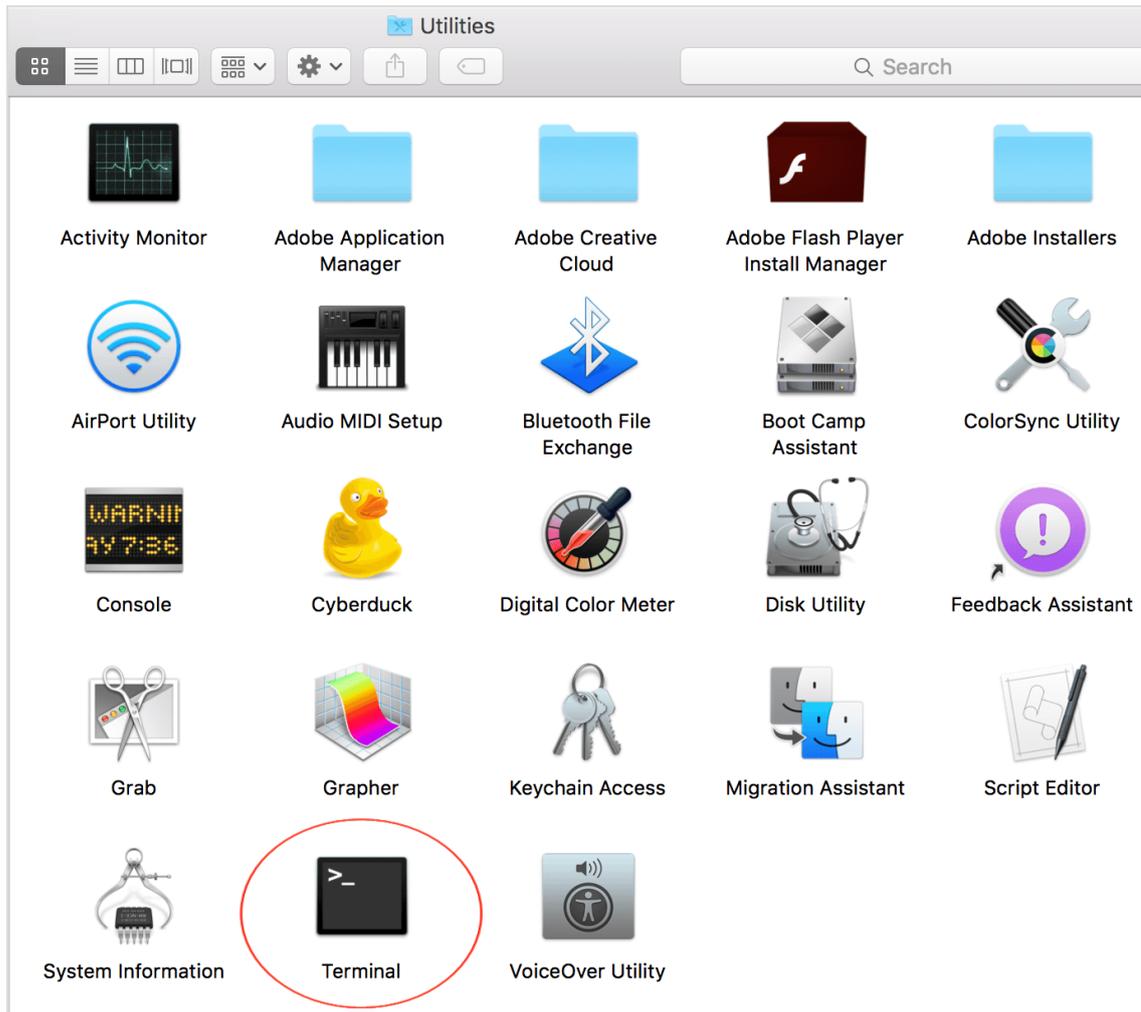
2. Enter `ssh-keygen` and press **Enter**.
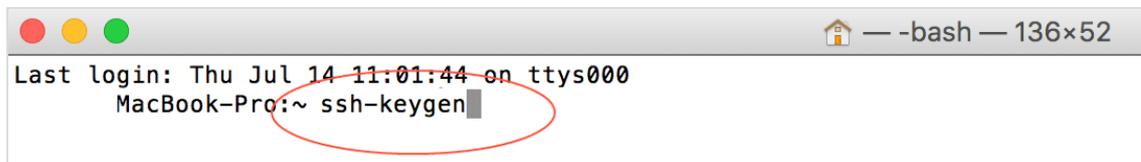
3. Enter a file path and file name for the key pair. For example, to save the key pair to your desktop in a file called **key**, enter `/Users/<name of your user folder>/Desktop/key`. Press **Enter** to confirm.

By default, **Terminal** suggests the hidden **.ssh folder** in your user folder as the file location, and the **id_rsa** as the file name. Unless changed, the key pair is saved in that directory using that file name. The *private key* is given the **id_rsa** file name, while the *public key* is assigned the **.pub** extension. In this example, the public key name is **id_rsa.pub**.

> **Note:** To see the name of your user folder, click **Go>User folder** in the **MacOS Finder** menu. Finder opens a window with the user folder name at the top.
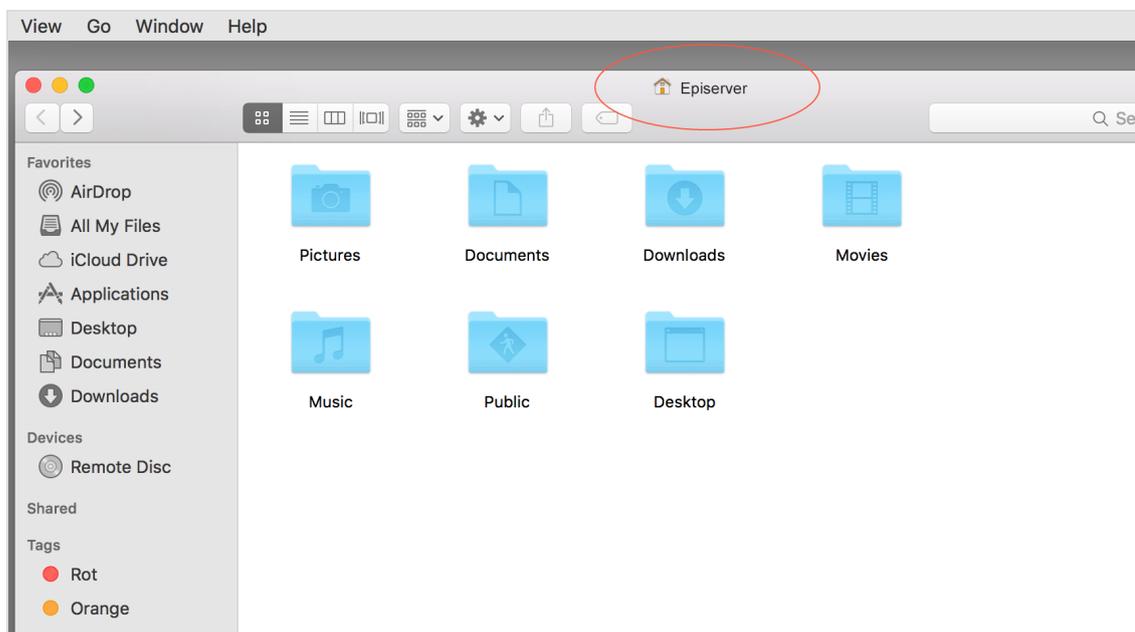
4. In the **Enter passphrase** dialog box, enter your password (not visible).

