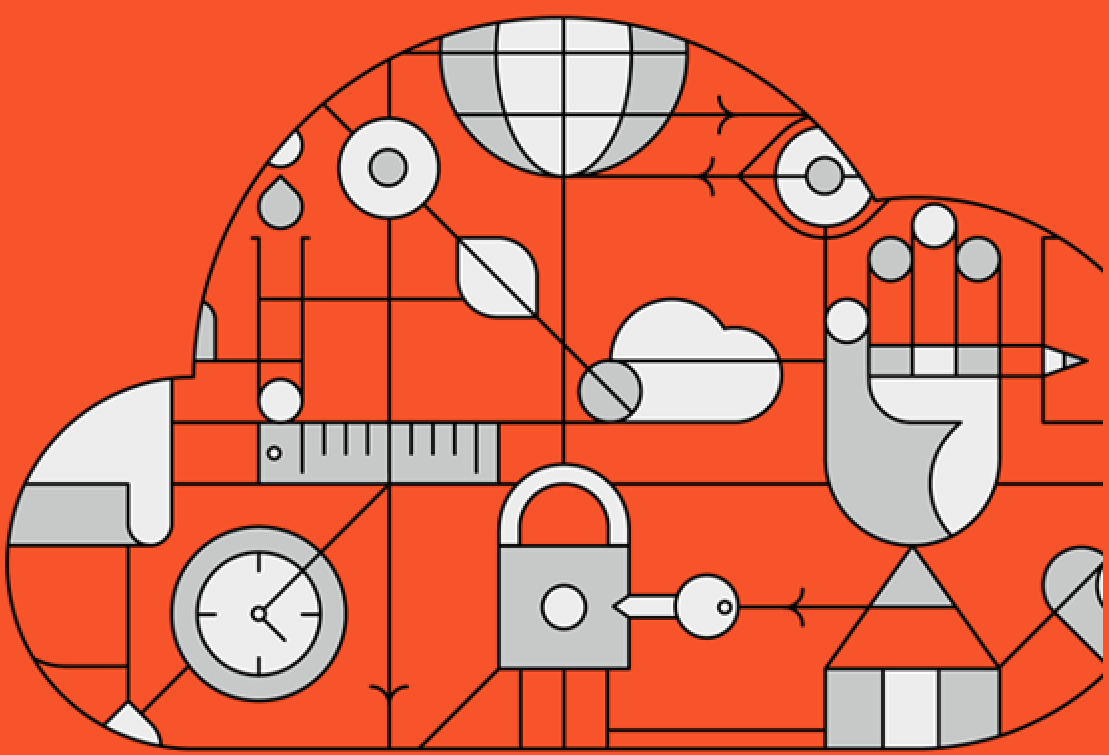
Episerver Campaign

Integration and Interfaces



Digital Experience Delivered.™

Episerver Campaign Integration and Interfaces

Version 6.70

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Integration and interfaces

In this document you'll learn all about Episerver Campaign's various integration options and interfaces. Here you can look up information on how to link your CRM, web analytics program or product database with Episerver Campaign. Additionally, this section will give you full information on how to control Episerver Campaign from an external system.

- File exchange via SCP. Loading files onto the Episerver server via SCP
- Web analytics. Linking web analytics programs to Episerver Campaign
- CRM. Linking CRM systems to Episerver Campaign
- Translation interface. Creating multilingual mailings
- Closed Loop Interface. Linking data warehouses to Episerver Campaign.
- SMTP API. Dispatching via SMTP API

For information about the SOAP or HTTP API, see the Episerver Campaign SOAP API and Episerver Campaign HTTP API manuals.

File exchange via SCP

In the following sections, you will learn how to download files securely to the Episerver Server or download them from the Episerver Server. The documentation is available to Windows users and to Mac users.

- FTP access via SCP (Windows)
- FTP access via SCP (macOS/OS X)

FTP access via SCP (macOS/OS X)

An encrypted mode is used for data transfer between your computer and the server – the secure copy protocol (SCP). SCP protects your data from access by third parties during transmission. To work in this encryption mode, you will need:

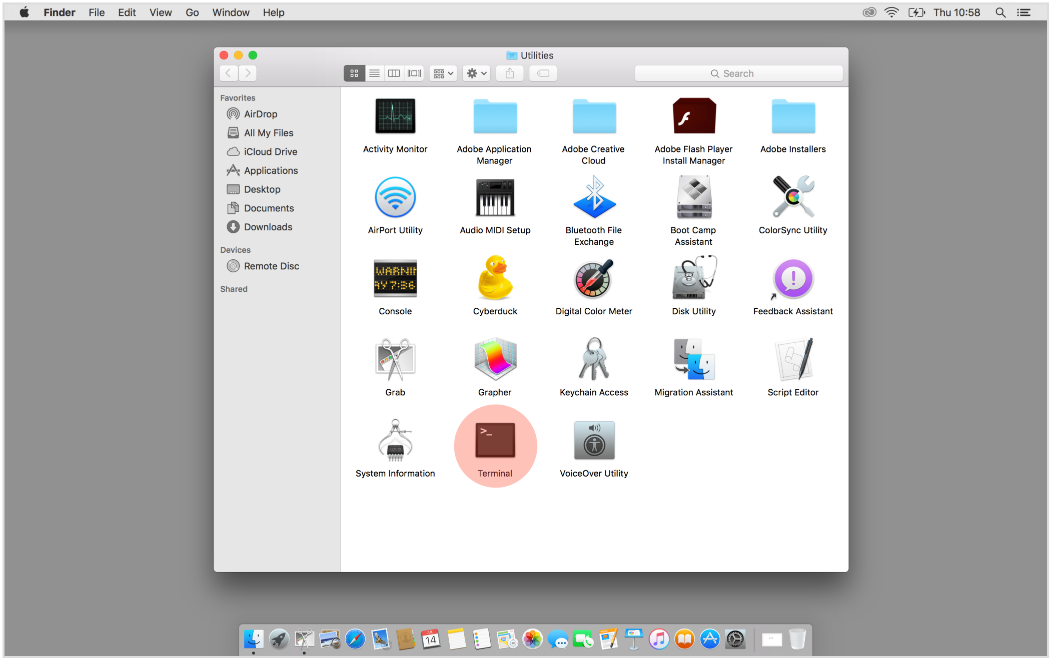
1. a key pair for authentication on the server,
2. a user account for accessing the server,
3. the free program Cyberduck, to establish a connection to the server.

The next four steps will demonstrate how to configure and use encrypted data transfer in macOS (previously OS X).

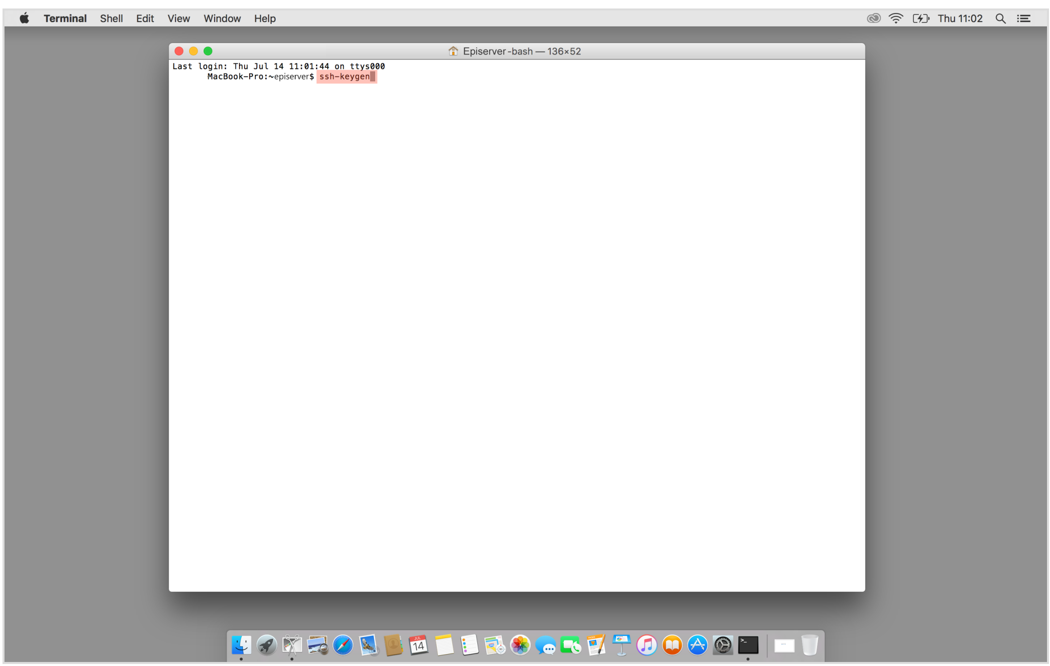
Step 1. Create a key pair

To create a key pair for authentication on the server, perform the following steps in macOS:

1. Open the **Terminal** program. The **Terminal** program is located in the **Utilities programs** folder on your Mac.



2. Enter the following command: `ssh-keygen`. Confirm your entry with the enter key.

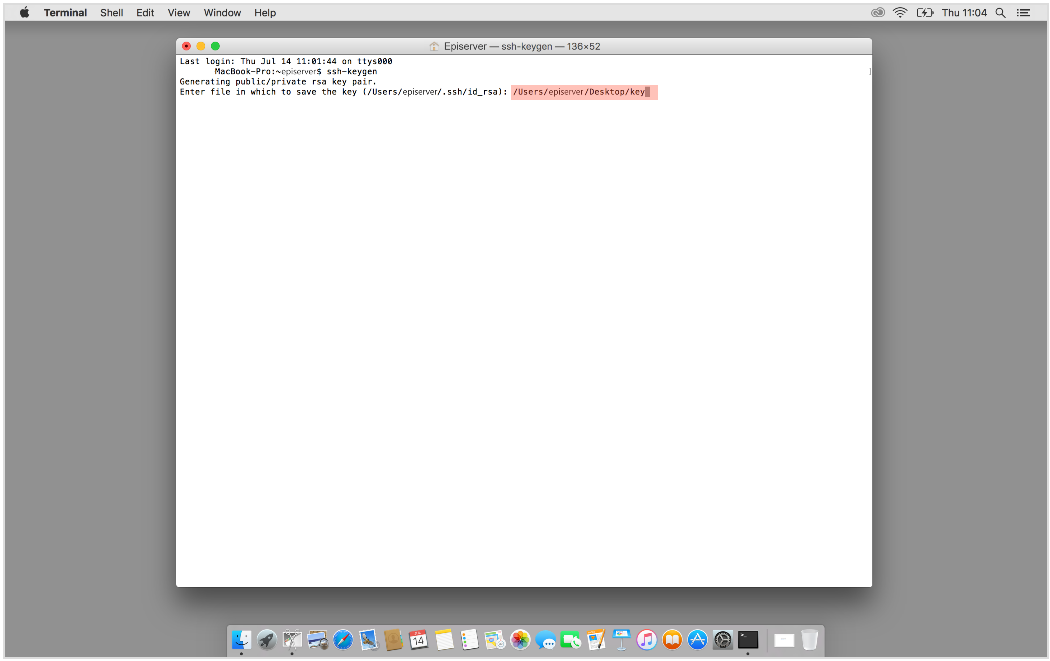


You will be prompted to enter a storage location and a file name for the key pair.

3. Enter a storage location and a file name for the key pair. If, for instance, you wish to save the key pair to your desktop in a file called **key**, enter the following:

```
/Users/<name of your user folder>/Desktop/key
```

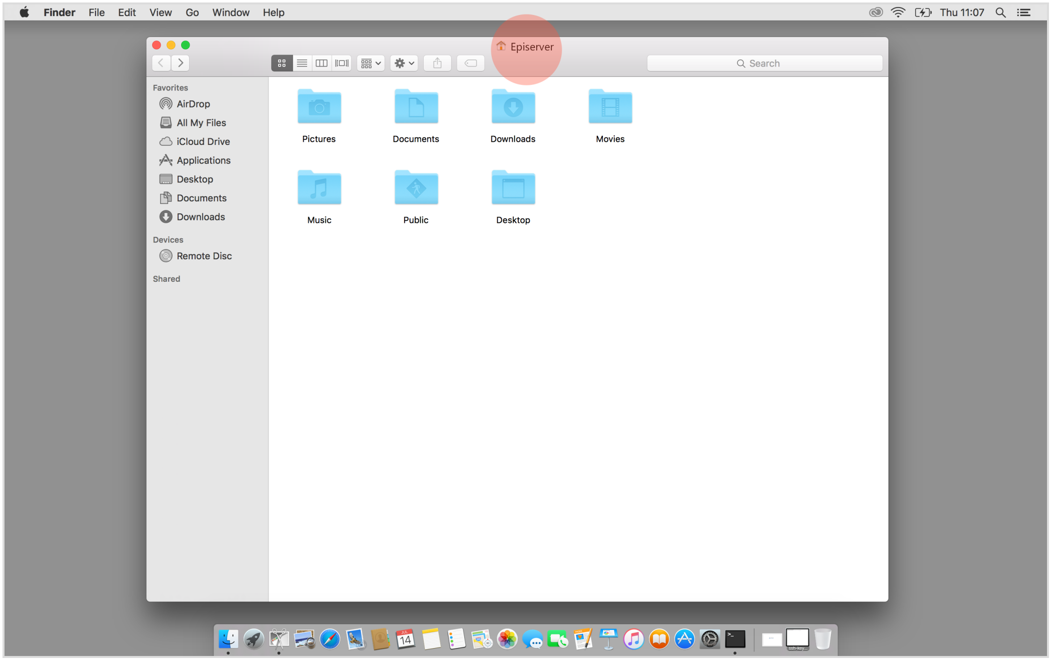
Confirm your entry with the enter key.



By default, the terminal suggests the hidden .ssh folder in your user folder as the storage location and the **id_rsa** file name. If you do not make any individual entries, then the key pair will automatically be saved in the hidden directory using the suggested file name – the private key will be created with the **id_rsa** file name, and the public key will be expanded with the .pub extension. The full file name of the public key would then be **id_rsa.pub**.

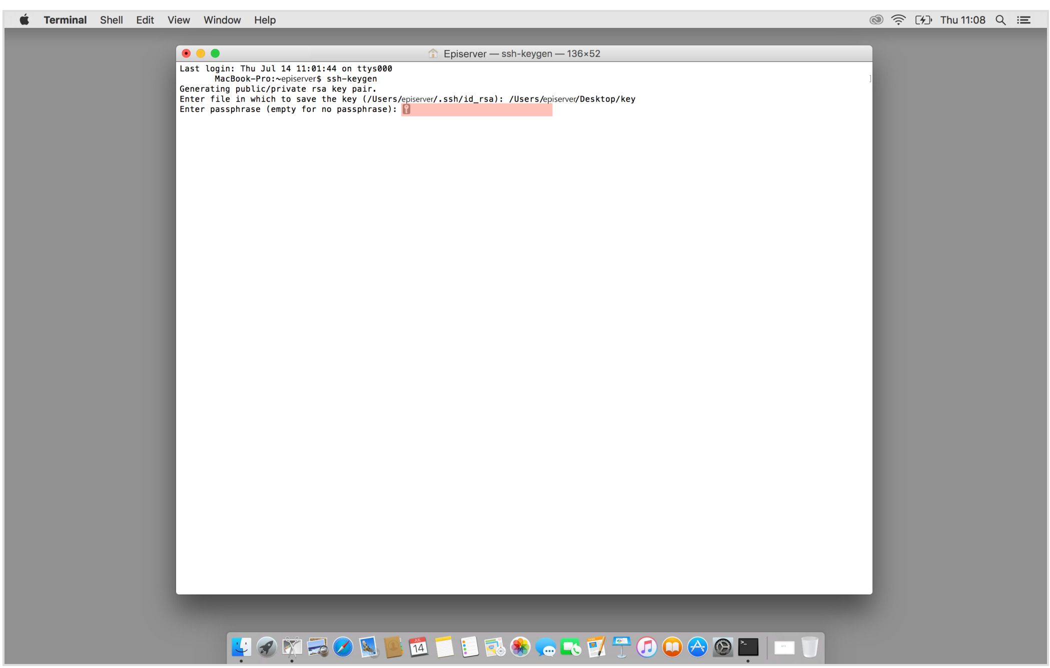
We recommend saving it to your desktop or to a folder that you have specially created for the key pair. This allows you to find the key pair more quickly on your computer when the terminal has created the files.

If you do not know the name of your user folder, you can identify it by e.g. clicking **Go** in the macOS Finder's menu bar and clicking **User folder**. The Finder will then open a new window that will have the name of your user folder on the top bar.



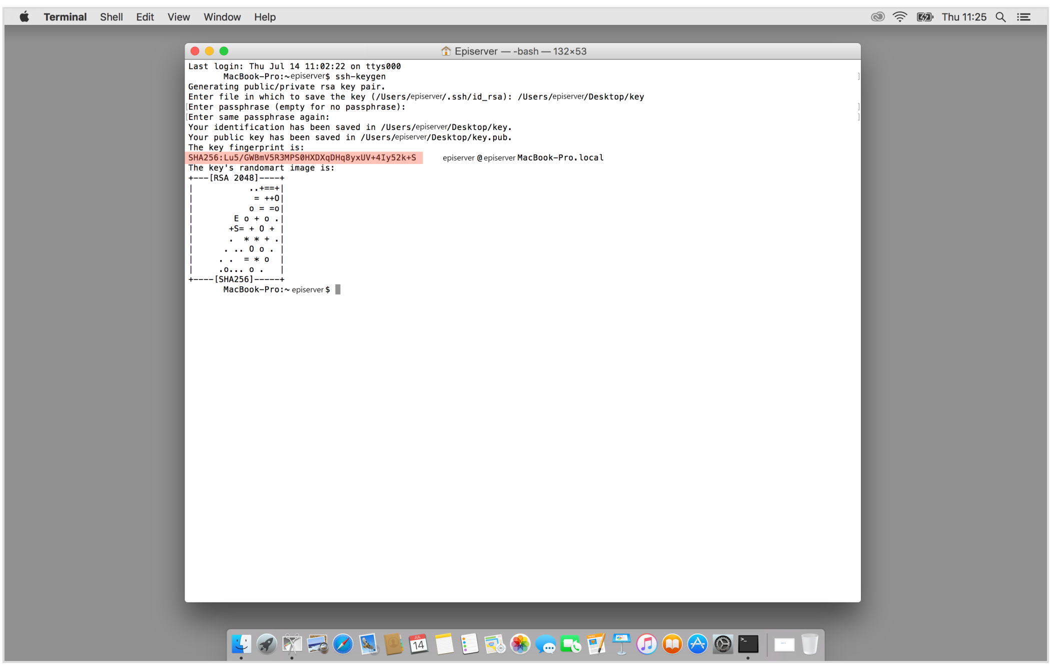
4. When the **Enter passphrase** dialog box appears, enter your password.

> When you enter a password, your entry is not shown in the terminal. This is not an error, but rather normal application behavior.