> **Note**: Remember your password, you need it later to establish a server connection.

5. Re-enter your password and press **Enter**.
6. The key fingerprint is shown in the **Terminal** window following **The key fingerprint is:**. Copy the key fingerprint to a text document and save it.
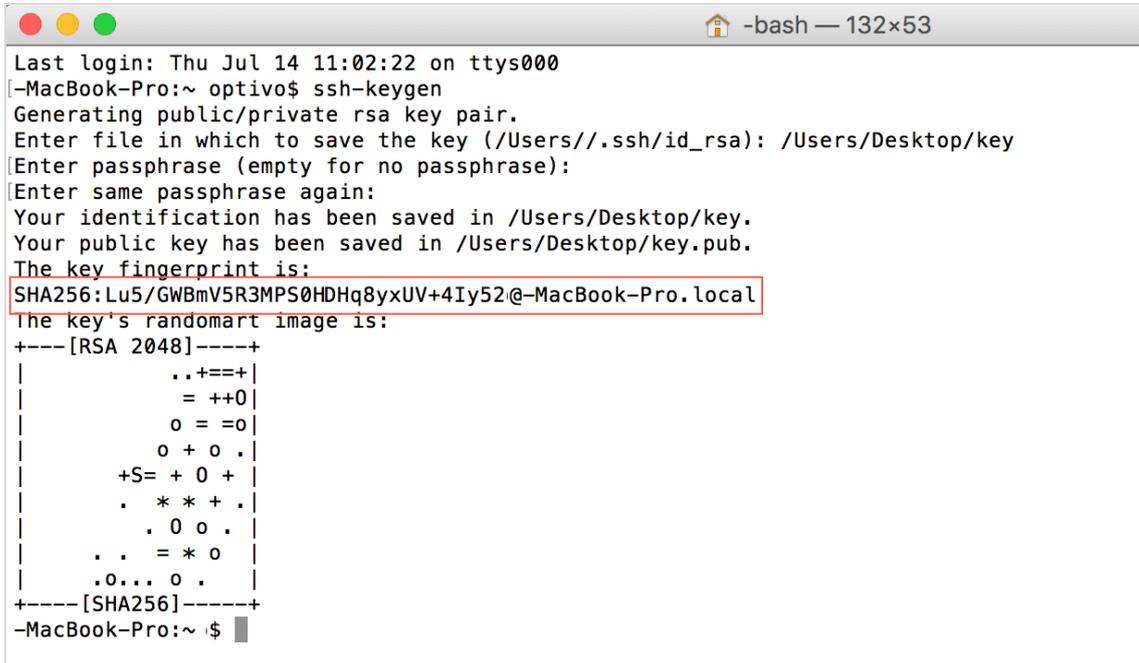
```
Last login: Thu Jul 14 11:02:22 on ttys000
[-MacBook-Pro:~ optivo$ ssh-keygen
Generating public/private rsa key pair.
Enter file in which to save the key (/Users//.ssh/id_rsa): /Users/Desktop/key
[Enter passphrase (empty for no passphrase):
[Enter same passphrase again:
Your identification has been saved in /Users/Desktop/key.
Your public key has been saved in /Users/Desktop/key.pub.
The key fingerprint is:
SHA256:Lu5/GWBmV5R3MPS0HDHq8yxUV+4Iy52@-MacBook-Pro.local
The key's randomart image is:
+---[RSA 2048]----+
|          ..+==+|
|           = ++0|
|          o = =o|
|         o + o .|
|        +S= + 0 + |
|        .  * * + .|
|           . 0 o .|
|        . .  = * o |
|         .o... o . |
+----[SHA256]-----+
-MacBook-Pro:~ $
```

Step 2: Configuring a user account for SCP access

1. Email your public key (file with .pub extension) to Episerver customer support.
2. In a *separate* email, send your key fingerprint to Episerver customer support.

> **Note**: For security reasons, do not send the public key and key fingerprint together.

3. Episerver customer support configures the account, and sends you an email with your user account data.

Step 3: Downloading and installing Cyberduck

Cyberduck is a free program used for establishing a connection to the server.

1. Using a browser, go to https://cyberduck.io.
2. Click **Download Cyberduck for Mac**.
3. When the download finishes, open the folder with Cyberduck. No specific installation is required.
4. Optional: move Cyberduck to a permanent folder, such as **Programs** or **Utility programs**.

Step 4: Establishing an SCP server connection

1. Open **Cyberduck**.
2. To create a bookmark for connecting to the server, click the plus icon **+** at the bottom.
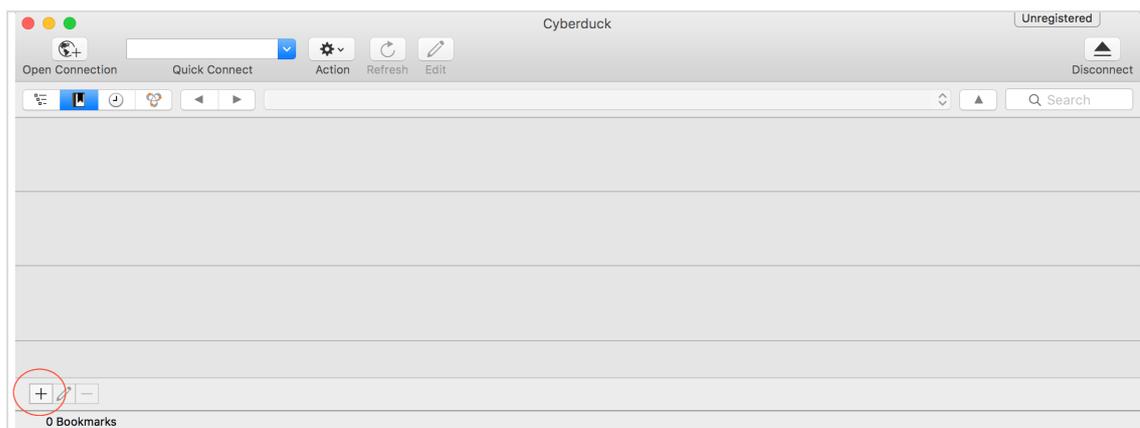
3. Click the top options menu and select **SFTP (SSH File Transfer Protocol)**.

4. Fill out the information as follows.

- **Nickame**: Enter a name to the bookmark.
- **Server**: Enter the address `ftpapi.campaign.episerver.net`.
- **Username**: Enter name as provided by Episerver.
- Open **More options** and enable **Use Public Key Authentication**.

5. Go to your private key folder and select the private key.
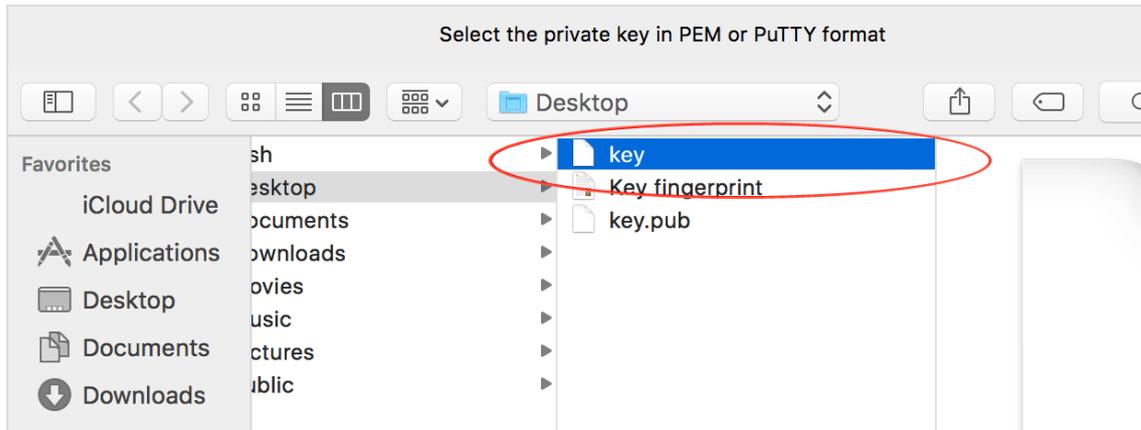
> **Note:** Do not confuse the private key with the public key. For the **Use Public Key Authentication** option, use your private key.

6. Click **Choose** on the bottom-right.

7. Close the bookmark configuration dialog box by clicking the red close button.
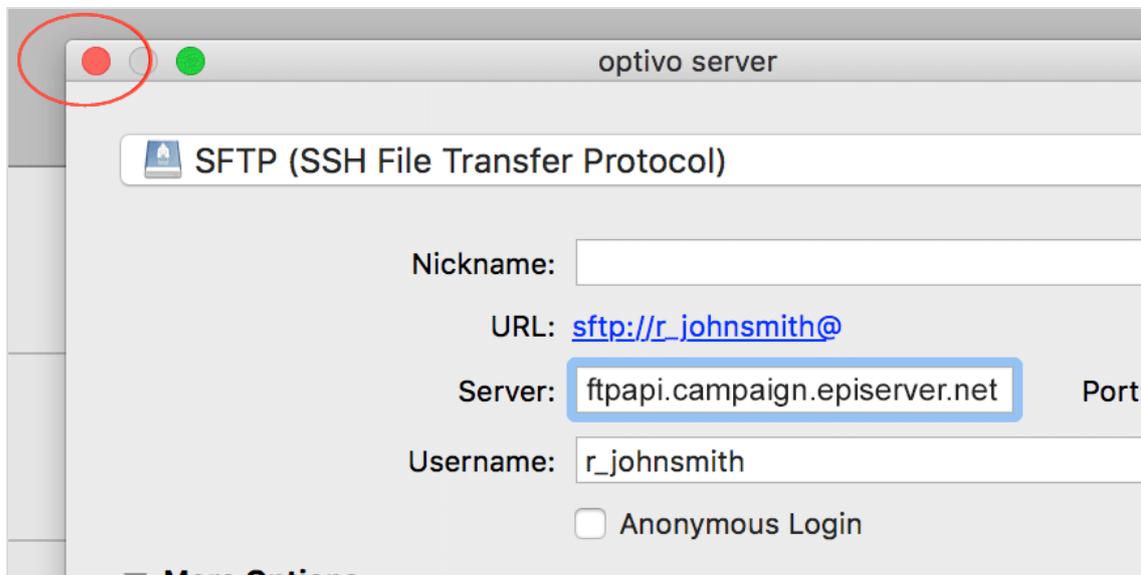
8. To establish a server connection, double-click the saved bookmark.
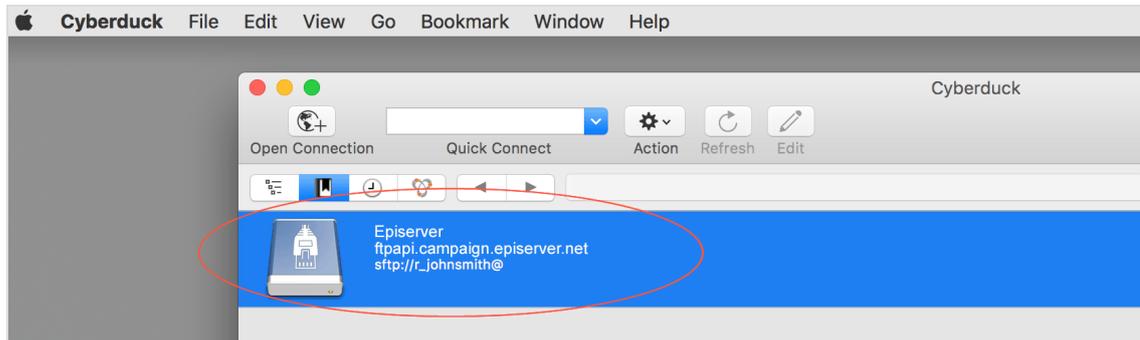
9. When prompted for a password, enter the one from **Step 1: Creating a key pair**.

Configuring SCP for Windows

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic explains how to set up secure file transfer via Secure Copy Protocol (SCP) for *Windows* using WinSCP. File transfer is often needed for data exchange when integrating external systems with Episerver Campaign.

Configuration steps

1. Downloading and installing WinSCP
2. Creating a key pair
3. Transmitting keys to Episerver
4. Establishing a WinSCP connection

Step 1: Downloading and installing WinSCP

1. Click http://winscp.net/eng/download.php.
2. Click **Download**.
3. Run the setup program.

Step 2: Creating a key pair

1. Run the **PuTTYGen** program (part of WinSCP).
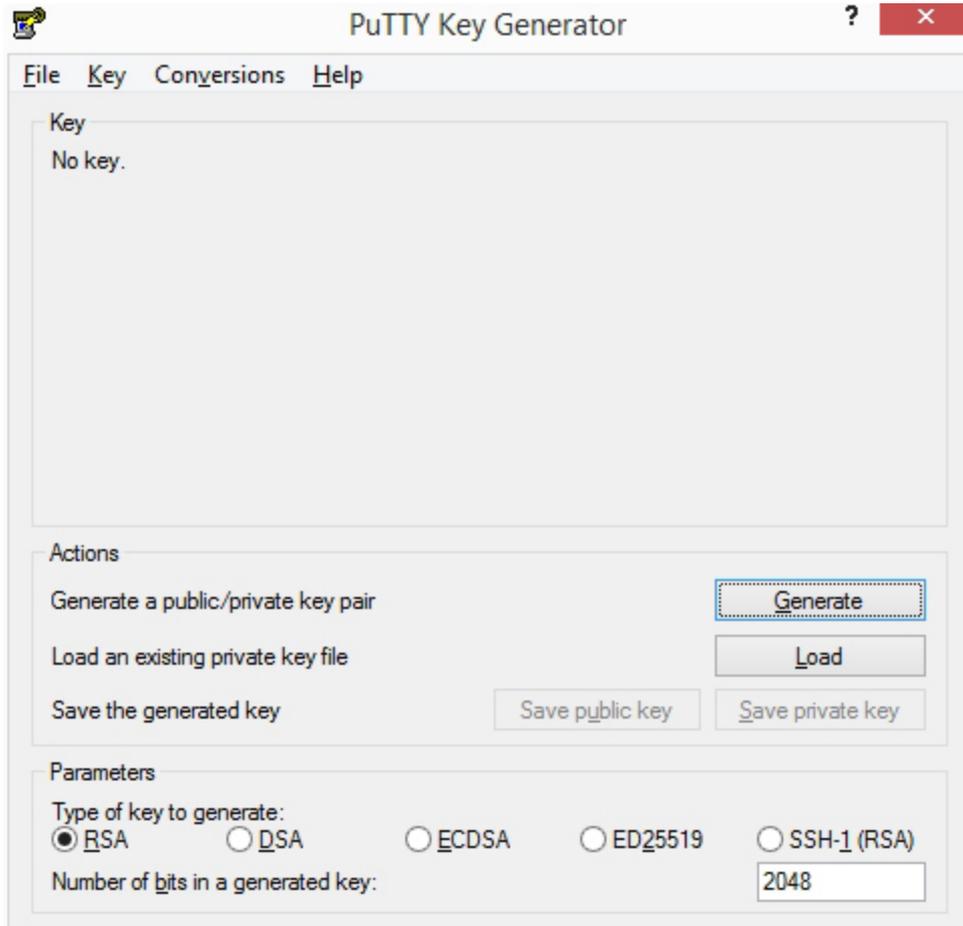
   a. **Parameters**: Select **RSA** (Episerver only supports **RSA**).
   b. **Number of bits in a generated key**: Enter **2048**.
   c. Click **Generate**.