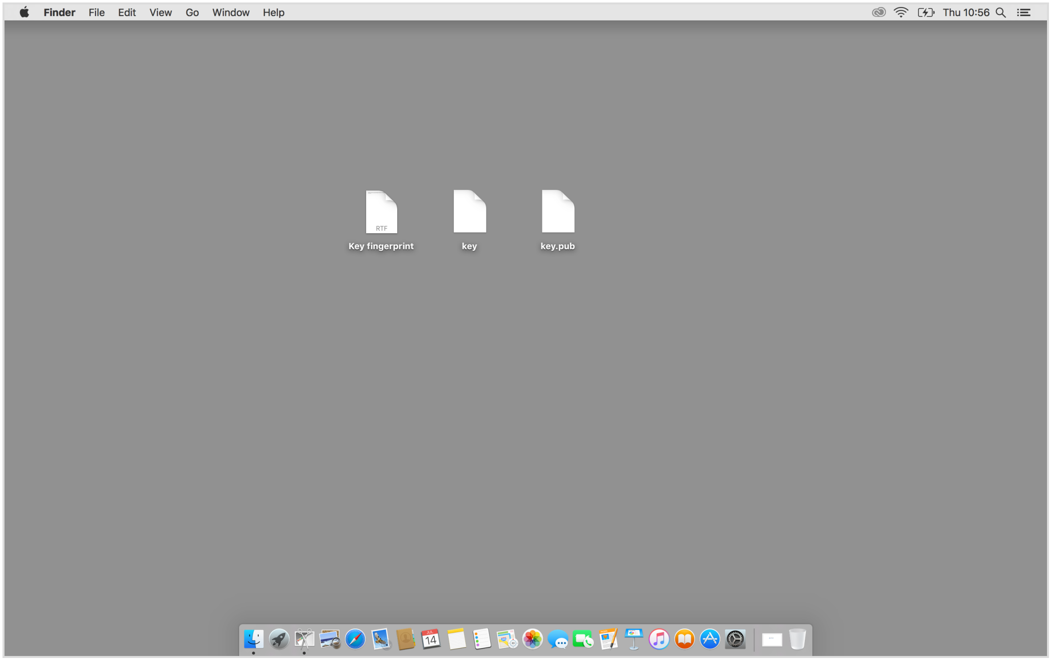


> Remember your password. You will need your password later on if you wish to establish a connection with the server. You will be asked to re-enter the password.

5. Re-enter your password and confirm your entry with the enter key. You have successfully created a key pair in your designated storage location (e.g. on your desktop). The key pair consists of a private key and a public key. You can identify the public key by its .pub extension.
6. After creating the key pair, your key fingerprint will be shown in your terminal window after the text **The key fingerprint is:**. Copy your key fingerprint (the character string that comes after **The key fingerprint is:**) to a text document and save the text document.



You have now created three files: the text document with the key fingerprint, the private key and the public key.



Step 2. Configure user account for SCP access

You need a user account to access the server. Customer support will set one up for you. To have your user account set up for you, perform the following steps:

1. Send your public key (the file with the .pub extension) per email to developersupport@episerver.com.
2. Send your key fingerprint in an additional, separate email: developersupport@episerver.com.

> Always send your public key and your key fingerprint in two separate emails. For security reasons, the two files may never be sent together in one email to customer support. When your user account is configured, you will receive your user account data in an email from customer support.

Step 3. Download and install Cyberduck

When your user account is set up for SCP access to the server, you can connect to the server using the free Cyberduck program. To install the Cyberduck program on your Mac, perform the following steps:

1. Open the link https://cyberduck.io.
2. Download the free Mac version of Cyberduck by clicking on **Download Cyberduck for Mac**. Cyberduck begins to download.

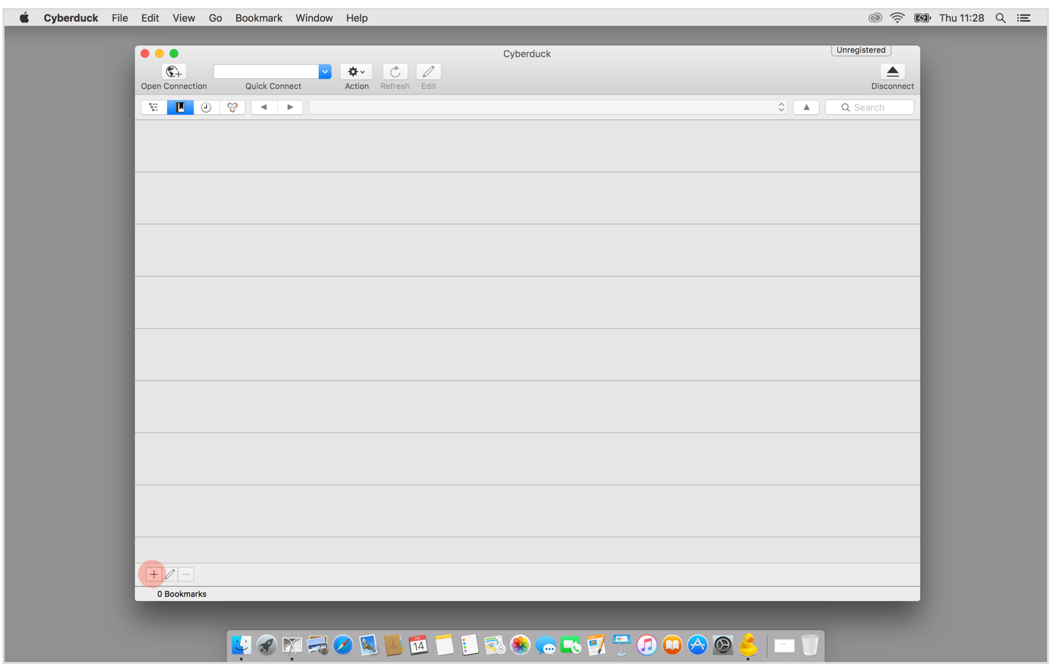
3. When the download has finished, navigate to the download folder in which you have downloaded Cyberduck.
4. If you wish, move Cyberduck from your download folder to the folder where you want to permanently save it, such as **Programs** or **Utility programs**. You have successfully installed Cyberduck.

Cyberduck does not require any additional installation process under macOS. The program is ready to use after downloading.

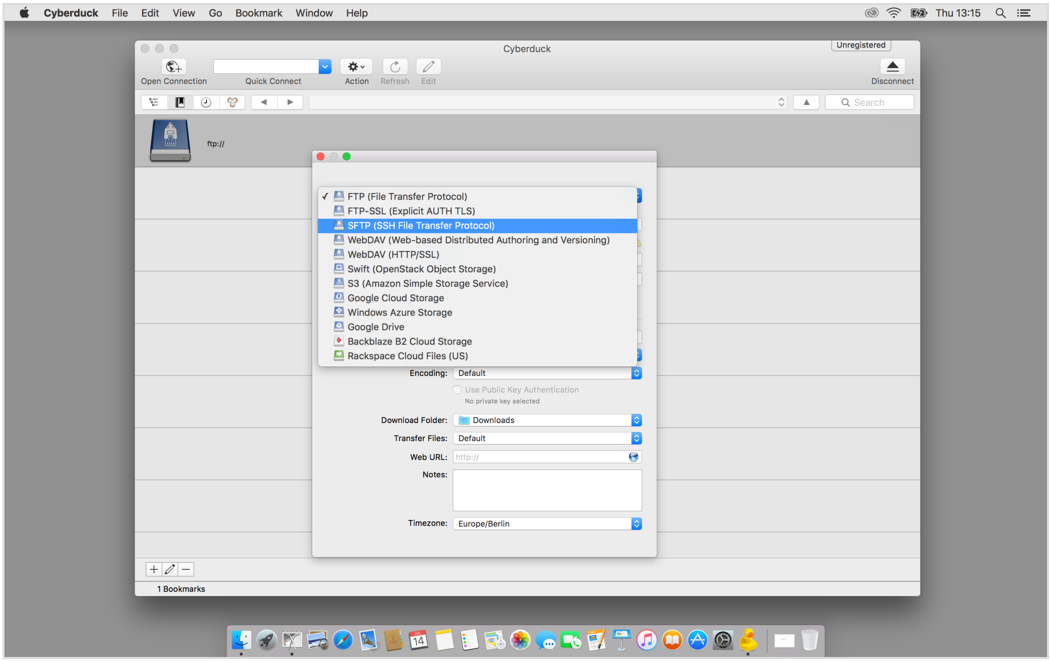
Step 4. Create an SCP connection to the server

To create a secure connection to the server via SCP and securely transfer your data, perform the following steps:

1. Open the Cyberduck program.
2. Click on the plus sign on the bottom left to create a new bookmark for connecting to the server. A new window opens.



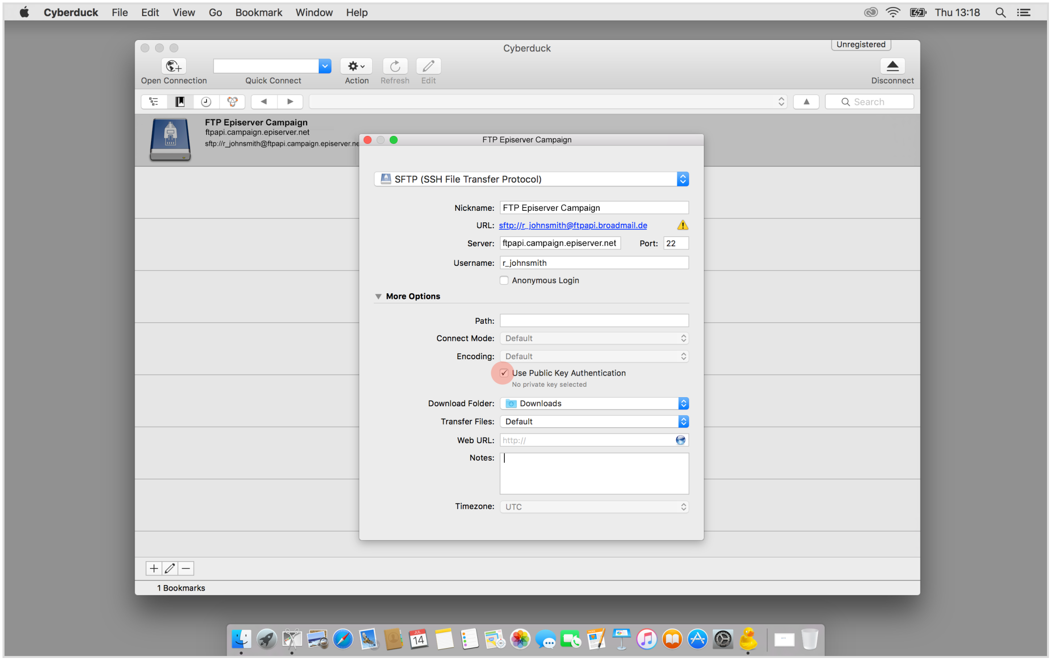
3. Click on the top options menu and choose the **SFTP (SSH connection)** connection type.



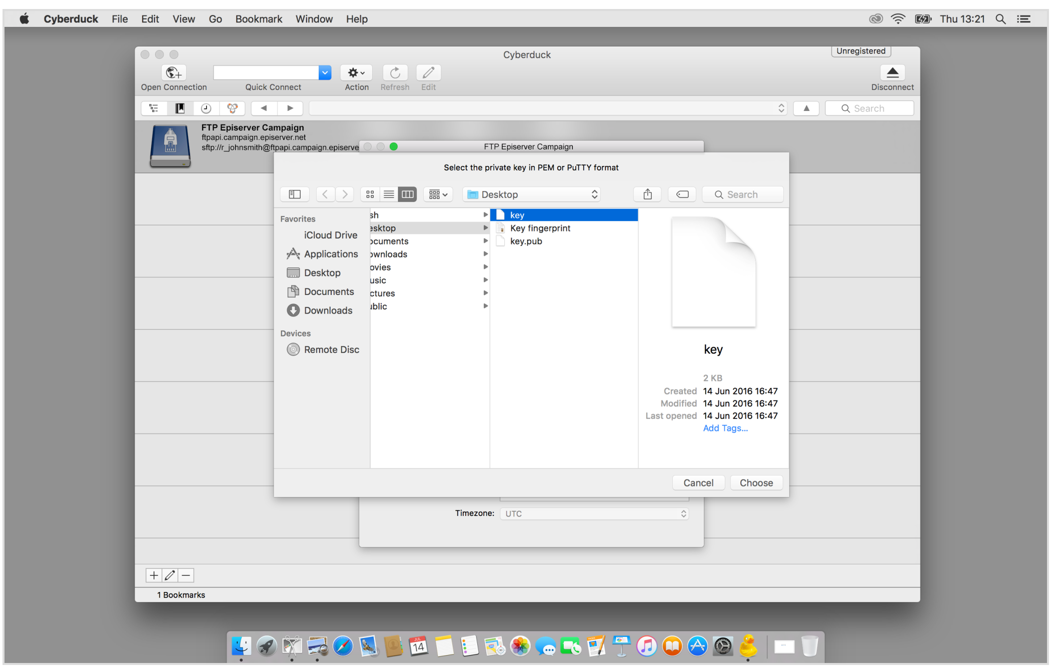
4. In the **Name** box, enter the name under which the bookmark will be saved.
5. In the **Server** box, enter the address `ftpapi.campaign.episerver.net`.
6. In the **User Name** box, enter your user name.

> You will have received your user name from customer support after your user account was configured.

7. Open the **Advanced options** menu by clicking on the arrowhead next to **Advanced options**.
8. Enable the **Use Public Key Authentication** option by placing a checkmark in the check box. A new window opens.

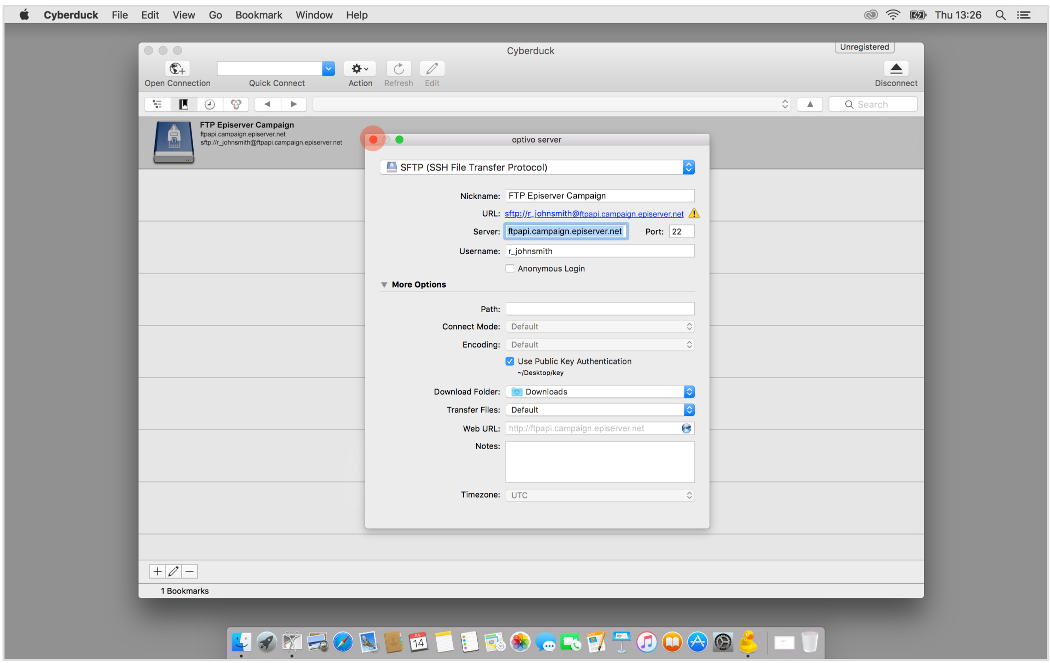


9. In the new window, navigate to the folder where your private key is stored and choose your private key.

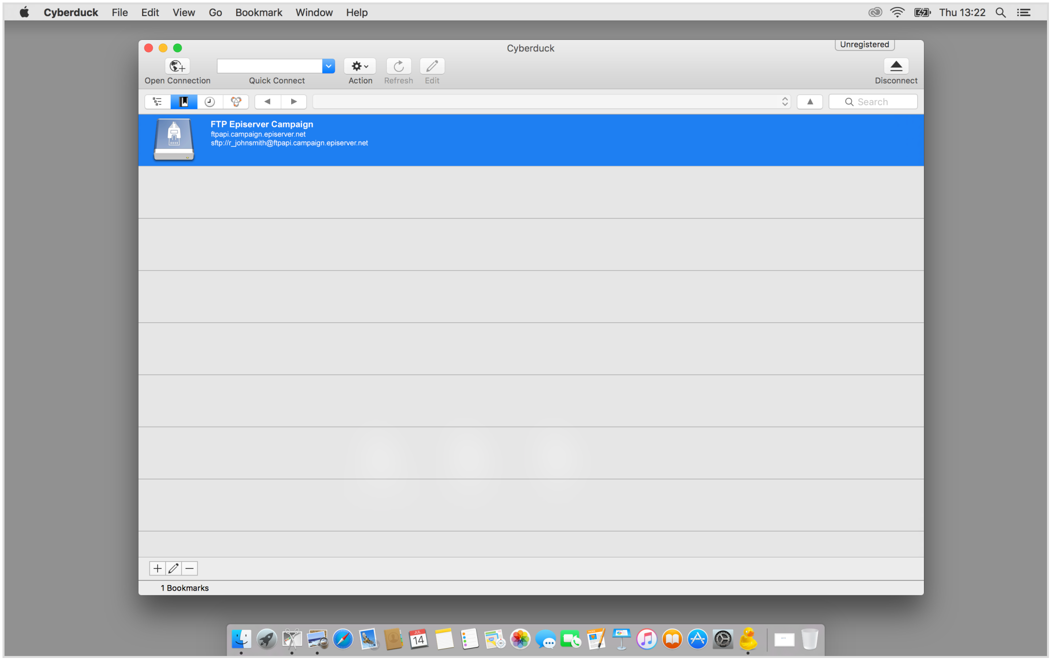


Do not confuse the private key with the public key. For the **Use Public Key Authentication** option, you need to reference your private key.

10. Confirm your selection by clicking on **select** on the bottom-right part of the window.
11. Close the bookmark configuration windows by clicking on the red close button on the top-left. The bookmark configuration window will close. Your settings are automatically saved.



12. To establish a connection to the server, double-click on the saved bookmark for connecting to the server.



13. When you are prompted to enter your password, enter the password that you entered when creating the key pair. You have successfully established an encrypted connection to the server and can now securely exchange files.

FTP access via SCP (Windows)

An encrypted mode is used when moving files from your computer onto the server to protect your data from unauthorized access during transfer. SCP, which stands for Secure Copy Protocol, ensures encryption and proper data transfer. To use this encryption method, you will need an SCP program installed on your computer, access data for the server and a key for server authentication.

This page provides instructions on how to install and set up the program WinSCP, which you can download for free.

Downloading and installing WinSCP

To download WinSCP, perform the following steps:

1. Click the following link: http://winscp.net/eng/download.php.
2. Click **Installation package**.
3. Perform the installation.