2. Make random computer mouse movements across a gray field to generate key values. A progress bar indicates the progress.
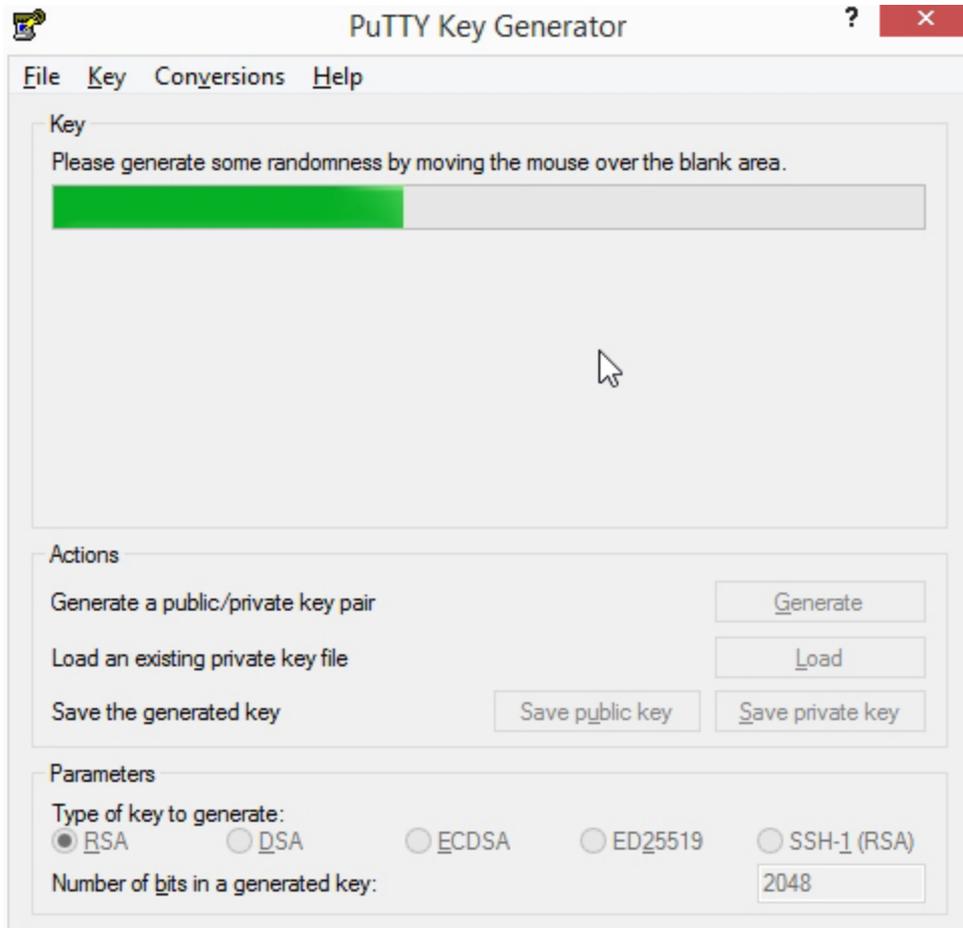
When generation is completed, the keys are displayed.
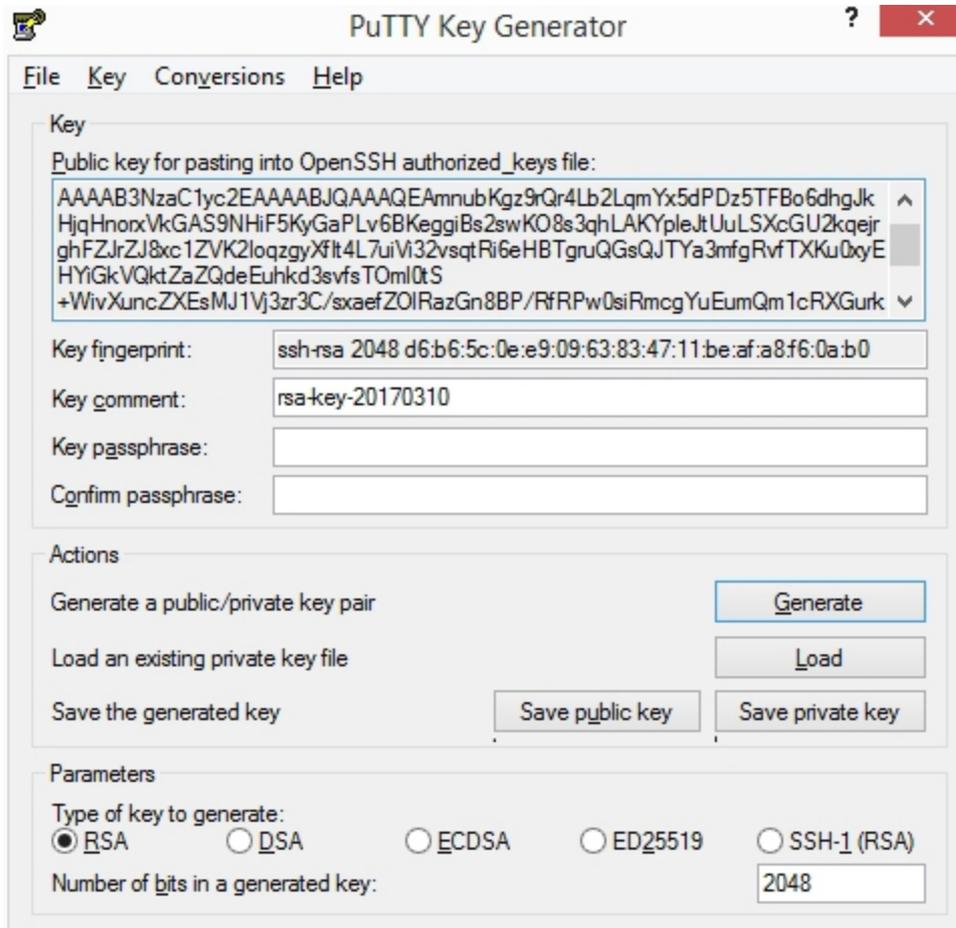
3. Fill in the fields as follows:

    a. **Key comment**: Enter a description such as "Episerver Campaign-<your_companyname>".

    b. **Key passphrase**: Enter a password. For security reasons, use at least an eight-digit word containing letters, numbers and special characters.

    c. **Confirm passphrase**. Enter the password again.

4. Click **Save public key**.

5. Click **Save private key**.

Step 3: Transmitting keys to Episerver

1. Copy the public key and email it to Episerver customer support.
2. Copy the key fingerprint and email it *separately* to Episerver customer support.

> **Note:** For security reasons, do not send the public key and key fingerprint together.

3. Episerver sends a confirmation when your SCP (Secure Copy Protocol) access is active.

> **Note:** Protect your keys from unauthorized access. If lost, immediately contact Episerver and generate a new key pair as described above.

Step 4: Establishing a WinSCP connection

1. Launch the WinSCP program.
2. In the login window, click **New Site**.
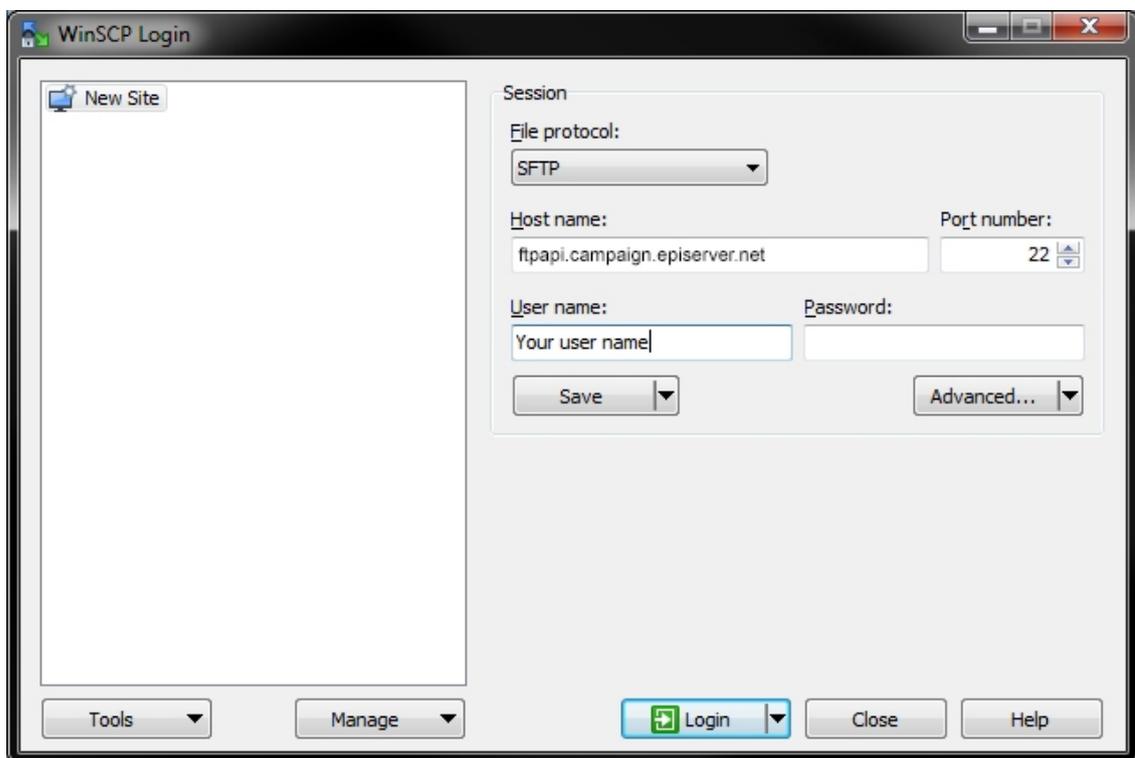
3. Fill out the information as follows.

- **Host name**: Enter **ftpapi.campaign.episerver.net**.
- **User name**: Enter name as provided by Episerver.