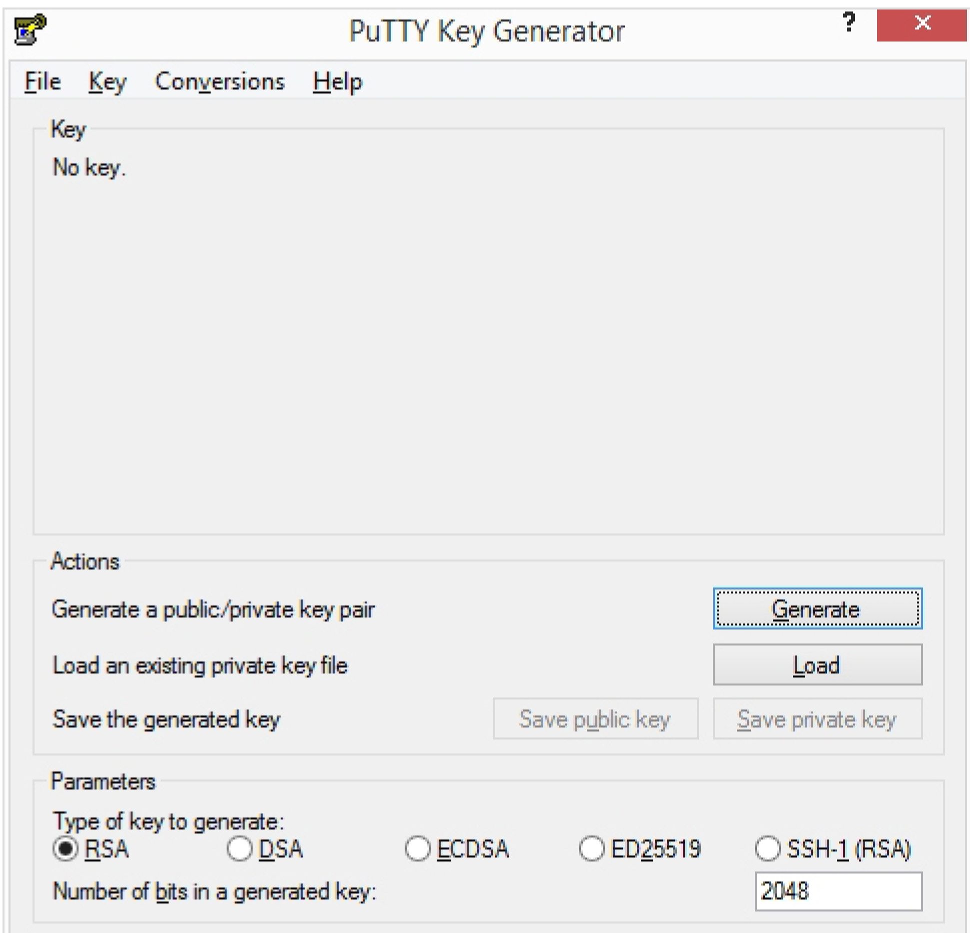
Creating a key pair

To establish a connection to the servers, each user will need a key pair, which consists of a so-called public key and a private key. To create a key pair, perform the following steps:

1. Run the program **PuTTYGen**, which is part of WinSCP.
2. In the **Parameters** area, choose the key type **RSA** and enter the value 2048 in the **Number of bits in a generated key** field.

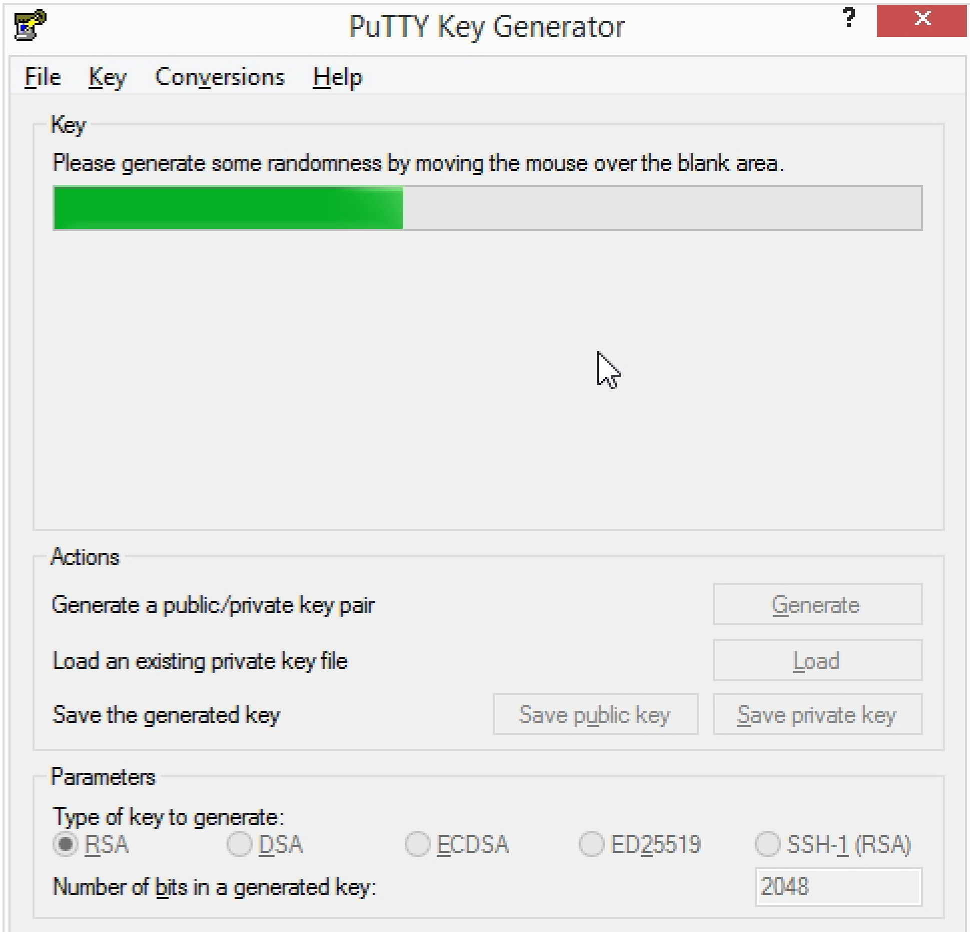
   Make sure to select the correct key type. Episerver only supports the key type RSA.

3. Click **Generate.**

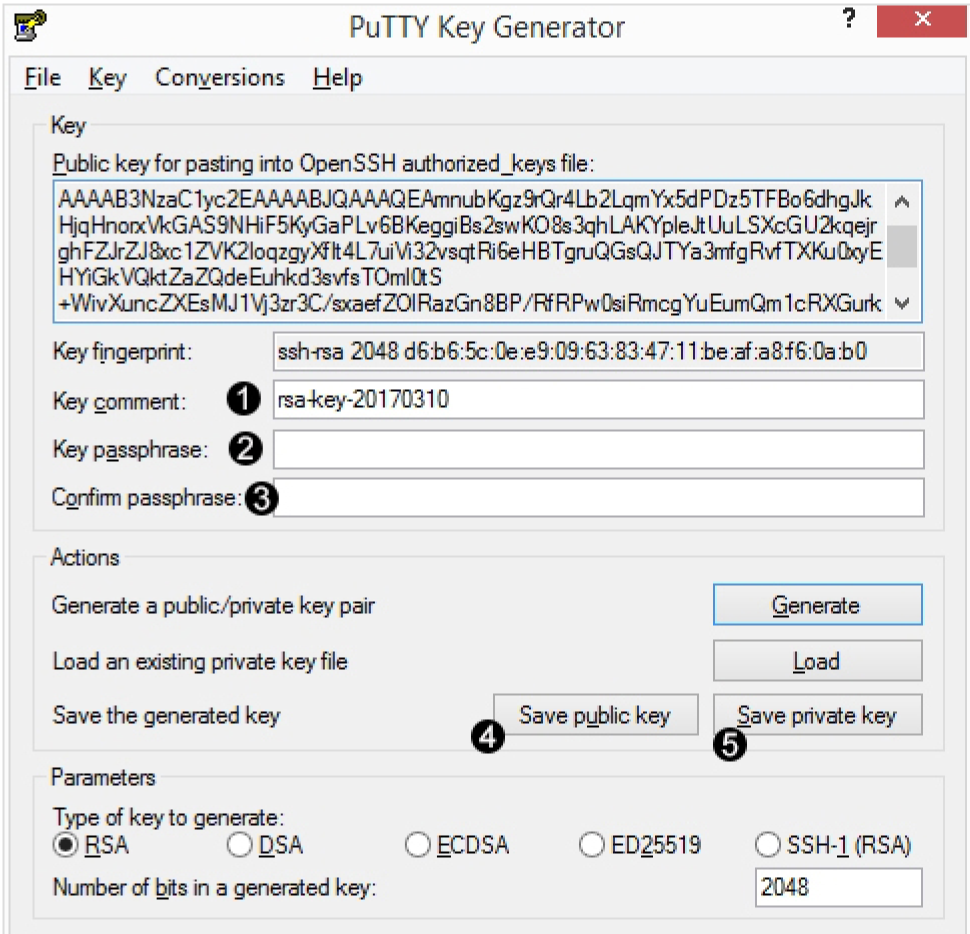


4. While the server is generating the keys, you will be requested to make several random movements with the mouse across a gray field in the window. These arbitrary movements will

generate random values for the keys. The bar near the top of the window indicates the progress of the operation.



5. Once the keys are generated, this window will appear.



6. Fill in the fields as follows:
    a. **Key comment** (1). Enter a brief description, such as "Episerver Campaign-<your_companyname>".
    b. **Key passphrase** (2) . Enter a password for the key.
    c. **Confirm passphrase** (3). Enter the password a second time to confirm.
7. Click **Save public key** (4) to save it.
8. Click **Save private key** (5) to save it.

Secure passwords. Use an eight-digit (or, better yet, a 16-digit) password containing letters, numbers as well as special characters.

Transmitting keys to Episerver

The public key and the key fingerprint must be sent to Episerver separately:

1. Copy the public key and send it by email to developersupport@episerver.com.
2. Copy the key fingerprint and send it in a separate email to developersupport@episerver.com.

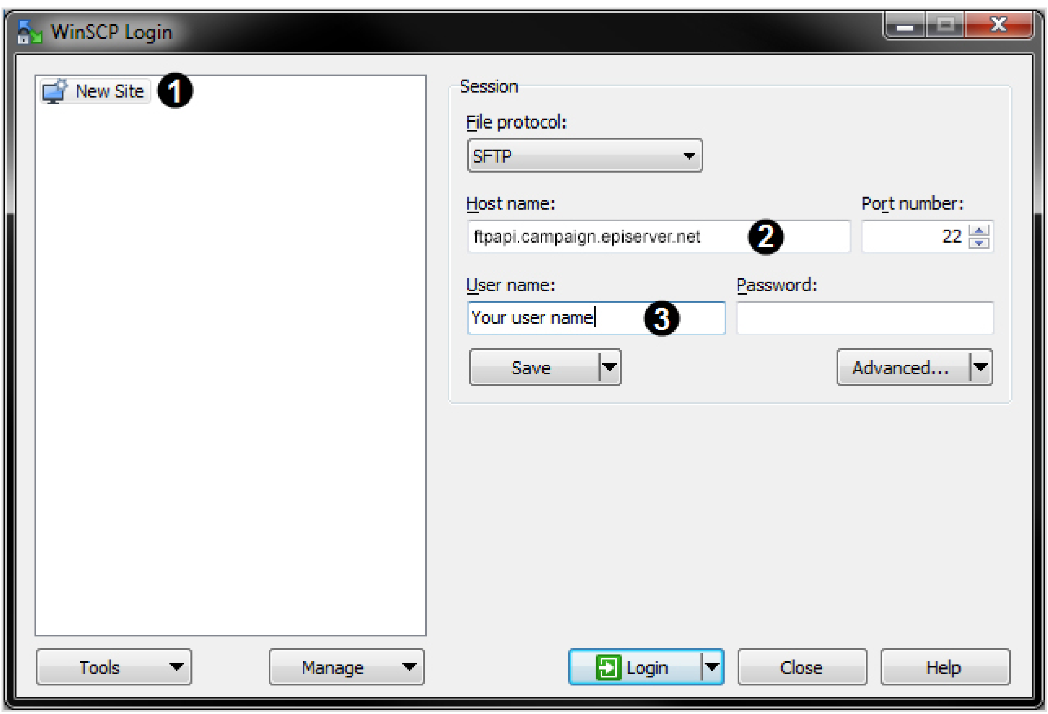
We will then send you a confirmation. Your SCP access is now active.

Protect your keys from unauthorized access. Protect your keys from access by unauthorized persons and keep them in a safe place. If the keys should fall into the wrong hands, immediately notify Episerver and generate a new key pair in the manner previously described.

Establishing a connection through WinSCP

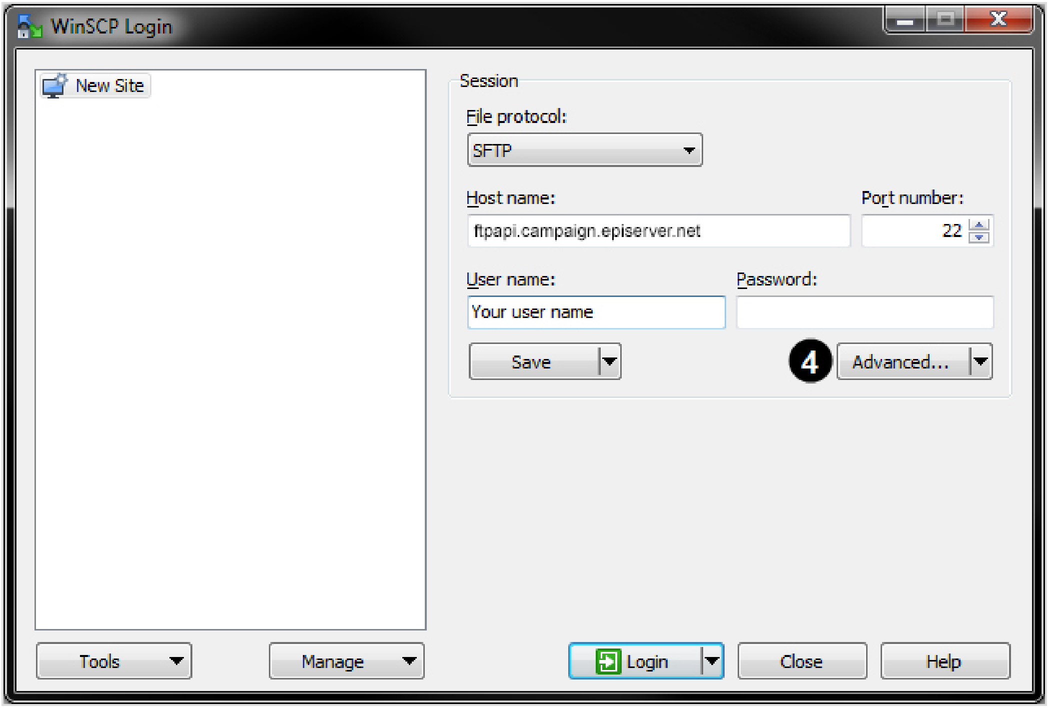
Once your keys have been activated, you can establish a connection to the servers via WinSCP. To do so, perform the following steps:

1. Launch the WinSCP program.
2. In the login window, click **New Site** (1).

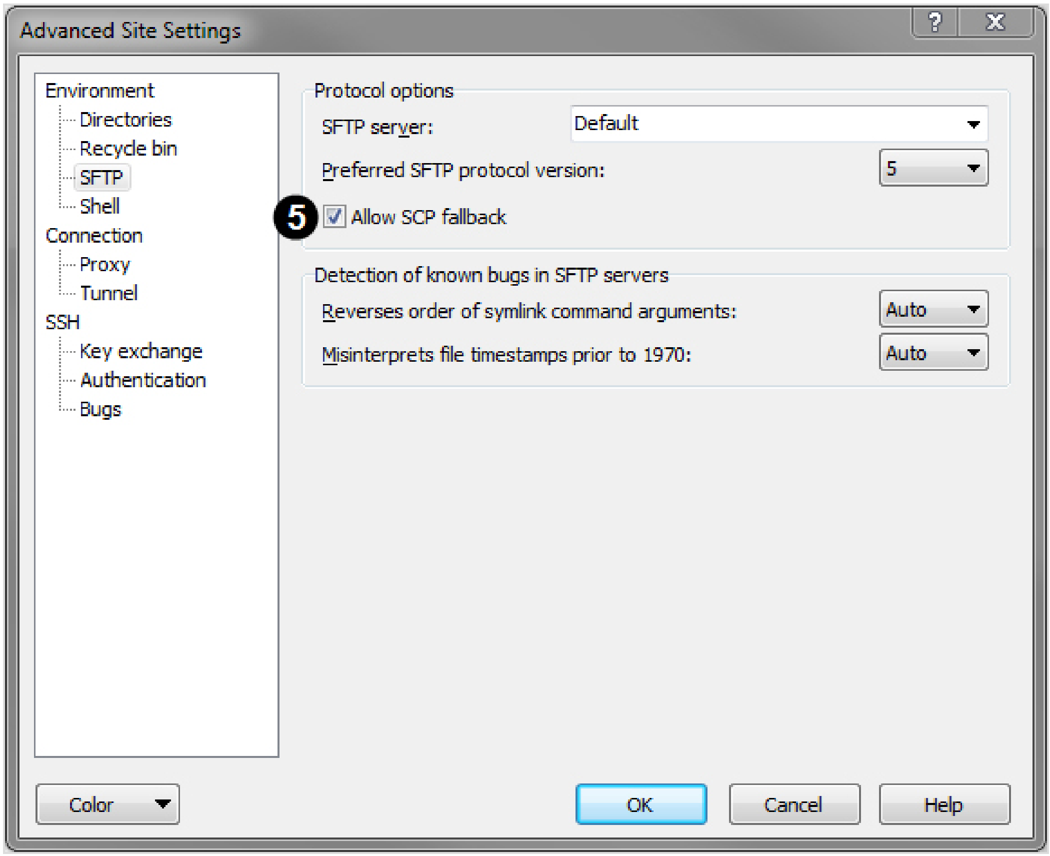


3. Fill in the fields as follows:
   a. **Host name** (2). ftpapi.campaign.episerver.net
   b. **User name** (3). Episerver will provide you with this

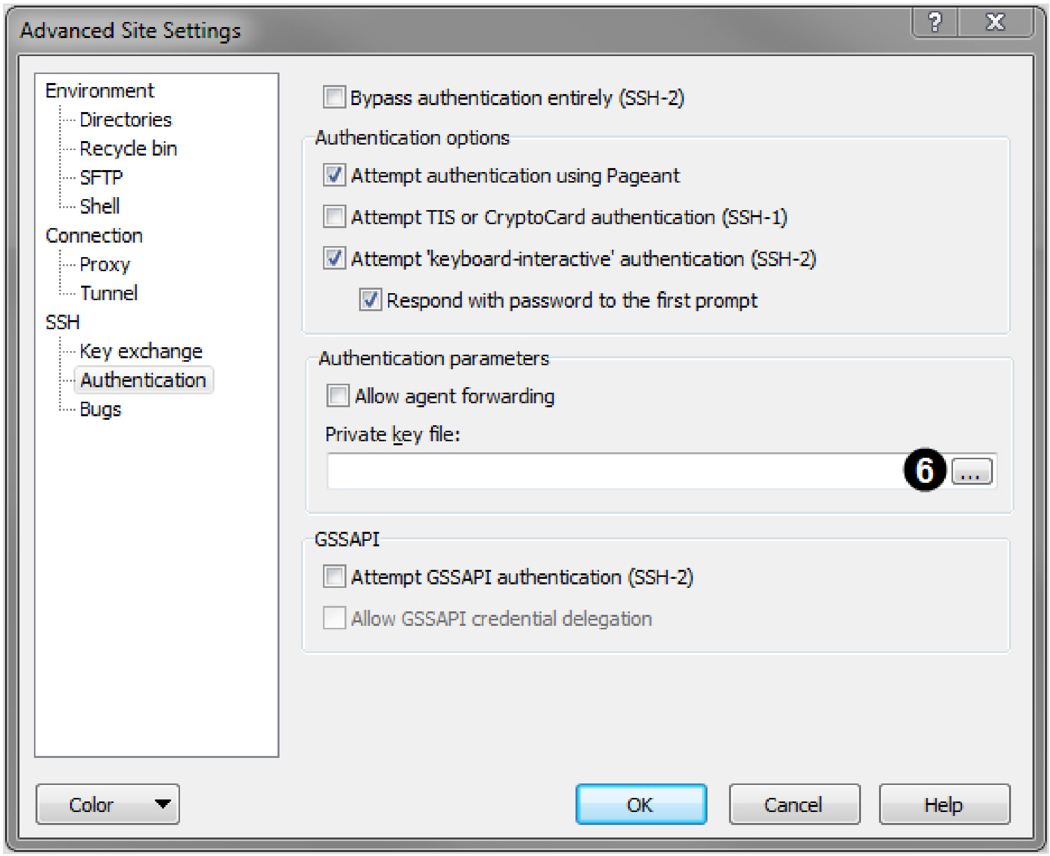
4. Click **Advanced...** (4). The Advanced Site Settings window opens.