4. Click **Advanced…**

5. Select **Environment** > **SFTP** and enable **Allow SCP fallback**.
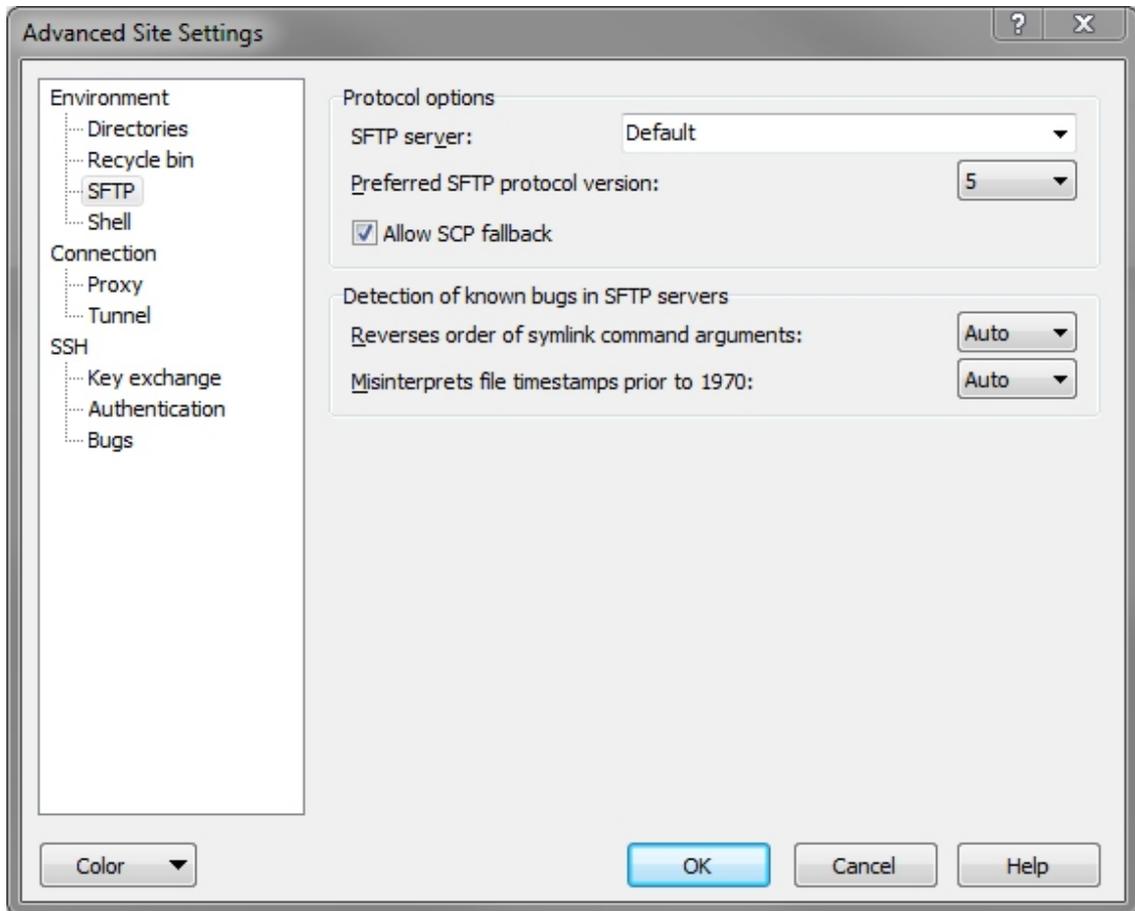
6. Select **SSH > Authentication**, click **Browse (…)** in **Private key file** and select the previously generated private key.
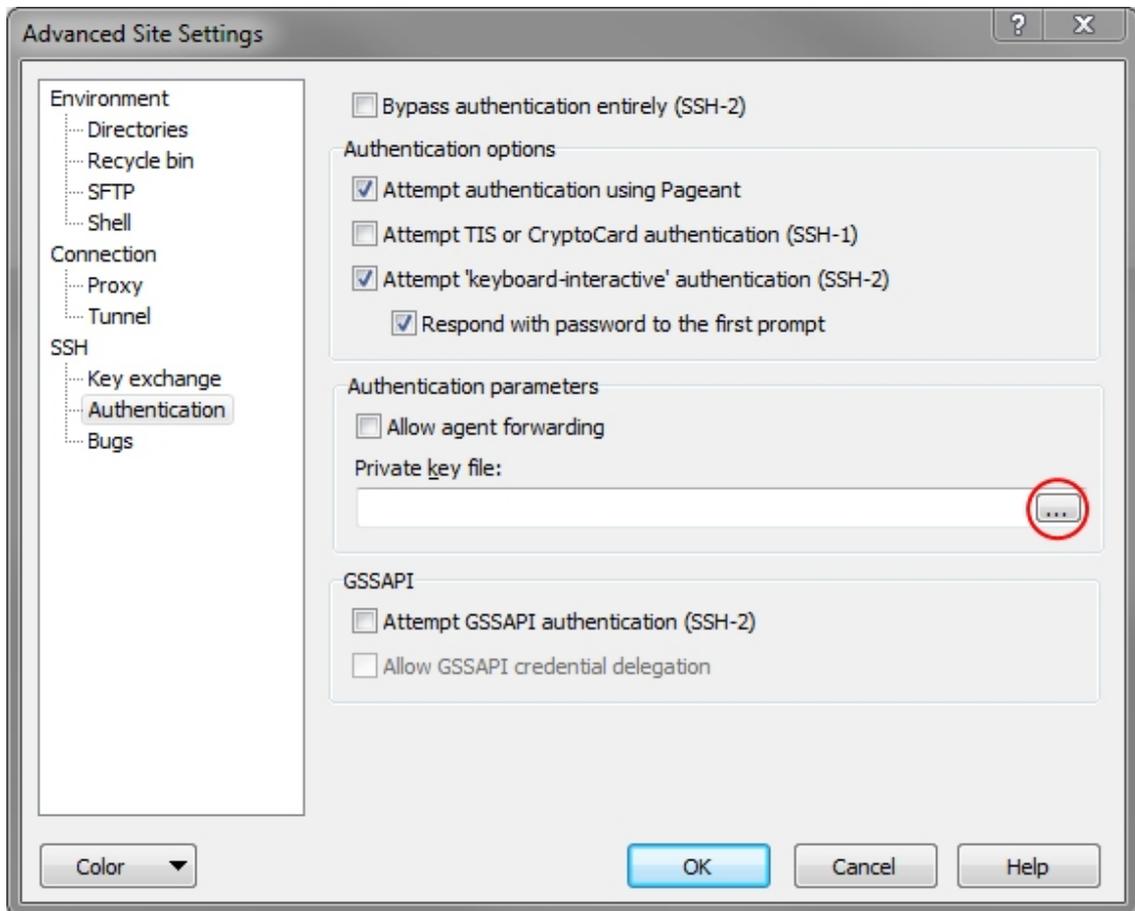
7. Click **OK**.
8. Click **Save**, enter a name for the connection, and click **OK**.
9. In the **WinSCP login** window, select the connection name and click **Login**.

Real-time export of event data via webhooks (Beta)

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

This topic describes how to manage webhooks using the REST API documentation on Episerver World to export event data in real time. As soon as a user performs an action, such as opens or clicks, you immediately receive the corresponding event data.

Using the Episerver Campaign REST API, you can create webhooks, retrieve webhook information, activate, deactivate and delete webhooks.

Creating a webhook

Prerequisite: You must set up the REST API in your client. See REST API on Episerver World.

1. Open the operation Create a webhook and click Try it out.
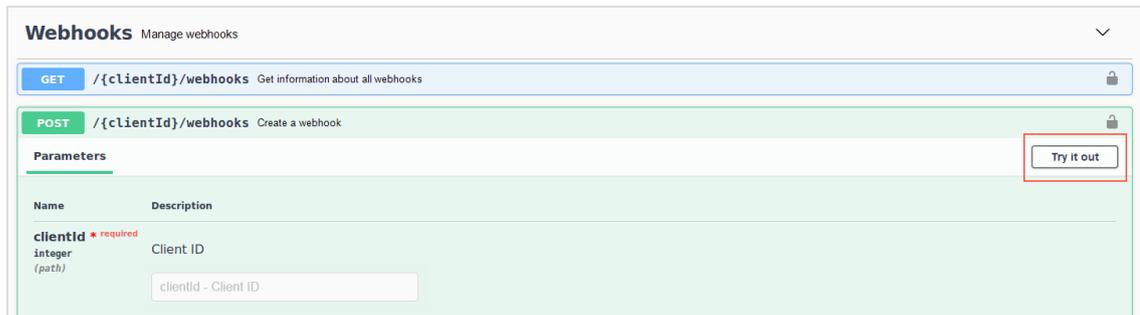
2. Enter the following information in the corresponding mandatory fields:

   - clientID. Your client ID. To see the client ID, go to start menu > Administration > API overview > SOAP API.
   - targetUrl. The URL to which the event data is to be sent.

     Prerequisites:

     - URL must be accessible and able to receive data via HTTP POST requests from the IP address 193.169.180.1 at any time
     - current HTTPS version and standard port 443 for HTTPS connections

   - type. The type of the event data to be sent.

     > Note: Real-time export of event data is currently possible for *opens* and *clicks*.

   - format. The data format in which the event data is to be sent.

     > Note: The following data format is currently available: *JSON*.

3. To create the webhook, click **Execute**. If the creation was successful, you receive the HTTP response status code 201.

4. To retrieve information of the created webhooks, execute the operation Get information about all webhooks.

You can find the following information in the **Response body**:

- **id**. Webhook ID
- **type**. Type of the event data
- **status**. Webhook status
- **format**. Data format of the event data
- **created**. Creation date of the webhook
- **modified**. Modification date of the webhook

> **Tip:** You need the webhook ID for [activating](#), [deactivating](#) and [deleting](#) the webhook.

Activating a webhook

To export event data in real time, you must activate the corresponding webhook. Do the following:

1. Open the operation [Activate a webhook](#) and click **Try it out**.

2. Enter the following information in the corresponding mandatory fields:

   - **clientID**. Your client ID. To see the client ID, go to start menu > **Administration** > **API overview** > **SOAP API**.
   - **webhookId**. The ID of the webhook you want to activate. You can retrieve the webhook ID with the

operation [Get information about all webhooks](#).