5. On the left side under **Environment**, click **SFTP** and on the right side activate the **Allow SCP fallback** check box (5).



6. On the left side under **SSH**, click **Authentication** and on the right side in the **Private key file** field, click **Browse** (...) and select the private key previously generated. (6).

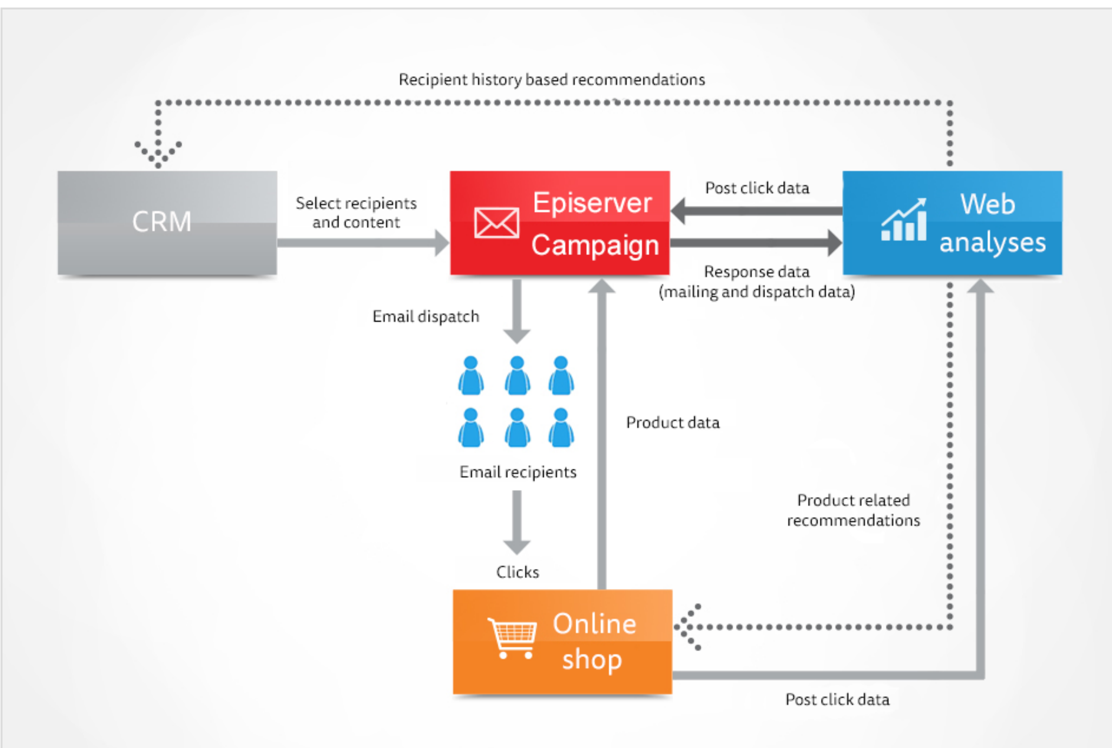


7. Click **OK**.
8. Click **Save**, enter a name for the connection and click **OK**.
9. In the WinSCP login window, select the name and click **Login** to establish a connection.

Web analytics integrations

In email marketing it is common practice to send mailings to a huge number of recipients. Since costs per recipients are low, even a small percentage of conversions signify a reasonable ROI for such campaigns. But nevertheless, customers have become more and more critical and sensible and expect to receive relevant information in their email inbox. This applies for regular newsletters as well as for triggered emails. Here, web analysis comes into play. But not only do your active recipients benefit from the personalized content you send them with web analysis, but also can you improve the purchase process on your website by avoiding unnecessary exit points, re-activate inactive recipients through incentives, and reward premium customers with promotional offers and coupons.

The Episerver Campaign data integration hub offers pre-configured interfaces for most web analyses products which allow an automatic and seamless integration. The functionality and aggregation options of the tracking data vary according to the used web analyses tool. Usually, the data transfer is bi-directional, which means that all data (mailing data, recipient data and tracking data) are available in both tools, Episerver Campaign and the web analyses software. The raw data Episerver Campaign receives from the web analyses software are available in the target group module, Marketing Automation and in the Deep Analytics Module.



To set up and configure the web analyses, log into the client interface of the web analyses software. There, you can configure the integration with Episerver Campaign. Read our documentation for the respective web analytics product to find out, which data you need to do this. Customer support will set up the integration for your Episerver Campaign client.

	Adobe Analytics	Google Analytics
Campaign tracking	Y	Y
Purchased products	Y	N
Viewed products	Y	N
Abandoned shopping carts	Y	N
Revenue	Y	N
Remarketing campaigns[1]	Y	N
Recommendations	N	N
User-defined segments[2]	Y	N

[1] Only with bi-directional integrations

[2] User-defined segments are configured once at the initial setup of the integration. They are submitted with each data transfer to Episerver Campaign.

Which data can be generated with web analytics?

Web analytics software tracks basically any action of a visitor on your website from the entry to the exit point. These actions are then aggregated to get click paths, segments or funnels. Additional actions such as viewed or purchased products, abandoned shopping carts are enhanced with product data (ID, price, category, number of purchased items, etc.). Finally, these data are 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 will be associated with every action the recipient carries out (post click tracking). All following actions until the recipient leaves the website can be associated with his email address.
- **The customer logs in or registers for an online shop with his email address**: The actions on the website are tracked and stored with a temporary ID. If the user uses his email address to log in or register, these actions can be associated with his email address retroactively (user event tracking). If the browser of this user accepts cookies, the actions can be stored and associated even if the user leaves the current session and comes back at a later time.

Triggered campaigns

You can use data from web analyses to trigger automated campaigns. In these campaigns, a mailing is sent to a recipient when he matches a set of criteria:

- **Remarketing**: recipients that have viewed a certain product or has 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 that have ordered a certain product, receive an order confirmation with complementary products.
- **Re-activation**: 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 your regular mailings, to increase relevance for your recipients:

- **Recommendations based on recipient history**: Web analyses software can generate product recommendations that take into account the products a recipient has purchased. Recipients pay more attention to customized, personalized products, i. e. products they are really interested in. Mailings with personalized recommendations have a higher conversion rate than other mailings.
- **Recommendations based on products from the same price segment**: Use web analyses software to analyze, whether a recipient buys rather expensive or rather cheap products. If you send them product recommendations from the same price segment, you will more likely create conversions with your mailings. A customer that has bought only low-priced products in the past, is quite unlikely to buy a high-priced premium product the next time.

Adobe® Analytics integration

Adobe Analytics integration allows you to use campaign and product data from the Adobe® web analytics tool for your email marketing campaigns. Adobe Analytics provides you with data about the activities of visitors to your site. You can use this information to create fine-tuned segments in Episerver Campaign – for example, to specifically address customers who have abandoned their shopping carts – and to efficiently steer your remarketing campaigns.

Adobe Analytics integration allows the bi-directional exchange of mailing and action data. To use the data exchanged through your integration, you first need to implement the Adobe Analytics program on your website. You will then have access to the Adobe Analytics data from within Episerver Campaign. This data is updated daily in Episerver Campaign and is available to you for your regular mailings, transactional emails as well as for Marketing Automation – ideal for your cross-selling, up-selling and remarketing campaigns.

Key mailing data

The output channel from Episerver Campaign to Adobe Analytics is used to send key mailing data (Key Performance Indicators). Data is sent in the background each day.

> Once data has been sent there may be a delay before it appears in Adobe Analytics.

This data is available in Adobe Analytics to analyze your email marketing campaigns:

Classifications (fixed mailing data):

- Mailing ID
- Mailing name
- Mailing description
- Media code[1]
- Date sent

Events:

- Date of creation (date when the action occurred)
- Number of emails sent
- Number of emails delivered (calculated value)
- Openings[2]
- Clicks[2]
- Cancelled subscriptions
- Soft bounces[3]

- Hard bounces[3]
- Total number of bounces (calculated value)

[1] For more information on the media code, see the section email groupings.
[2] Warning: Only absolute values (not unique) are transferred.
[3] For more information on bounce types, see the Episerver User Guide.

Recipient segments

Using the feedback channel, you can create segments from Adobe Analytics based upon the activities of your site visitors and send these to Episerver Campaign. A segment comprises all events that match defined criteria, e.g. a product purchase.

The following segments are defined by the Adobe integration and are sent to Episerver Campaign each day by default.

- **Product purchase** (Product Purchases (broadmail[4])): This segment includes all site visitors for whom a recipient ID is available and an event of type **Order** was recorded.
- **Product view** (Product Views (broadmail4)): This segment includes all site visitors for whom a recipient ID is available and an event of type **Product View** was recorded.
- **Abandoned shopping cart** (Product Abandonment (broadmail4)): This segment includes all site visitors for whom a recipient ID is available and an event of type **Cart Addition** was recorded but without a corresponding **Order** event.
- **PostClicks**: This generic non-configurable segment contains all visitors to your website for whom a recipient ID, a mailing ID, a Mailing-to-user ID, a date and a media code was recorded. 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 section Exporting segments and using them in Episerver Campaign.

[4] The solution is provided by optivo broadmail. optivo is an Episerver company.

Configuration

Setup of Adobe Analytics integration by Adobe

The initial steps to set up the integration must be carried out in Adobe Analytics by Adobe. For bi-directional data exchange you will also need an Adobe Analytics user account with admin rights.

To set up the integration in Adobe Analytics and to get an Adobe Analytics user account with admin rights, contact Adobe customer support.

> Additional charges apply for the setup by Adobe that are not included in the setup costs charged by Episerver for setting up the integration. Further information can be found on Adobe's website.

Data Connector part 1

Once Adobe has set up the integration in Adobe Analytics you must link the Data Connector in Adobe Analytics with Episerver Campaign and activate the Episerver Campaign integration. To do this, perform the following steps:

1. Log into Adobe Analytics with your user name.
2. In the menu bar, hover your mouse pointer over the **Admin** option. A drop-down list appears.
3. Click **Data Connectors**. A new window opens.
4. Hover your mouse pointer over **optivo broadmail**[4]. The Context menu appears.
5. Click **Add new**. A pop-up window opens displaying the terms and conditions. After you accept the terms and conditions the pop-up window expands.
6. Use the list in the pop-up window to select the report suite you wish to use with your Episerver Campaign integration.
7. In the field below, enter a name to use for the Episerver Campaign integration Data Connector.
8. Confirm your input by clicking **Create and Configure This Integration**. You have now successfully linked the Data Connector with Episerver Campaign and activated the Episerver Campaign integration. The Configure tab opens.

[4] The solution is provided by optivo broadmail. optivo is an Episerver company.

Data Connector part 2

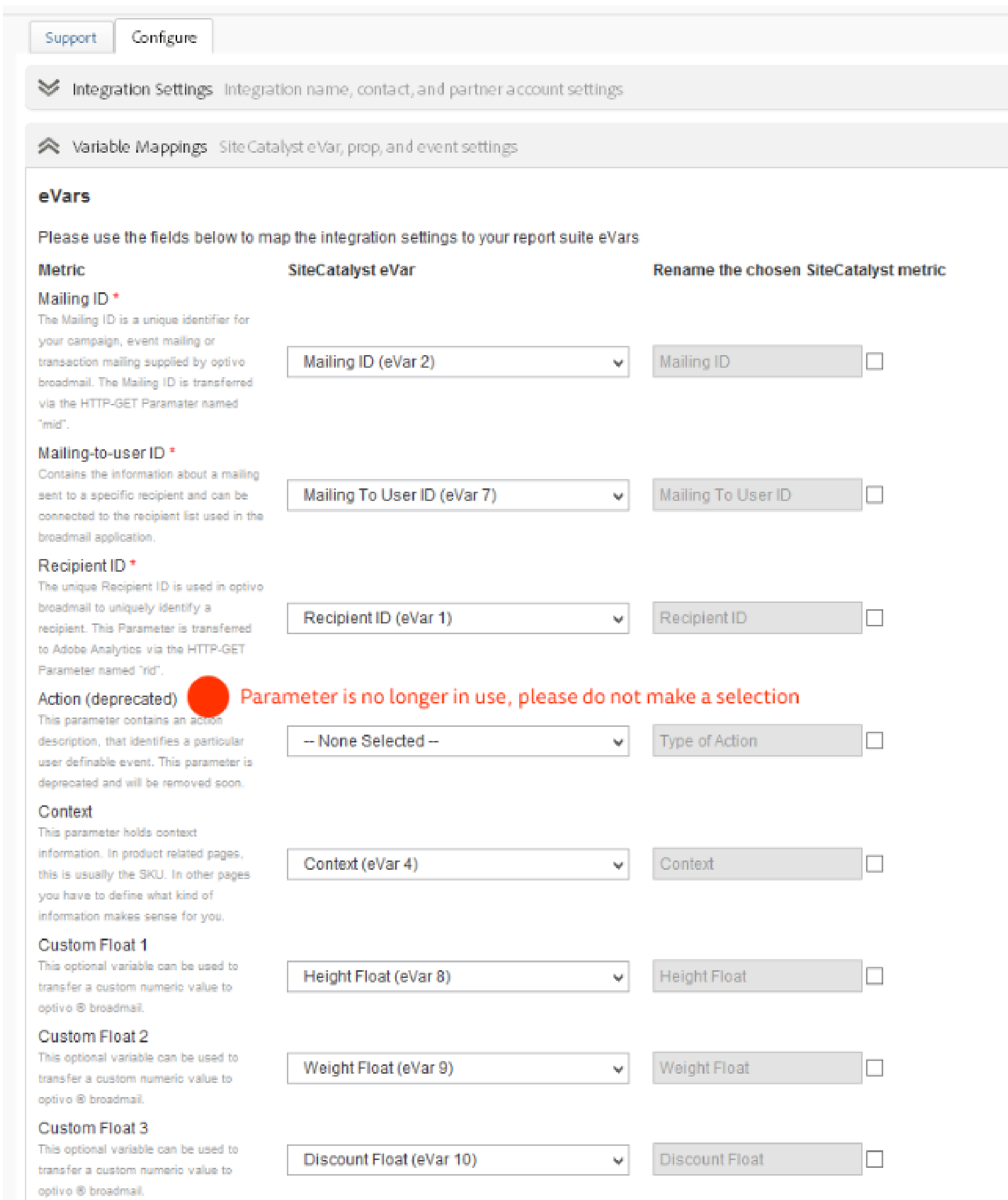
In the Configure tab you must now configure the Data Connector for the Episerver Campaign integration. The Episerver Campaign integration specifies a range of variables that can be assigned to Episerver Campaign. Custom fields are also available alongside these which are also assigned to Episerver Campaign. Both types of variables can be allocated to the conversion variables (eVar) and success events (Event) you have defined in Adobe Analytics. This allows you to send the statistics you want to Episerver Campaign.

To configure the Data Connector and allocate the Episerver Campaign variables to the conversion variables (eVar) and success events (Event), perform the following steps:

1. In the drop-down lists under **SiteCatalyst eVar** and **SiteCatalyst Event**, select the conversion variables and success events from Adobe Analytics that you would like to allocate to the Episerver Campaign integration variables.

Episerver Campaign integration variables that appear in the Configure tab under **Metrics** and which are marked with a red star (*) must be allocated to a conversion variable or success event from Adobe Analytics. Ensure that you have made a selection for each of the Episerver Campaign integration variables that are indicated with a red star (*).