3. To activate the webhook, click **Execute**. If the activation was successful, you receive the HTTP response status code 200.

As soon as a mailing recipient performs an action, Episerver Campaign sends the corresponding event data via a HTTP POST request to the target URL. The event data is sent in batches consisting of a maximum of 100 events each.

> **Note:** After successful data receiving, the target URL must return the HTTP response status code 200. Otherwise the export is retried every 10 seconds. If no data can be delivered three days after the event is created, the event is discarded.

Example of event data (opens) in JSON format:

```json
{
  "type":"open",
  "recipientId":"123456789005",
  "userListId":123456789003,
  "remoteAddress":"0.0.0.0",
  "clientId":123456789001,
  "mailingId":123456789004,
  "created":1564590054000,
  "subscriptionId":1234567,
  "mailId":"3IHQ2XT8-38PY7WFQ-XKNQSY",
  "device":"desktop",
  "operatingSystem":"Windows 10",
  "browser":"Firefox 64.1"
}
```
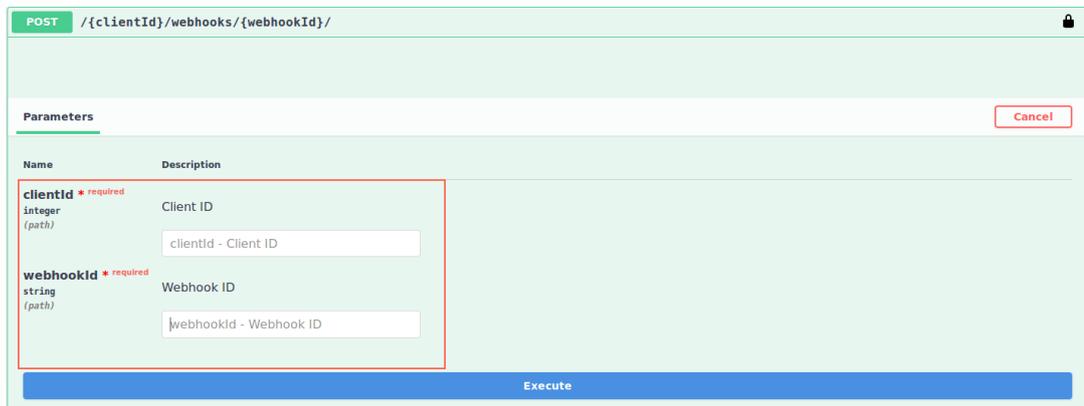
Deactivating a webhook

If you no longer want to export event data, you must deactivate the webhook. The webhook still exists and you can reactivate it later. Do the following:

1. Open the operation **Dectivate a webhook** and click **Try it out**.

2. Enter the following information in the corresponding mandatory fields:

   - **clientID**. Your client ID. To see the client ID, go to start menu > **Administration** > **API overview** > **SOAP API**.

   - **webhookId**. The ID of the webhook you want to deactivate. You can retrieve the webhook ID with the operation **Get information about all webhooks**.
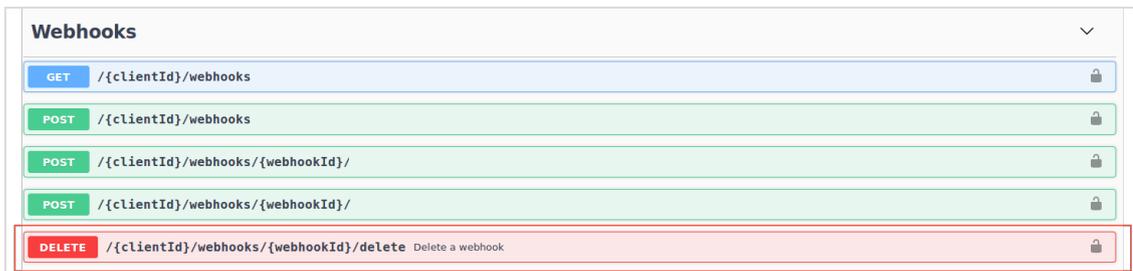

3. To deactivate the webhook, click **Execute**.

Deleting a webhook

For example, if you no longer need a webhook or want to create new webhooks, but the creation limit per client is reached, you can delete webhooks. Do the following:

> **Note:** You can only delete deactivated webhooks. See **Deactivating a webhook**.

1. Open the operation Delete a webhook and click **Try it out**.

2. Enter the following information in the corresponding mandatory fields:
   - **clientID**. Your client ID. To see the client ID, go to start menu > **Administration** > **API overview** > SOAP API.
   - **webhookId**. The ID of the webhook you want to delete. You can retrieve the webhook ID with the operation Get information about all webhooks.

3. To delete the webhook, click **Execute**.

API overview

> **Note:** This topic is for administrators and developers with administration access rights in Episerver Campaign.

The **API overview** provides access to specific data like URLs, IDs and authorization codes required when integrating Episerver Campaign using for example REST and SOAP APIs.

See also API documentation on Episerver World:

- REST API
- SOAP API
- HTTP API
- SMTP API

Information in the API overview

To open the API overview, open the start menu and select **Administration** > **API overview**.
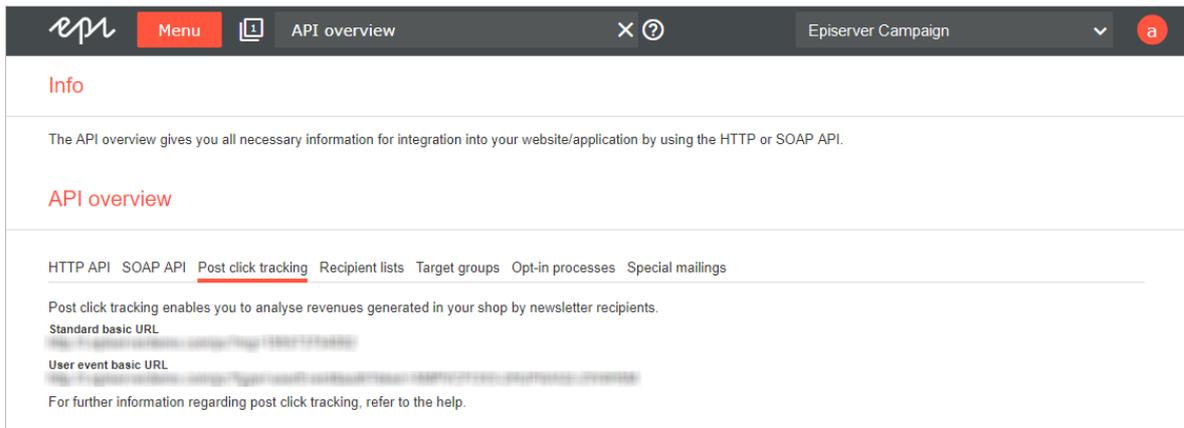
HTTP API

Here you find a link to the HTTP API user guide with more information and examples.

SOAP API

The ID of the client you are logged in to and a link to the SOAP API user guide.

Post-click tracking

- **Standard basic URL**. The default URL for the tracking of post-clicks.
- **User event basic URL**. The URL for the tracking of post-clicks that are not related to a mailing.

Recipient lists

Overview of the recipient lists in your client, and information required for the HTTP and SOAP APIs.

You can also manage **authorization codes** for recipient lists:

1. Select a recipient list in the listing.
2. Click **Manage authorization codes**.
3. Click **Create authorization code** to add a new code for the recipient list. Or, select an authorization code in the list and click **Deactivate authorization code**, to deactivate it.

Target groups

Target groups are available in your client, with information required for the HTTP and SOAP APIs.

Opt-in processes

Opt-in processes are available in your client, with information required for the HTTP and SOAP APIs.

Special mailings

Special mailings are available in your client, with information required for the SMTP API.

Service and support

This section provides contact details of the Episerver customer support if you have any questions or problems. You can also find out about Episerver's wide range of services such as training or the full-service dispatch.

- **Customer support**. Contact details of the Episerver customer support.
- **Full-service dispatch**. Mailing dispatch by Episerver.
- **Trainings**. Recorded video trainings and individual trainings.

Customer support

Your country	Product	Email ✉	Telephone 📞	Availability
Germany, Austria, Switzerland	Campaign	campaignsupport@episerver.com	+49 (0)30-76 80 78 400	Monday to Friday, 9 a.m. to 6 p.m. (CET)
	Any other	support@episerver.com	See the support portal	
All others	Any			

Full-service dispatch

If you want to send mailings to your customers at regular intervals but do not have time to import new recipients, create new mailing content, and run a quality check before sending a mailing, use Episerver's full-service mailing dispatch. Supply Episerver with addresses, the latest content, and your newsletter template, and Episerver takes care of the rest, including reporting after the process is finished. To ensure quality, Episerver sends a test mailing for your approval prior to the actual dispatch.

And, you can use the layout for subsequent newsletters – just supply Episerver with updated content.

Needed information

Episerver needs the following information to generate a full-service mailing dispatch:

- **Recipient data and test recipients** as a CSV file (containing at least an email address)

  - For a personalized mailing, include a salutation or title, first and last name, and other desired criteria.
  - If target groups are being used, include supplementary columns (for example, only distribute to recipients who specified "mobile device" when registering, or addresses whose code that starts with **49**)

- **Newsletter template** as an HTML file or graphic.
- **Subject line** for the mailing.
- **Sender** (such as *Your Company Product News*) and return address (such as *news@example.com*).

  > **Note:** You need to [delegate the sending domain to Episerver beforehand](#). This can take up to 72 hours; Episerver cannot control the time required. Also, you cannot use a domain delegated to Episerver for any other purpose (for example, as a log-in page), because the selection would produce no response. If you cannot delegate a sending domain, contact [customer support](#).

- **Email address** for replies.
- Current content, where it differs from the template.
- Planned **dispatch date**.

To avoid complaints about unsolicited emails, observe these guidelines:

- You received an [opt-in](#) for all addresses, confirming the recipients' desire to receive promotional emails.
- Episerver may require confirmation of this approval.

Lead time

Plan sufficient lead time to ensure that you can send mailings on schedule. When Episerver has all necessary information, Episerver creates a timetable containing:

- Date for sending a test mailing
- Date by which correction requests must be submitted
- Date by which corrections are incorporated and a second test mailing is sent
- Date by which mailing must be approved
- Date for sending actual mailing

Allow approximately five working days to evaluate the test mailing, incorporate correction requests, and provide final approval.

What Episerver does for you

After you supply Episerver with information and the planned sending date, Episerver does the rest. This includes:

- **Scheduling**. Sends you a schedule showing when

  - the mailing is ready for testing
  - your correction requests must be submitted
  - corrections are incorporated
  - your final approval is needed

- **Address check**. Checks for problem addresses before importing recipients. If a significant number of addresses may be a problem, Episerver contacts you.
- **Importing addresses**. Compiles a recipient list that matches your address list, then imports recipients.
- **Creating the mailing**. Creates a multi-stage mailing based on your newsletter template. Any graphics included in the template increase your cost. So, it is best to include graphics as HTML files in the newsletter template.
- **Modifying content**. Incorporates the new text and images if current mailing content differs from the template.
- **Testing and quality control**. Tests mailing before it is sent to test recipients. Episerver checks whether major providers and freemailers (T-Online, web.de, GMX, and so on) deliver the mailing to intended inboxes, or if spam filters catch any of them, and whether the contents are displayed correctly.
- **Sending test emails**. When your mailing passes quality control, it is sent to the supplied test recipients. You screen the content one last time. After that, either send Episerver your correction requests, or notify Episerver by email your approval of the mailing.
- **Incorporating corrections**. Incorporates your changes into the mailing and sends it to test recipients a second time.
- **Mailing to a distribution list**. When Episerver receives your final approval, the mailing is sent to recipients on the distribution list as scheduled.
- **Sending report**. Within two work days of the sending date, you receive an initial report containing the following information (in both diagrams and data). You get a final report within ten work days.

  - Recipients
  - Emails opened

    - unique opens
    - opens over time

  - Opening rate (%)

- Clicks

  - unique clicks
  - clicks over time
  - total clicks by link

- Click-rate (%) and effective unique click-rate (%)
- Number of returned emails and returned email rate (%)
- Number of unsubscriptions and unsubscribe rate (%)

Trainings

Let the professionals educate you - live or via recorded video training. Episerver offers a range of regular and customized training formats aimed at both beginners and experienced users. If you would like individual training, please contact customer support.

Individual trainings

Web-based

With an individual, web-based training you will learn how to use the software in a very short time. The training courses are held for up to five participants with the help of the web learning software Zoom. Episerver uses realistic scenarios to teach the basic functions of Episerver Campaign. If you would like to add more topics to the training, you can discuss the content with the trainer in advance and make an appointment. The training courses last from one and a half hours to a maximum of two hours. The participants need a telephone and Internet access for the briefing.

On-site

This training format is suitable for getting to know the software intensively and for conveying special scenarios. Episerver develops a training program with tasks and gives an intensive introduction into the use of Episerver Campaign. The standard modules include recipient import and administration, creating and sending mailings, creating and interpreting reports. On request, we can integrate content and exercises into the training that correspond to your specific application scenarios. After the training, all participants receive handouts. The training is designed for a maximum of five participants. Premises, a projector, a computer for the trainer and, if possible, one computer for each participant (all computers must have an Internet connection) are provided by you.

Episerver Digital Experience Cloud

The Episerver Digital Experience Cloud™ unifies digital content, commerce and marketing in one platform, including omnichannel solutions for intelligent campaigns. The platform uses artificial intelligence and behavioral analytics to deliver personalized experiences everywhere. With our secure, reliable platform you can quickly increase engagement, revenue and productivity, while getting the fastest time to value.

About Episerver

At Episerver, we believe digital transformation is a journey. We have been guiding customers for more than 20 years in providing standout digital experiences. Today our network of 880 partners, in 30 countries, supports 8,000 customers and over 30,000 websites. Founded in 1994, Episerver has offices in the US, UK, Sweden, Australia, Germany, Denmark, Finland, Norway, Poland, the Netherlands, Spain, South Africa, Singapore, Vietnam and the UAE.

For more information, visit **episerver.com.**