2. If needed, activate the check box under **Rename the chosen SiteCatalyst** metric and enter a new name.



Implementation on your website

To implement the analytics program on your website, perform the following steps in Adobe Analytics:

1. Select your preferred reporting suite in Adobe Analytics.
2. Define here the success events and conversion variables.
3. Embed the script generated by Adobe into each page on your website. In the JavaScript code, assign all relevant variables that apply for each context. In practice, dynamic values are assigned depending which e-commerce system or website administration software you are using:

   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 */
   ```

Once you have successfully embedded this into your site, data about your visitors' actions will be sent to Adobe. This data will in turn be sent to Episerver Campaign using the pre-defined and custom segments you have created and can then be used to create target groups.

Setup in Episerver Campaign

In this last step, the integration must be set up in Episerver Campaign.

To set up the integration within Episerver Campaign, contact customer support who will do this for you. The integration setup in Episerver Campaign is only possible after Adobe has set up the integration for your Adobe Analytics user account.

Exporting segments and using them in Episerver Campaign

Configuration of the export

> New segments created in Adobe Analytics must be activated to be sent to Episerver Campaign. This does not happen automatically. The following instructions describe the individual steps necessary to do this.
> **Requirements**: You have already created recipient segments in Adobe Analytics. To create segments, consult the Adobe Analytics documentation.

To export existing segments to Episerver Campaign, perform the following steps:

1. Log into Adobe Analytics with your user name.
2. In the menu bar, hover your mouse pointer over the **Admin** option. A drop-down list appears.

3. Click **Data Connectors**. A new window opens.
4. Hover your mouse pointer over **Episerver Campaign**. A context menu appears.
5. In the context menu, click the integration that was created during installation of the Data Connector. The integration window opens.
6. In this window, click the Configure tab.
7. In the lower part of the window, click the Data Settings tab. An overview showing all available segments opens.
8. Select the segments that you would like to export to Episerver Campaign by selecting the check box next to the relevant segments.
9. Confirm your selection by clicking **Save** at the bottom of the window.

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 pre-defined in the Data Connector for Episerver Campaign. If needed, you can prevent the **Product Abandonment (broadmail**), **Product Views (broadmail)** and **Product Purchases (broadmail)** segments from being sent by unticking the check box next to the relevant segment.

Standard parameters and standard variables

Standard variables

The Adobe Analytics integration sends a range of standard variables to Episerver Campaign. This includes data from Product Variable, for example. The Product Variable can contain up to four values:

- Item number or context
- Order
- Quantity
- Price

More information about the standard variables can be found in the Adobe Analytics Implementation Guide.

Optional: Alongside the standard variables there are 8 custom variables (fields) that you can use:

- Custom Float 1-4
- Custom Text 1-4

> If you wish to use these custom fields, additional configuration is required in your client. Contact customer support who will do this for you.

To assign these custom variables (fields) in Adobe Analytics after your recipient lists have been adapted, consult section 2c) Data Connector Part 2.

To create target groups in Episerver Campaign using the data sent from the custom variables, consult section Creating target groups in Episerver Campaign.

In Episerver Campaign you have access to the exact values that you have defined in Adobe Analytics. This means that for each segment you can access the data set by you.

The security of personal data is guaranteed for both the output and return channels. All links contained in a mailing are expanded with anonymized recipient and campaign data. Anonymization of data prevents parameters from being associated with a recipient either directly or fraudulently used via third parties. The return channel re-associates the anonymized data about website visitors with the mailing recipients and campaigns.

Standard parameters available in segments

- To create target groups in Episerver Campaign (cf. section Creating target groups in Episerver Campaign) you can use the following standard parameters for each segment:
  - **Mailing ID**:[5] ID of the mailing from which the action originated
  - **Recipient ID**:[5] ID of the recipient who started the action
  - **Mailing to user ID**:[5] Unique ID that associates a recipient with a mailing
  - **Date**:[8] Field for a date and time zone in international format
  - **Context**:6 Field for important information about the relevant usage context, e.g. item number
  - **Action** [7]

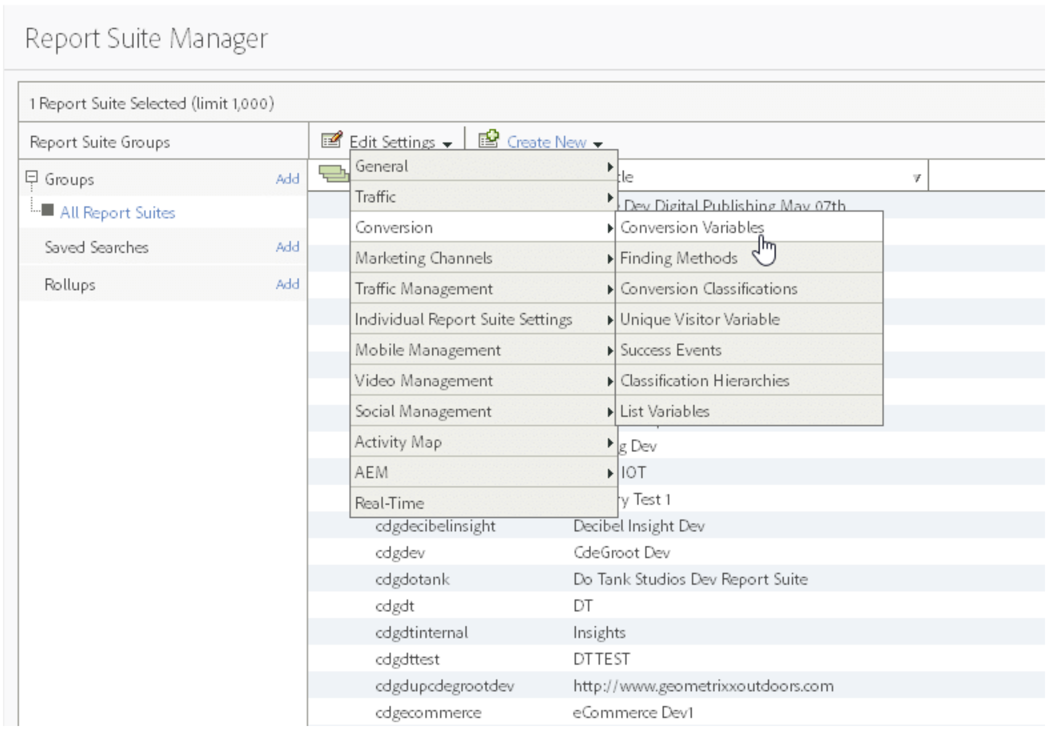
[5] These parameters are required and may not be modified.
[6] These parameters can be freely assigned.
[7]This parameter is no longer used. Do not associate it with a variable in Adobe Analytics.
[8] Use a valid date format. Examples of valid formats:

- `EEE MMM dd YYYY HH:mm:ss 'GMT'Z // Javascript Date.toString()`
- `EEE, dd MMM yyyy HH:mm:ss 'GMT' // Javascript Date.toGMTString()`

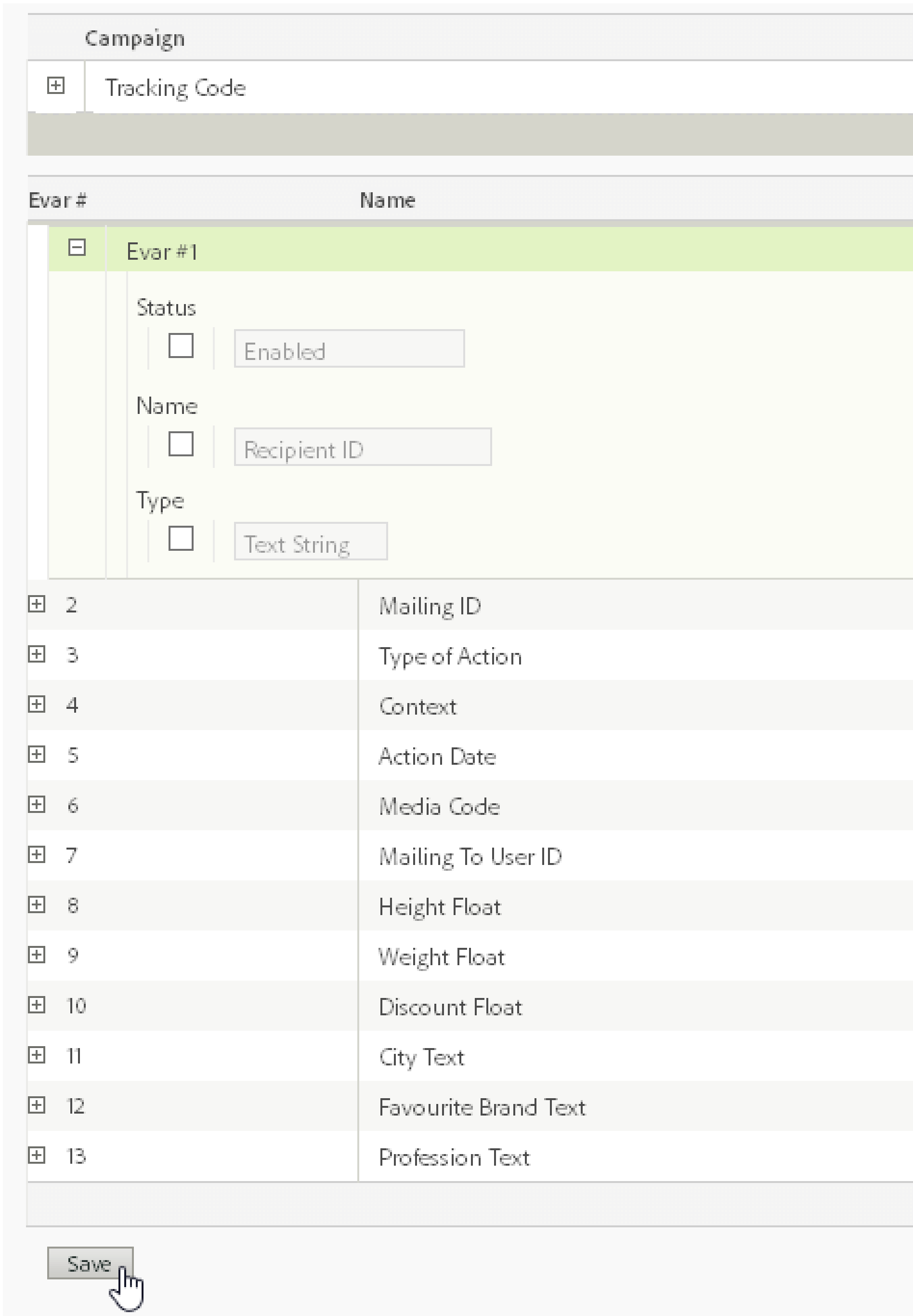
Configuration of additional conversion variables and success events in Adobe Analytics

You can define all conversion variables (eVar) and success events (Events) in Adobe Analytics. To do this, perform the following steps:

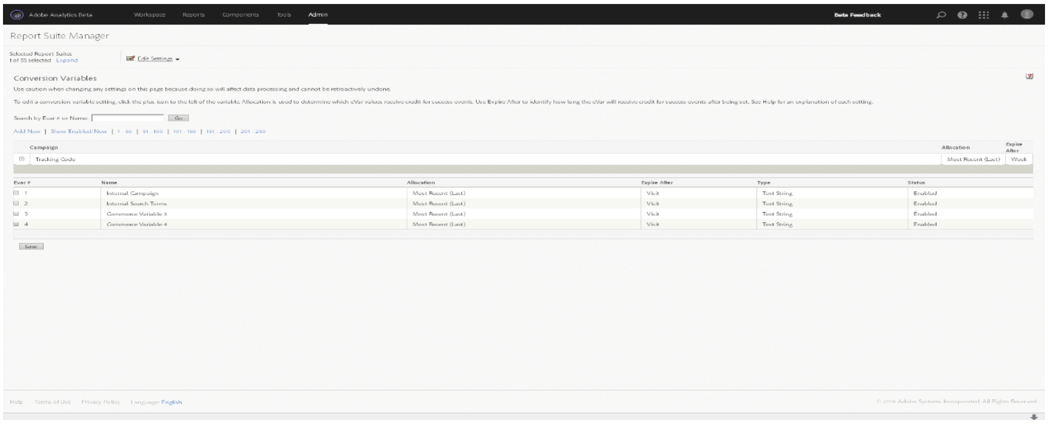
1. Log into Adobe Analytics with your user name.
2. In the menu bar, hover your mouse pointer over **Admin** and click **Report Suites**.
3. Select the menu item **Edit settings > Conversion > Conversion Variables**.



4. Configure the conversion variables (**eVar**) and then click **Save**. You are then given the name and number of the eVar.



5. Note down the name and number of the conversion variables so that you can map these with the Episerver Campaign integration variables later on.



To define the success events, proceed exactly as described above, but instead of **Conversion variables**, select **Success Events**.

Example: Name and number of the conversion variables

Adobe Analytics gives you access to the following events and conversion variables:

All Episerver Campaign integration variables indicated with a red star (*) must be assigned to a conversion variable or event in Adobe Analytics.

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.
eVar	Recipient ID*	Recorded using email link	The ID of the recipient: Using this ID,

Type	Name	Data collection	Description
		parameters and automatic collection methods or using a JavaScript plug-in.	actions such as product purchases, abandoned carts, etc. 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 will be sent to Episerver Campaign. This will mostly be an item number.

Type	Name	Data collection	Description
eVar	Type of Action	*deprecated (no longer used*)	

Further information about conversion variables (eVar) and success events (Events) is available from the Adobe Analytics help pages.

Creating target groups in Episerver Campaign

To use the transferred web analytics data for your campaign mailings, you must first create target groups. To do this, perform the following steps:

1. Open the Episerver Campaign start menu and in the **Recipients** menu click **Target groups**.
2. Click **Create**.
3. In the Target group definition area, click **+**.
4. In the second drop-down list, select the option **Action** and in the third list, select the option **has created one or more post clicks**.
5. If you are using multiple post click services, in the **Service** drop-down list select the option **web analytics**.
6. In the **Mailing** drop-down list, select the mailings to which the data is related. If you make no selection here, all mailings will be analyzed.
7. In the drop-down list **Period**, specify whether you want post clicks to be limited to a period or a point of time. Time periods indicated in days (e.g. older than 30 days) relate to the current day.
8. In the selection list **Category**, select one of the pre-defined categories and then an operator (e.g. equals). Then enter a comparison value. For example, to select everyone who purchased a product, click **Action** (or **Purchase**, **Product view**, **Abandonment**) and enter purchase in the field to the right. Ensure you have the correct spelling for this entry so that it is identical to the name used by Adobe.
9. Click the tick button. This target group rule will select all recipients who have purchased any type of product. To further refine the target group and to only select recipients who purchased a specific product, add an additional rule:
10. In the Target group definition area click **+**.
11. Now select the **Product name** category and enter a product name in the field. This field uses the auto complete feature. As you start typing, all matching products will be displayed in a list. You must ensure that this entry is also identical with the entry stored in the database to find any matches. You should therefore always use the auto complete feature if you are not sure.
12. Add additional rules to this target group. You can also combine the Adobe Analytics web analytics data with other recipient and campaign data. We recommend testing the created target group before first use. In the Analysis area, select a recipient list and click Calculate.
13. Click the tick button.

14. When you are satisfied with the results, switch to the tab Properties and enter a name for the target group. Optionally, you can also enter a description.
15. Click **Create**.

Processing of analytical data

Evaluating the email channel in Adobe Analytics

All data sent from Episerver Campaign can be evaluated in Adobe Analytics. All emails sent via Episerver Campaign contain three additional HTTP parameters: **mid**, **rid** and **m2u**.

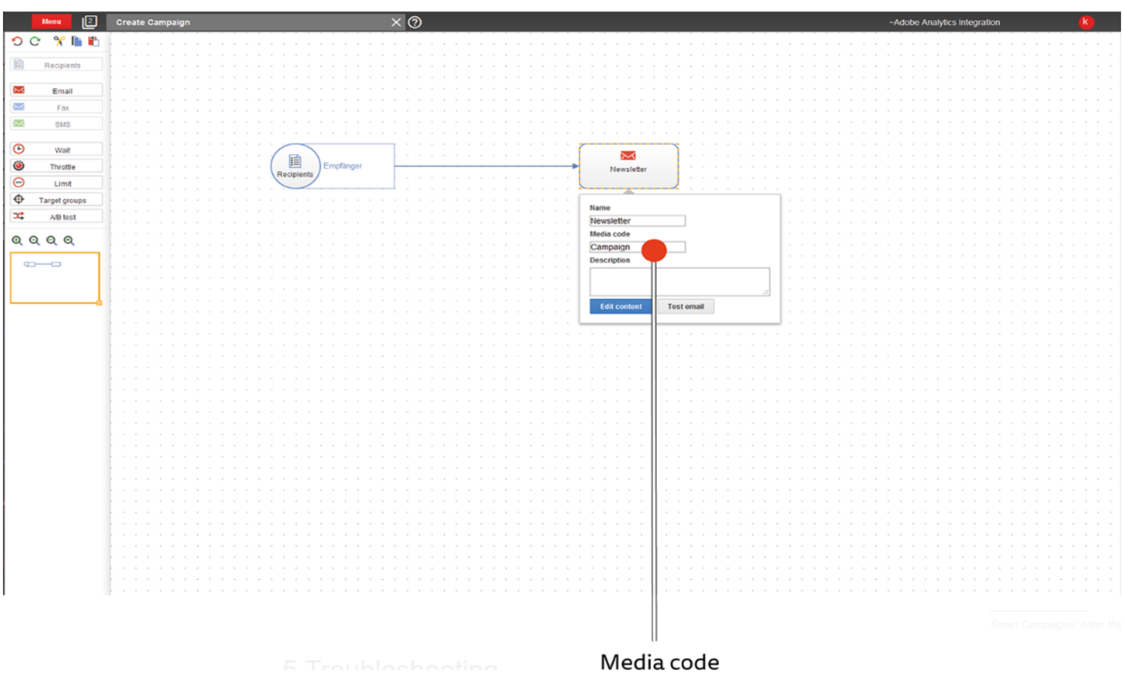
You can use these parameter names in the Marketing Channel Processing Rules. First ensure that no other parameters with these names are being sent via other channels.

Further information about automatic assignment of interactions to marketing channels in Adobe Analytics can be found on the Marketing channel documentation site.

Grouping your mailings in Episerver Campaign

When creating a mailing, you can optionally specify a media code in the Web analysis tab. This parameter serves to later group multiple mailings in Adobe Analytics. For example, if you assign all mailings within a multi-stage campaign to the same Media Code, you will later be able to evaluate these mailings together. No further configuration is necessary.

Smart Campaigns: enter the media code



Troubleshooting Adobe Analytics integration

The following table lists the most common sources of errors that can arise while working with the Adobe Analytics integration.

If you encounter a problem, check this table to see if the solution provided resolves your issue.

> If the problem continues after you have attempted the suggested solution, contact 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 in order for them to be sent, see section 3 Exporting segments and using them in Episerver Campaign.
Data transfer fails or you are unable to set up the data transfer.	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.
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 all required variables, see section 2c) Data Connector Part 2.
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 have been implemented incorrectly, on some pages of your website.	Implement and/or correct the variables on each page of your website.

Google Analytics integration

The unidirectional interface between Google Analytics and Episerver Campaign allows for the allocation of email recipients and website visitors. The seamless integration allows you to use the results of email marketing campaigns in Google Analytics.

The Google Analytics link can be used to measure the success of email campaigns, capitalizing on the following advantages:

- A central platform for the evaluation of online campaigns is used to evaluate all email campaigns.
- In addition to the click rates recorded by Episerver Campaign the financial success of campaigns can be identified as both the costs for advertising campaigns and the revenues generated by the campaigns can be incorporated and presented.

Setup

You need a Google Analytics user account to use the Google Analytics interface. The setup in your Episerver Campaign client is taken care of by our customer support representatives. You do not need to make any adjustments to the settings when you want to send out mailings. Every mailing's data is automatically transferred to Google Analytics.

Data transfer

The integration uses an automatic, generic link extension which adds parameters used by Google Analytics for the allocation of campaigns to all links used in the mailing. Google Analytics uses cookies. This means that return users can be identified. Recipients who initially accessed the website via an email campaign are identified as email campaign visitors even upon returning via a direct access of the website.

Using the link extension, global shipping data is transferred to your Google Analytics account after dispatch of a mailing. You can also view this data in your Google Analytics account. You can influence the aggregation of analysis data yourself in your Google Analytics account.

Google Analytics uses the following 5 standard parameters for link extension and data transfer:

- utm_source
- utm_medium
- utm_campaign
- utm_term
- utm_content

Use these standard parameters to automatically transfer data, such as the following:

- Date of creation
- Mailing ID

- Mailing name
- Mailing description
- Mailing type
- Recipient list fields

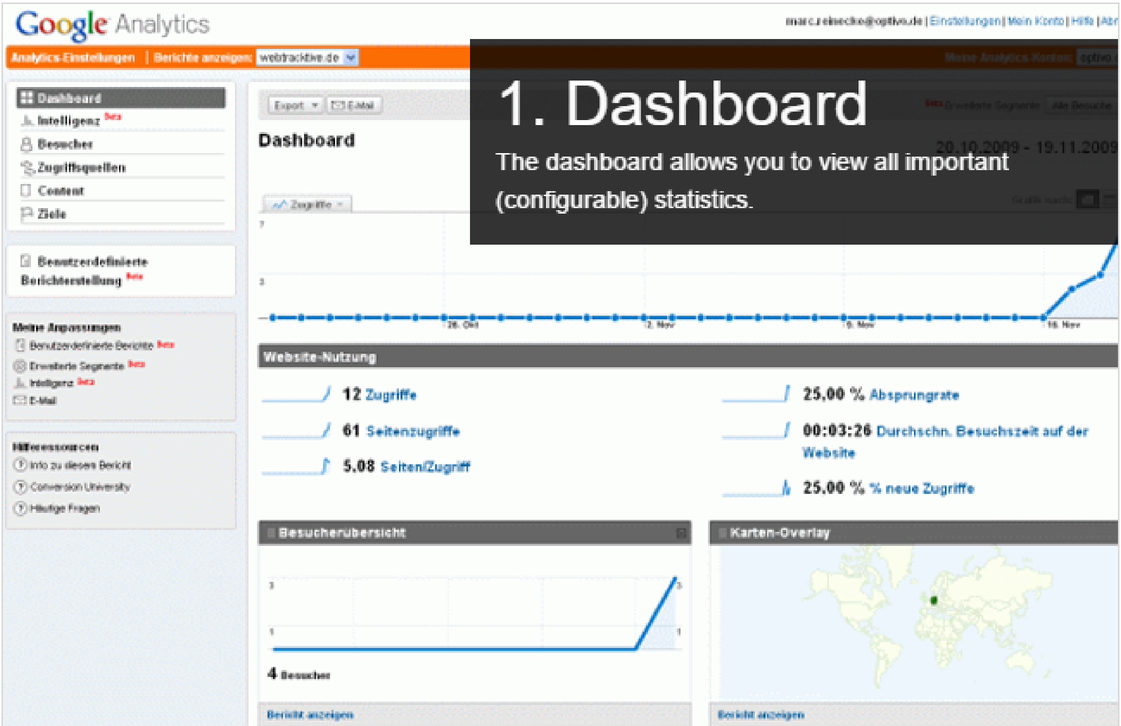
Examples: You would like to transfer the mailing type **Newsletter** to Google Analytics. To do this, use the standard parameter **utm_source**. To transfer the mailing type you can use the standard parameter **utm_medium**, and for the mailing name, the standard parameter **utm_campaign**. You can also combine two data sets and transfer them together using one standard parameter. For example, the mailing name and the corresponding creation date can be combined using the standard parameter **utm_campaign**. For other combination options and further details contact customer support, who will perform the necessary configuration for your Google Analytics integration in your client.

Using and viewing data

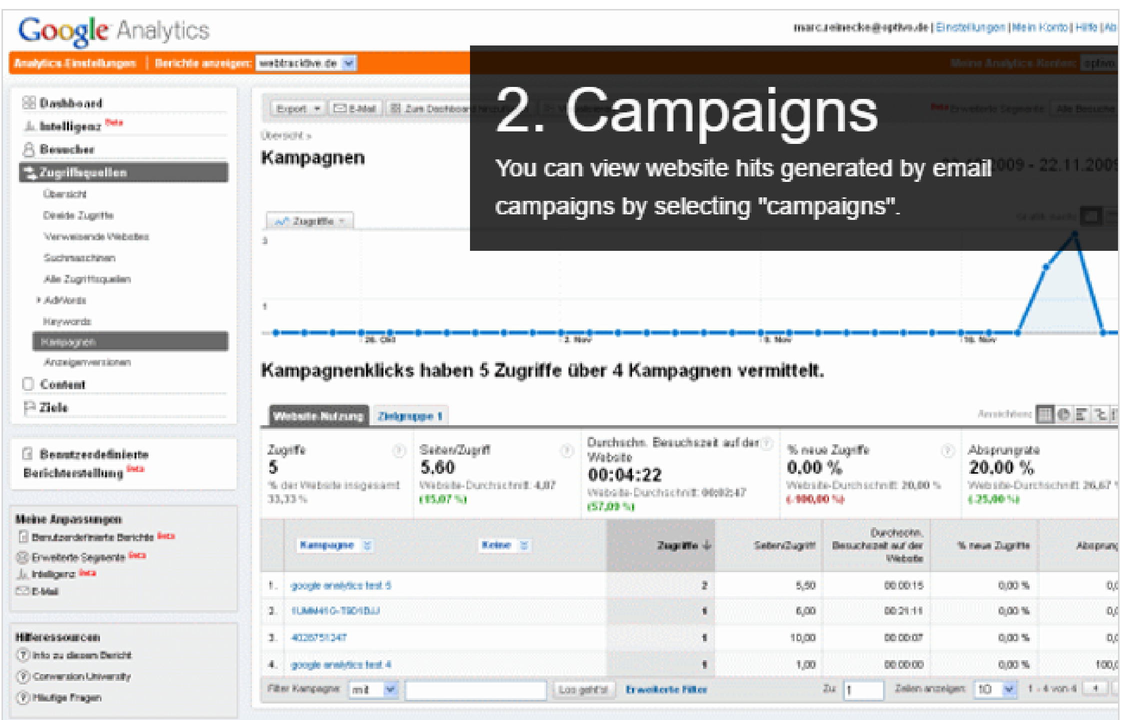
Once a client has been successfully linked with Google Analytics (automatic enrichment of link parameters), no further action is required. In other words, all further steps of data synchronization etc. are carried out automatically and invisible to the user.

In the following, you will find out where and how the values generated by email campaigns can be viewed in Google Analytics:

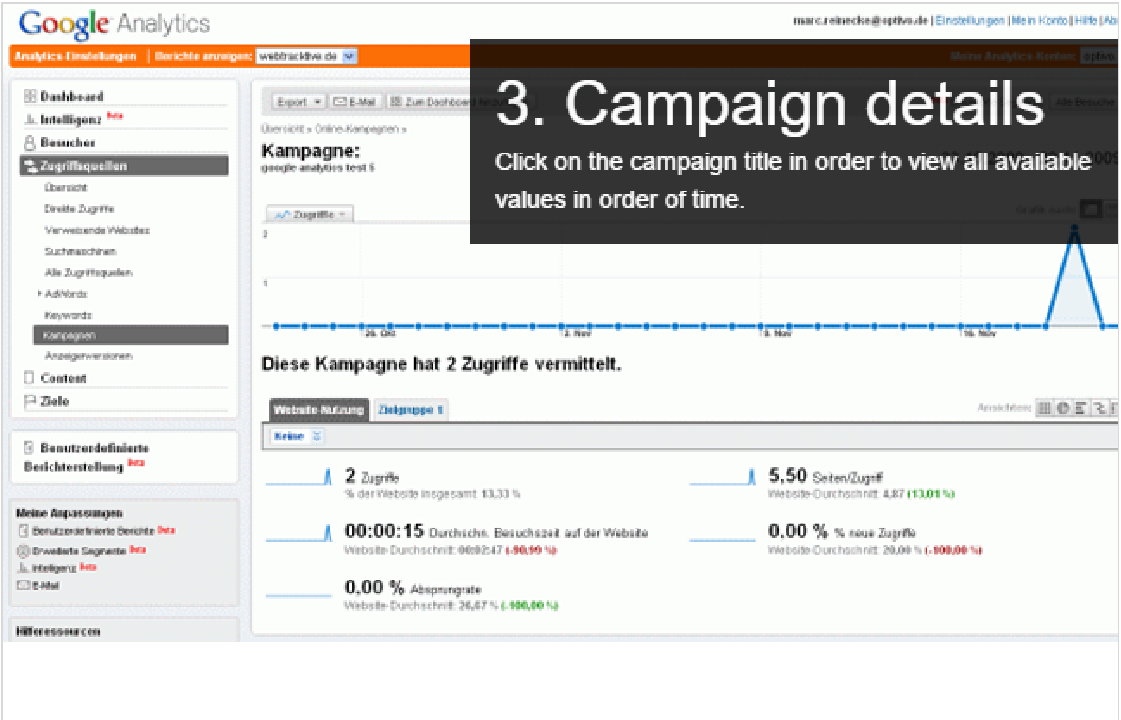
Dashboard



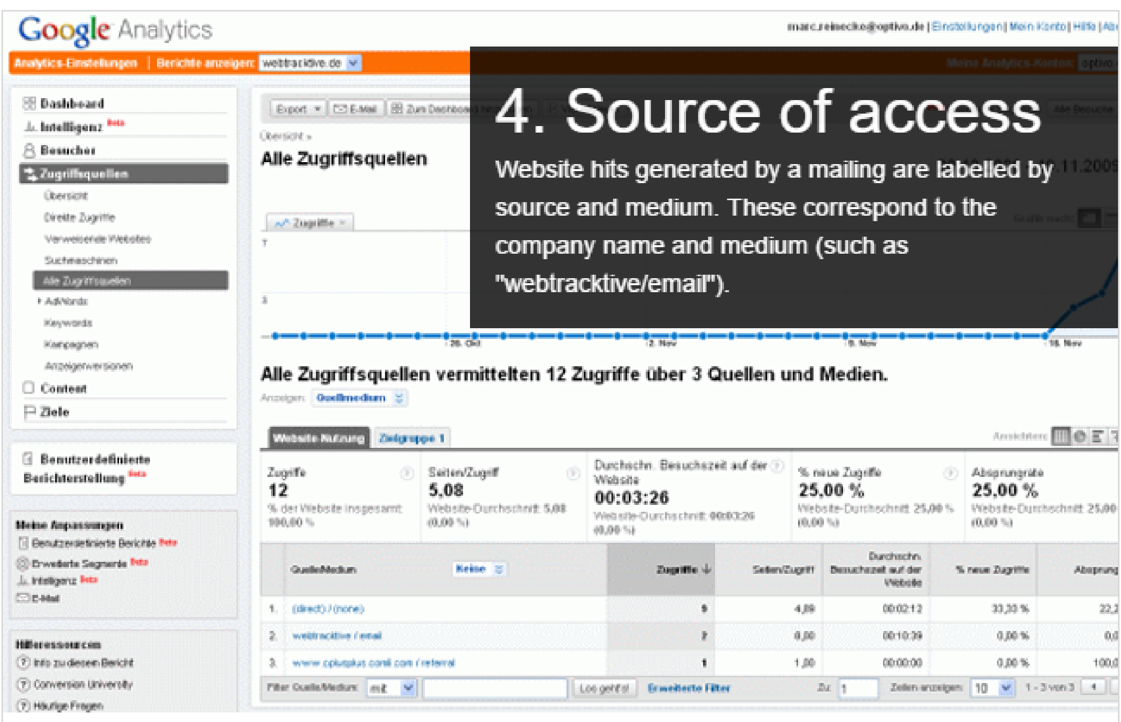
Campaigns



Campaign details



Source of access



CRM Integrations

With our CRM integrations you can do the campaign management, select leads and contacts as usual in your CRM system. The mailing creation and dispatch are done in your Episerver Campaign client. Thus, you can benefit from all the advantages of our professional mailing design tools and our powerful and reliable infrastructure. Send personalized content to your clients and measure the performance of your campaigns directly in your CRM system. Based on the performance data, you can design multi-stage campaigns, re-mailing campaigns and create personalized content.

Integration	Salesforce
Dispatch mailings via Episerver Campaign to contacts and leads	✔
Mailing personalization with CRM data	✔
Sending status visible in CRM system	✔
Dispatch data visible in CRM system	✔
Response data visible in CRM system	✘

CRM guide

Email service providers can be integrated into campaign management, CRM, business intelligence and customer intelligence systems. Episerver Campaign, as an omnichannel solution, not only offers email sending but also SMS, and faxes as part of a campaign. In addition to integrating campaign management, Episerver Campaign also offers synchronization of advertising consents and recipient lists.

- Campaign management. With its closed-loop interface, Episerver Campaign has a standard interface that depicts the data transfer of recipient data and return transport of response data (opt-out, bounces,...) in a fully-automated manner. This allows for recipient data from the CRM system to be flexibly managed. Response data such as openings, clicks, bounces and unsubscriptions can be enriched with an ID. If you are taken back to the CRM, then this ID allows for such events to be organized as a lead or contact in the CRM.
- Opt-in management. In addition to campaign management, double opt-in information can be exchanged between Episerver Campaign and a third-party system. These advertising consents can refer to many different types of media (email, SMS, fax).
- Synchronization of recipient data. Furthermore, Episerver Campaign’s entire range of features is available with the synchronization of recipient lists. You can start with the help of Marketing Automation or Smart Campaigns - fully independent from a CRM system. Bounces and unsubscriptions can also be returned in this case.

Manage campaigns

CRM 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 carried out. Using the closed-loop service, members of a campaign can be transferred to Episerver Campaign. With additional meta information (Client ID and/or opt-in ID and mailing ID), the appropriate mailing is subsequently triggered in Episerver Campaign. Events that follow the campaign, for example openings, clicks, bounces or unsubscriptions are then made available to the CRM.

See the documentation titled Closed Loop Interface for more information on closed-loop services.

Recipient list format and personalization

The recipient list format – i.e. which columns containing what information are transferred to Episerver Campaign – can be freely defined with the help of customer support. Note that the recipient list must contain all the desired personalization information. If, for instance, you wish to use recommendations from the CRM, you must place the product information in the recipient list. If you wish to use a personalized greeting and/or complimentary close (the contact’s sales owner appears as the point of contact in the salutation), then the corresponding sales owner fields must be transferred as well.

In addition, you can add recipient list fields to the response data. This makes it much easier to assign events in the CRM system – for example an open or a click. If, for instance, you provide two fields in the recipient list for a clear identifier of your entities, these can be transferred back into the response data.

Example: A contact has a unique ID <contact-id> and in addition, each campaign has a unique identifier <campaign-id>. Both of these fields will be added to the recipient list and the entities will be transferred to Episerver Campaign. When the recipient clicks on the link in the sent email, he will receive the result with the corresponding <contact-id> and <campaign-id>. This way you can easily assign events to a contact or a campaign response. The fields that are displayed here depend on the CRM system. Normal identification fields may be <contact-id>, <lead-id>, <campaign-id>, <campaign-member-id>, <member-id> or <list-id>.

Protocols and feedback

You can use the protocols SFTP and SOAP for data transfers. You may freely select the protocol; there are no functional limitations. Note that SOAP transfers the data via XML and performance will therefore always be poorer than sending CSV files via SFTP. This especially has an effect in large campaigns with several hundred thousand campaign members.

Once a campaign has been sent, Episerver Campaign can create feedback messages. This can be a simple email notification. Episerver Campaign can also call up SOAP services and systemically display the processing and send status.

Process sequence

After the CSV file has been 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 are 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_CampaignUserLis**t 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 method.
2. After the recipient data has been fully imported, the specified mailing will automatically be copied. If your 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 has been sent, the 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.

> Recipient lists match data base tables. These are generally generated individually according to your requirements. The format must be specified with customer support. The stipulated format is static and may not be changed without consulting customer support. Due to the fact that subsequent changes to the recipient list are complex, the format that has been defined once should not be changed.

broadmail_ID parameter

The **broadmail_ID** always denotes a mailing. The advertising channel (email, fax, SMS) also appears on the mailing. Therefore, the **broadmail_ID** can also be used to trace back the medium. In addition to the obligatory **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 always 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.

Implementation 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.

Start campaign

```
/** * Use case: Initialize 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
// <ac:structured-macro ac:macro-id="fb920fe1-56e2-4ea6-92fb-1fab24bd814f" ac:-
name="broadmail" ac:schema-version="1"/>. 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@optivo.de" , "Wallstrasse 16" ,
"10179" ,
"Berlin" , "Berlin" , "Germany" , "SAP-321XWZ654987" , "SAP-987ABG654223" } ,
{ "Mrs." , "Jane" , "Doe" , "Phd" , "17.2.1952" , "0049307680780" ,
"004930768078199" ,
"it-demo-mrs@optivo.de" , "Wallstrasse 16" , "10179" , "Berlin" , "Berlin" , "Ger-
many" ,
"SAP-321XWZ654988" , "SAP-987ABG654223" } }; _closedLoopWebservice.importRecipients(
_session.getSessionId() ,
_waveId , recipientFieldNames , recipientFieldValues);
// initialize 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.

Campaign information

```
/** * Use case: Receive campaign status.
* Use this code to ask campaign status from <ac:structured-macro ac:macro-id="-
"fb920fe1-56e2-4ea6-92fb-1fab24bd814f" ac:name="broadmail" ac:schema-version="1"/>.
This
* makes sense after calling the use case "Initialize and start campaign" */
private class DetermineCampaignStatus extends UseCase { @Override void run-
Exceptional() throws
Exception { if (_waveId <= 0) { throw new IllegalStateException("waveId not pos-
itive."); }
// 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 = _closedLoopWeb-
service.getMailingIdByWaveId( _session.getSessionId(), _waveId);
if (campaignId <= 0) { sleepOneMinute(); } } while (campaignId <= 0);
// customize this to your needs. After a campaign switched to
// status SENT, the status will be immutable
while (true) { String campaignStatus = _mailingWebservice.getStatus( _ses-
sion.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(), cam-
paignId);
// Log status for messages of campaign too.
long[] messageIds = _splitMailingWebservice.getSplitChildIds( _session.getSessionId
(), campaignId);
for (long messageId : messageIds)
{ String messageStatus = _mailingWebservice.getStatus( _session.getSessionId(), cam-
paignId);
String messageName = _mailingWebservice.getName( _session.getSessionId(), mes-
sageId); } sleepOneMinute(); } }
private void sleepOneMinute() throws InterruptedException { Thread.sleep(TimeUn-
it.MINUTES.toMillis(1)); } }
```

Furthermore, you can also show your campaign manager the available templates. The following example shows a query for the Smart Campaigns.

Query: Available template mailings

```
/** * 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(), cam-
paignType, campaignStatus);
for (long campaignId : campaignIds) { String campaignName = _mail-
ingWebservice.getName( _session.getSessionId(), campaignId);
String description = _mailingWebservice.getDescription( _session.getSessionId(), cam-
paignId);
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); } } } }
```

Response data

Response data processing must be implemented when a campaign is being executed. Bounces, unsubscriptions and replies are part of these processes. Generally, you have the choice of using Episerver Campaign’s features for managing unsubscriptions or implementing proprietary processes in the CRM. Processing unsubscriptions and replies is mandatory. This is 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 unsubscribe link points to the Episerver Campaign platform, then the recipient is added to the unsubscribed list in Episerver Campaign and does not receive any additional emails. The unsubscribed list in Episerver Campaign has precedence over additional mailings. This means, customers 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-look interface. The CRM system must process the unsubscriptions obtained in this manner and save them in the applicable entities. In addition, 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 that are 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 the CRM.

Reply emails

The customer can answer emails and express additional requests such as an unsubscription. Either these returned emails are processed in the Episerver Campaign's user interface, or forwarding to the inbox of your choice is configured in Episerver Campaign.

Additional information

Two additional points must be noted during the technical design of a campaign management using the closed-loop interface.

Data formats

Each field in the recipient list can be filled via the closed-loop interface or the 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. The exact data formats must be consulted with customer support.

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. The HTTP API's documentation describes the appropriate methods and parameters.

Event emails

Event emails are typically emails that are triggered by a certain event. For instance, this event can be a registration, an order or a cancelled order. This type of email can ideally be sent over the HTTP API. Here, you can save a decided recipient list that is suitable for sending these special mailings. You can subsequently link as many mailings as you wish to this recipient list and send results-based emails individually. This type of integration is also suitable for Marketing Automation campaigns that are triggered based on events and points in time.

Implementation example

The following code block shows an implementation example of how the response data can be retrieved.

Response data retrieval

```
/** * Use case: Get response data
* This use case shows how to receive and process response 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 >= num-
berOfRows); 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( _ses-
sion.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.

Resetting the bounce status

```
/** * 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); } }
```

Manage opt-ins

Of course Episerver gives you the option of displaying advertising consents that are multi-channel or different in nature. These can also be synchronized with different fields in the CRM system – provided the CRM has this feature. This allows for a contact or a lead to issue multiple different advertising consents for different newsletters. In this manner, you can retain an overview of the advertising consents you use for different channels in your CRM.

Requirements and how it works

You can connect multiple clients in Episerver Campaign from your CRM. The advertising consents in your CRM are either already saved or you have already performed the necessary adjustments for them. In any case, the CRM should provide a full view of the customers and therefore, all changes to the advertising consents from third-party systems should carry over properly.

For instance, 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, fax, SMS) and/or a certain newsletter. The CRM does not have to make any content-related distinctions and can immediately deal with the advertising consents. The types of consents (contact, lead, account) must be the same for all relevant entities (Boolean value check box or tick box). The types of consents you require in detail depend on your campaign plans and the data structure in your system. You are responsible for depicting it in your CRM.

Events such as unsubscriptions or bounces always relate to a specific advertising consent. In order that the systems involved are consistently aware of the advertising consent and medium related to an unsubscription or a bounce, you must save the appropriate information in your CRM. The easiest way to do so is with a table in which you have saved the advertising consents you are using. Therefore, in this table, each possible advertising consent represents a row. The advertising consent can now be assigned using a unique identification. If, for instance, you need to process an unsubscription from Episerver Campaign, the transferred identification will be used to determine the affected advertising consent. Furthermore, you can also delete all 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

The following list is an example of how a data structure can be set up to manage advertising consents:

- **opt-in-ID**. A generic field for a unique ID issued by CRM (not visible, quasi an AUTO-INCREMENT field, sequence or GUID).
- **description**. A unique name that is displayed to the user and can be used for identification (visible).
- **media-type**. The user can choose from email, SMS and fax from this selection list (visible).

- **broadmail-client-id**. A reference to a client-ID in Episerver Campaign that has already been configured in CRM (visible).
- **reference-bounce**. This field contains a reference to a bounce field (visible). If the field is empty, then no bounce is managed for the channel. This is a mandatory field for the email channel.
- **reference-opt-in**. The reference to an advertising consent in the contact, lead or account entity is saved in this field. Here, you can save the contact or lead field that needs to be administrated.

Instead of saving tables and references, you can, of course, archive the logic in code or XML files for simple applications. The data model suggested here ensures that you always link an advertising consent to a client in Episerver Campaign.

The following table shows an example of how advertising consents may look like:

CRM-ID	Name	Reference field	Typ-e	Client	Reference bounces
AS10345761204	Fan newsletter	crm.custom.lead.fan-opt-in	Email	10344523412435	crm.custom.lead.fan-bounces
FG10457145612104	Premium furniture	crm.custom.lead.premium-opt-in	Email	14351098251023	crm.custom.lead.premium-bounces
SMS10016784235	SMS ticker	crm.custom.lead.sms-ticker-opt-in	SMS	1456123461025	crm.custom.lead.sms-ticker-bounces

Campaign control and data transfer

If a campaign needs to be sent from the CRM, then you only need to select the advertising consent and the mailing template. The client to be used in Episerver Campaign can be determined using the data model for advertising consents.

The technical connection of the closed-loop services must be expanded by additional fields in this scenario. Three additional parameters are transferred to Episerver Campaign in addition to the data of the already-determined recipient list. Consent description, opt-in ID and media type. The opt-in ID and the media type are sent back to the CRM as a component of the closed-loop circle for bounces, unsubscriptions etc.. As soon as an unsubscription or bounce occurs, the CRM enters the cancellation of the advertising consent or the bounce into the appropriate entity (lead, contact,...) accordingly. Using the transferred parameters, you can clearly tell which contacts/leads/accounts and which advertising consent are affected. Furthermore, additional actions can be carried out through the **media-type** field, as described above.

Change bounce or subscription status

Change the bounce status of a recipient in your CRM. For instance, due to the fact that the recipient has ensured that the error would be resolved after a temporary problem, this information must also be sent to Episerver Campaign. Episerver Campaign blocks an email address from sending more messages when there are too many bounces. The usual design patterns for implementing this functionality as part of a CRM are save interceptors or observers with which you can respond to data changes. First of all, this is to be understood only as an example – if necessary, your CRM will use its own design pattern for this case.

The bounce counter is set per client in Episerver Campaign. Therefore, unlock all clients in which the bounce counter was exceeded. You must save the appropriate information to your CRM or, alternatively, reset the bounce counter in all configured clients. To reset the bounce counter per client, you can use the **resetBounceCounter** method from the **responseWebservice** . While doing so, be mindful of the instructions on changing the media type issued in the documentation.

To set the subscription status, you can 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 as well. In this case, an unsubscription will be successfully re-delivered after a successful DOI.

Synchronize recipient data

The data contained in the CRM should be individually copied into Episerver Campaign, e.g. reports, marketing lists or comparable filters in recipient lists. A transfer can take place here once a day.

If you wish to conduct the campaign management in Episerver Campaign, you must copy the recipient data from your CRM into the regular recipient lists. Depending on your requirements and your CRM's data structure, you can define fixed formats for export. CRM users can filter contacts, leads and/or accounts through reports or marketing lists, which are subsequently automated and regularly transferred to Episerver Campaign. Using a data base in your CRM, different recipient lists in different clients can be filled in this manner in Episerver Campaign. The recipient data transferred in this manner can then be used for Smart Campaigns, classic mailings and Marketing Automation with all the Episerver Campaign features.

Implementation

The selection of recipients must always relate to precisely one advertising consent and advertising consents must never be mixed. Determine the desired fields with customer support beforehand. Be mindful here as well that technical fields must also be transferred: **opt-in-id**, **description**, **media-type**, **entity-type** (**contact**, **lead**, **account**, ...), **entity-id** (ID of the contact/lead/account from the CRM).

Incremental export processes have proven less robust in practice. We recommend clearing the list once per day (Method called **clear** from **RecipientWebservice**) and fully re-fill it (Method called **addAll3** from **RecipientWebservice**). All unsubscriptions and bounces from Episerver are imported into the CRM before the data transfer. This is done using two CSV files (bounces and unsubscriptions) that are requested by Episerver Campaign via SOAP. This prevents unsubscribed and bounced out subscribers from being put on the recipient list once again during the copy process.

Response data

If recipient data from synchronized recipient lists are used for campaigns in Episerver Campaign, then the respective campaign context is unknown in CRM. Therefore, it generally does not make any sense to make information such as opens or clicks available to the CRM in the feedback channel. This data can be made available if the CRM is able to 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 then be accordingly set to the applicable entities.

If a response data flow is configured, then the response data will always be exported for all of a client's mailings. This can be imported into your CRM. It does not matter whether an email was sent via the HTTP API, as a campaign email via closed loop or as a standalone mailing in Episerver Campaign. The opens and clicks were ignored accordingly for campaign responses that did not have any campaign in the CRM.

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.

Concluding information

Blacklists always use the email address as a primary criterion. If an email address is entered into the blacklist, then no emails are sent to this address. Irrespective of whether it is an important matter or not (like an order confirmation). Blacklists can be managed using Episerver Campaign’s front-end.

- All features can be used in parallel in Episerver Campaign. Note the limitations for the recipient lists.
- Always use UTF-8 as the data format.
- File names must be unique, this also applies for delivering campaign data.
- If you use the file API, always use the header rows if possible. This makes troubleshooting significantly easier.

Microsoft Dynamics CRM Integration

Easily send campaigns from your Microsoft Dynamics CRM via Episerver Campaign. The seamless integration allows you to quickly and securely send high volumes of correspondence via email, SMS, and fax.

Add contacts and leads to a campaign and use the contact data for automatic personalization of the mailing contents in Episerver Campaign. Start your campaign mailings with a click from the Microsoft Dynamics user interface and receive reports on the send status as well as returned emails/recipient response data (opens, clicks, direct replies, outbounces and unsubscribes).

Special feature: The integration allows you to copy your CRM marketing lists into Episerver Campaign recipient lists. This can then be used, for example, to automatically include new CRM contacts in a marketing automation campaign and send welcome mailings, birthday mailings and much more.

The solution is provided by optivo broadmail. optivo is an Episerver company.

Range of features and supported versions

The Microsoft Dynamics integration from Episerver Campaign supports the following features and versions.

Feature	Microsoft Dynamics 365	Microsoft Dynamics CRM 2016	Microsoft Dynamics CRM 2015	Microsoft Dynamics CRM 2013
Campaign management	✓	✓	✓	✓
Transfer of recipient data	✓	✓	✓	✓
Copy marketing lists into Episerver Campaign	✓	✓	✓	✓
Transfer of returned emails/response data	✓	✓	✓	✓
Synchronize unsubscribes and	✓	✓	✓	✓

Feature	Microsoft Dynamics 365	Microsoft Dynamics CRM 2016	Microsoft Dynamics CRM 2015	Microsoft Dynamics CRM 2013
outbounces				

Integration setup

To set up Microsoft Dynamics integration in your client, please contact the Episerver customer support team and ask for the integration software package. Provide the following information:

- Your SOAP API user name in Episerver Campaign. If you do not have a SOAP API user account, the customer support team will be happy to set this up for you. In order for us to do this, please create a separate email address that you do not use for logging into Episerver Campaign.
- Let us know whether, in addition to the standard data, you would like additional CRM data to be transferred into your Episerver Campaign recipient list (see section Configure additional fields for the recipient list).
- The client IDs that are to be used with the integration

  > To view your client ID, open the Episerver Campaign start menu, and under **Administration**, click **API overview**. Then switch to the **SOAP API** tab.

- If you would like to synchronize your marketing lists with Episerver Campaign: Let us know the IDs of the corresponding recipient lists. Alternatively, the optivo customer support team can create new recipient lists for you.

  > To view your recipient list IDs, open the Episerver Campaign start menu, and under **Administration**, click **API overview**. Switch to the **Recipient lists** tab.

The following pages will tell you how to install, configure and use the integration. If you have any difficulties, please refer to the Maintenance and troubleshooting section of this chapter.

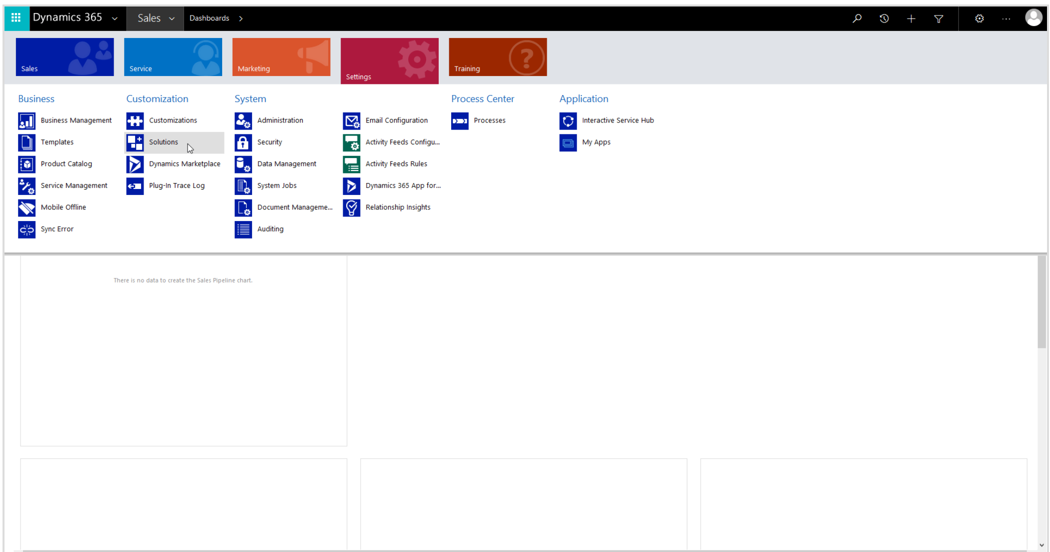
> The following instructions show the individual steps required for the Microsoft Dynamics 365 online version. These fundamentally take the same approach as for the on-premises versions, but may differ slightly in the details.

Installation

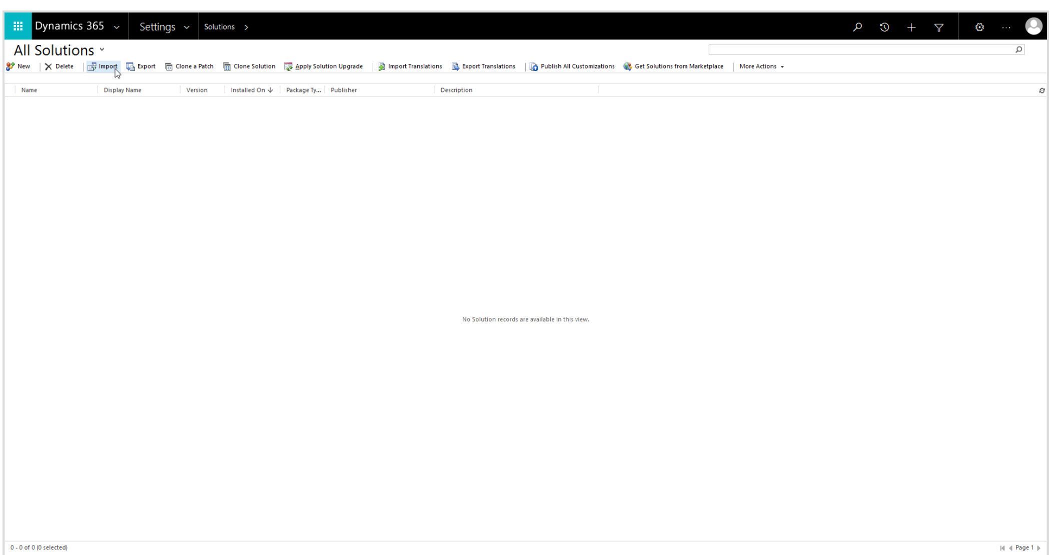
Once you have received the software package from the Episerver customer support team, you must install it in your Microsoft Dynamics CRM. Perform the following steps.

Initial installation

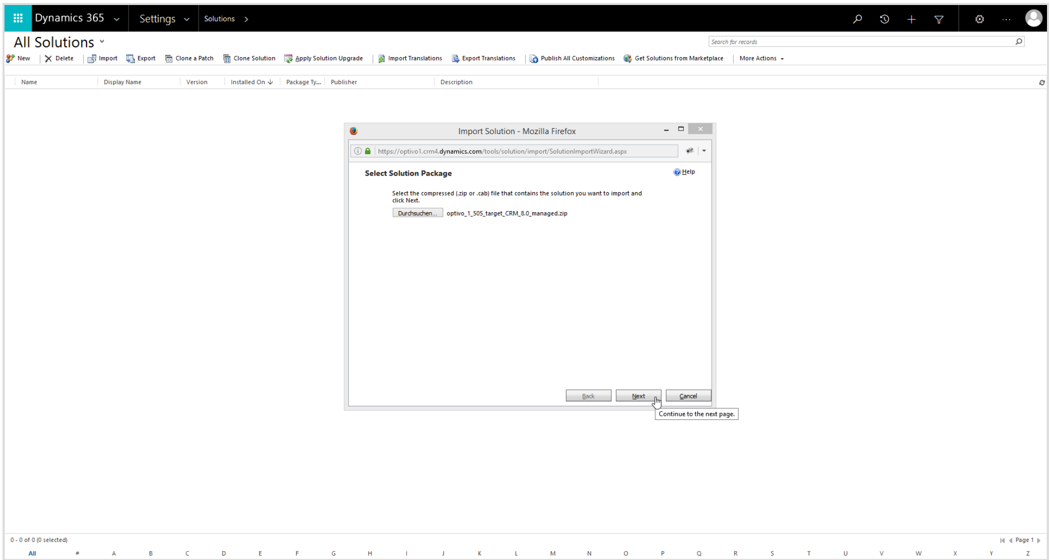
1. Log into your Microsoft Dynamics CRM with administrator rights.
2. Open the settings and in the **Customization** menu, click **Solutions**.



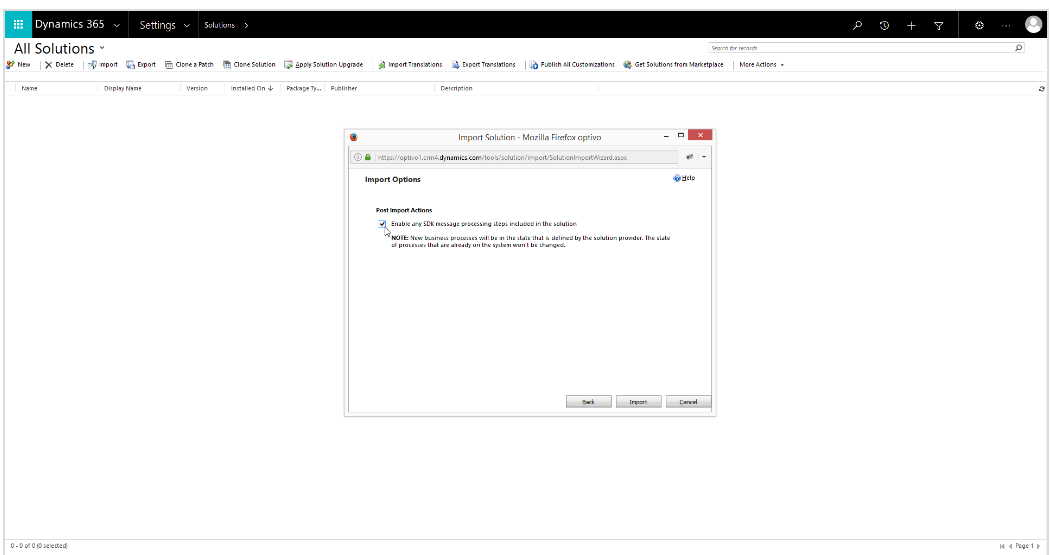
3. Click **Import**. The Import Solution window opens.
4. Select the file that you would like to upload.



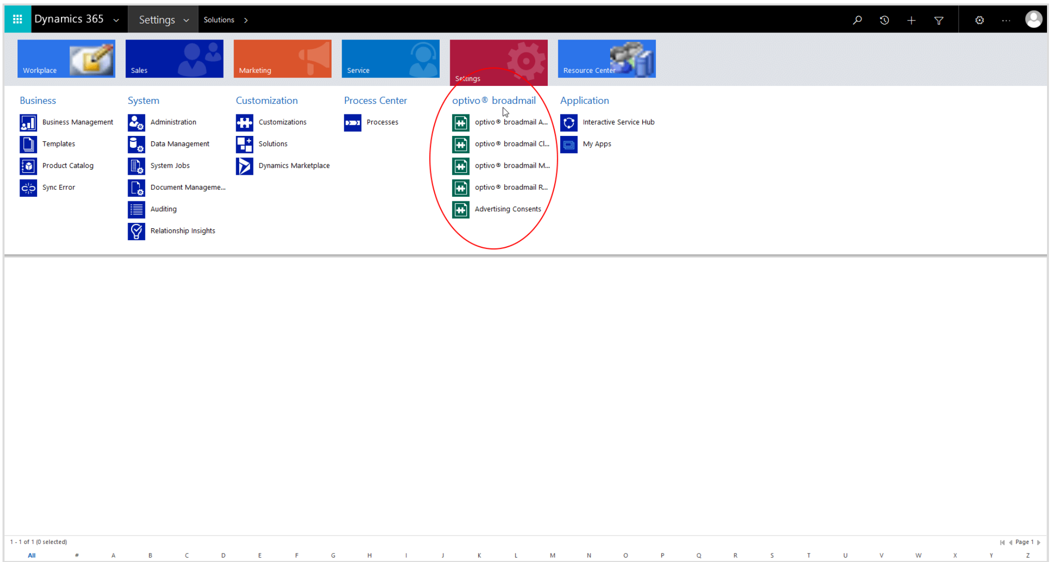
5. Select the compressed integration software package (the ZIP file) and confirm your selection by clicking **Next**.
6. Once the file is uploaded successfully, information about the software package is displayed including the name, publisher and package type.



7. Click **Next**. The Import Options window opens.
8. Select the **Enable any SDK message processing steps included in the solution** check box.



9. Click **Import**. The import process will start and the progress is displayed. Once the import process has completed successfully, you are given the option to download the log files. The settings in your CRM now has an additional optivo® broadmail area.



The integration provides two roles:

- **Administrator**. Allocate the CRM users to this role who will manage the integration and, for example, modify settings.
- **User**. Allocate the CRM users to this role who will send campaigns via Episerver Campaign.

Software updates

To install a software update for the Microsoft Dynamics Integration, follow the instructions as described in Initial installation.

The difference compared to the initial installation is that you will receive a notification that the file you have uploaded is an update for a solution that is already installed.

To keep your integration settings and data, such as user accounts, passwords and response data, activate the option **Maintain customizations (recommended)**.

Note: The update process may take several minutes.

Configuring MS Dynamics CRM integration

After installation you must next configure Microsoft Dynamics CRM integration. Configuration consists of 4 tasks:

1. enter the SOAP API user data
2. enter the client IDs
3. start the response data workflows
4. create advertising consents and link them with the client

If you would like to transfer fields that are not included in the standard configuration, then you must also configure the additional fields for your Episerver Campaign recipient list.

Enter SOAP API user data

Communication and exchange of data between Microsoft Dynamics and Episerver Campaign takes place via an interface, the SOAP API.

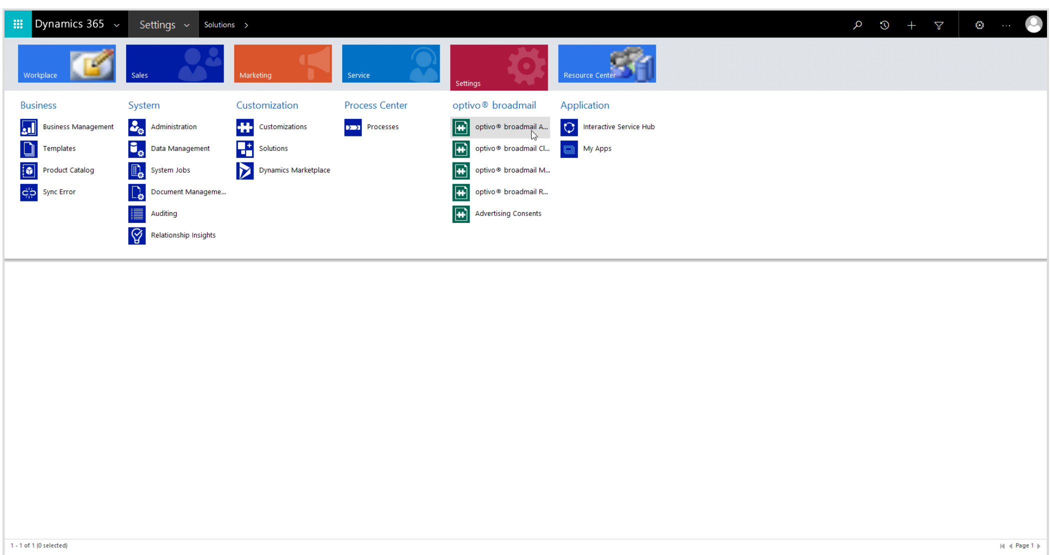
To link your CRM with Episerver Campaign via the interface, you must enter your SOAP API user data in Microsoft Dynamics. To do this, perform the following steps:

> If you do not yet have a user account for the SOAP API, contact the Episerver support to set up a user account in the relevant client for you.

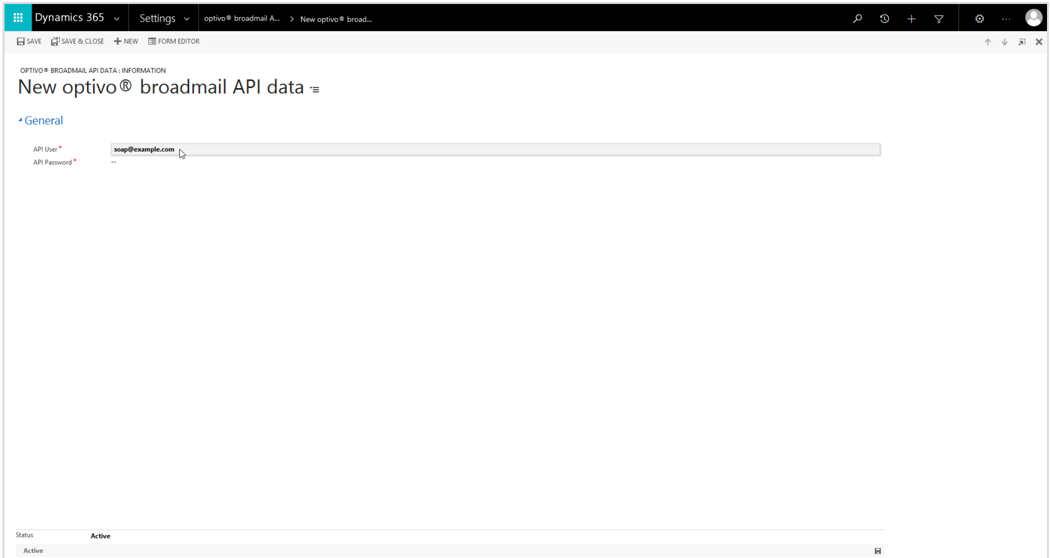
1. Log into Microsoft Dynamics CRM with administrator rights.
2. Open the settings and under the menu item **optivo® broadmail**, click **optivo® broadmail API data**.

   > Installation of the optivo integration adds a new **Episerver Campaign** section to your CRM settings.

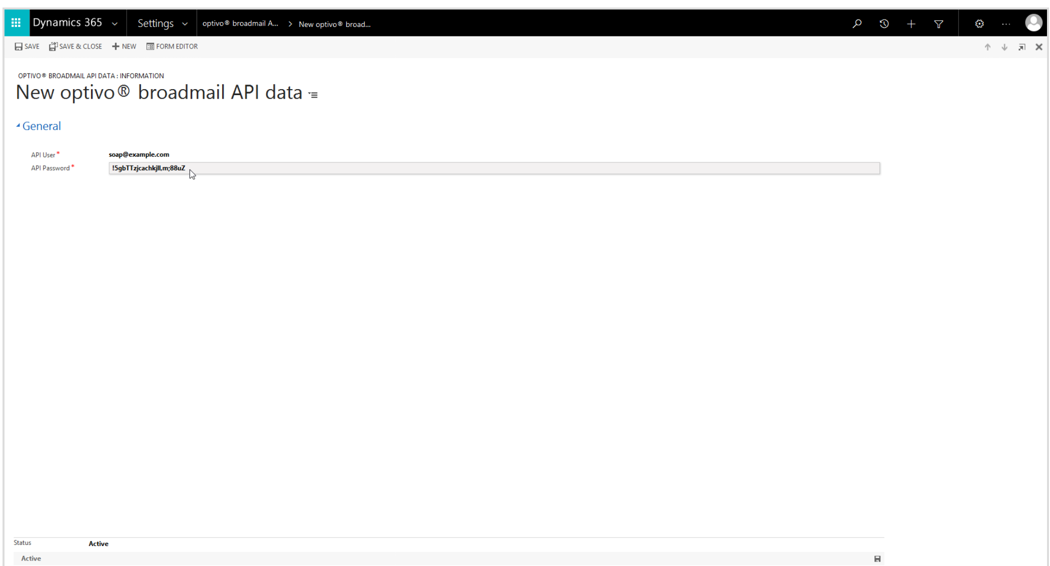
3. Click **New**.



4. Under **API User**, enter your SOAP API user name.



5. Under **API Password**, enter your SOAP API password.

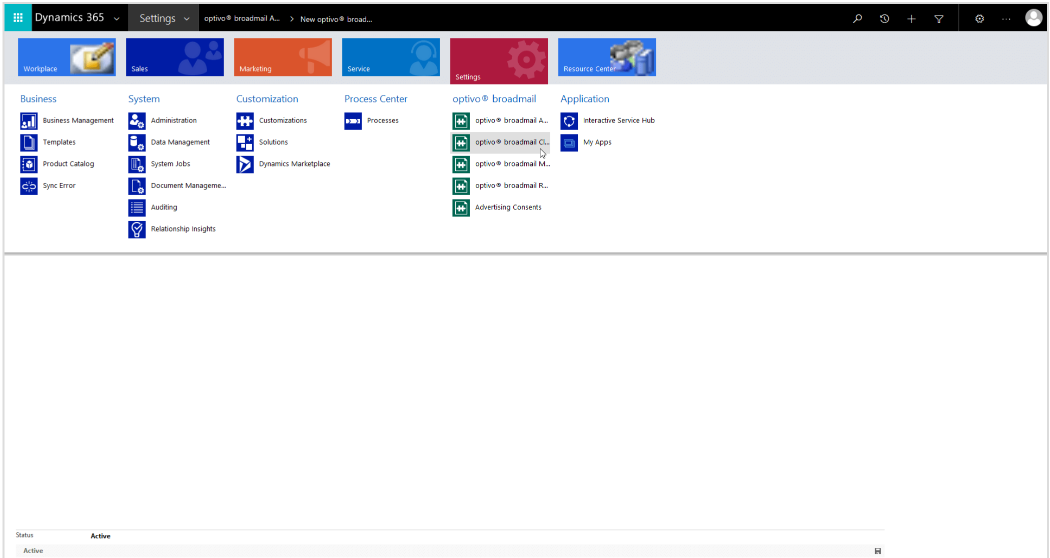


6. To save your entries, click **Save & Close** or click the disc symbol in the bottom right. You have successfully completed the 1st configuration task and entered your SOAP API user data into Microsoft Dynamics.

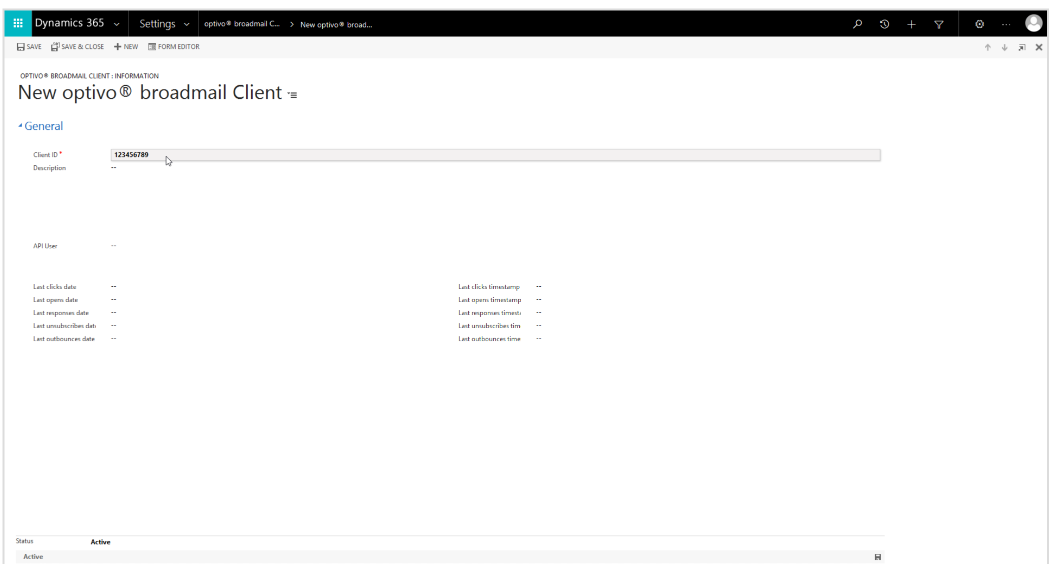
Enter client IDs

In order to run campaigns, you must specify in your Microsoft Dynamics CRM which Episerver Campaign client is to be used for sending. Perform the following steps.

1. Open the settings and under the menu item **optivo® broadmail**, click **optivo® broadmail Clients**.



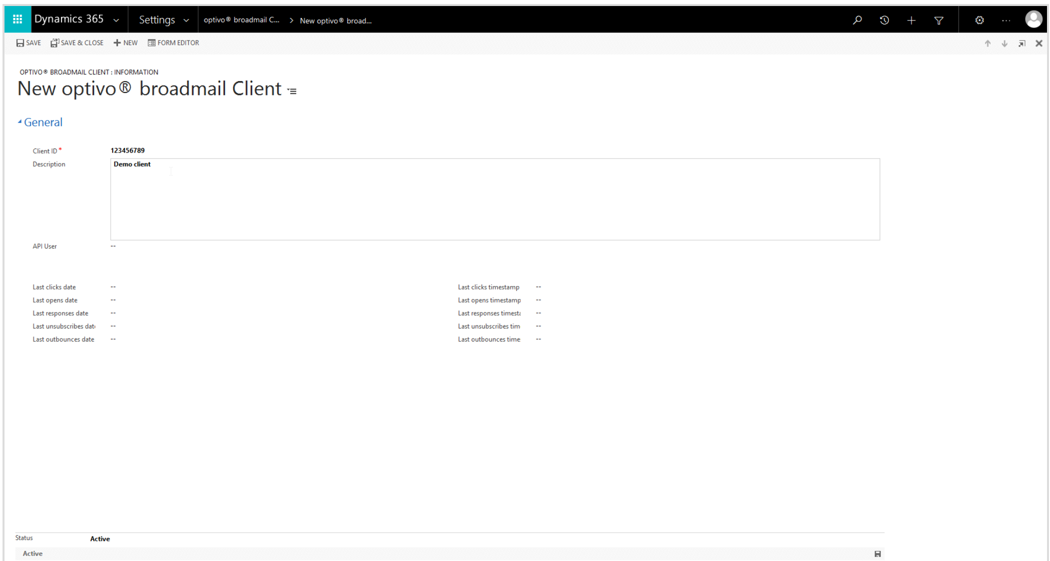
2. Click **New**.
3. Under **Client ID**, enter the ID of the client which should be used for sending campaigns.



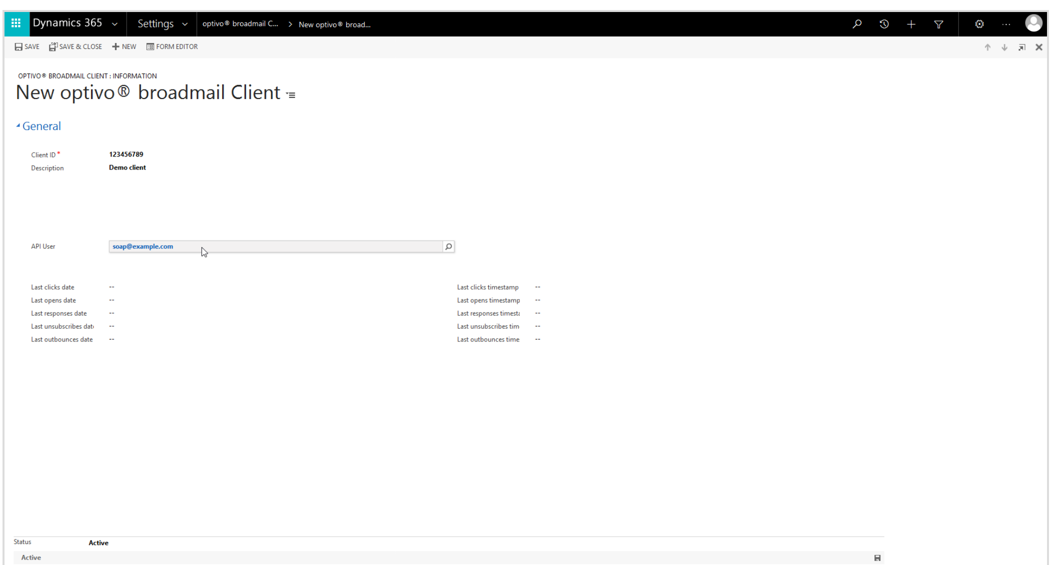
To view your client ID, open the Episerver Campaign start menu, and in the **Administration** menu, click **API overview**. Then switch to the **SOAP API** tab.

4. Under **Description**, enter the name of the client.

> The name of client is displayed at top right in the menu bar in Episerver Campaign.



5. Under **API User**, select your SOAP API user (see section Enter SOAP API user data).



6. To save your entries, click **Save & Close** or click the disc symbol in the bottom right.

7. If you would like to add more clients, repeat the steps for each additional client. You have successfully completed the 2nd configuration task and entered your client IDs into Microsoft Dynamics.

Start response data workflows

In order to have campaign response data from your contacts and leads from Episerver Campaign feed into your CRM, you must start the response data workflows for each individual client.

> The workflows query your recipient response data in 60-minute intervals and import the data into the Microsoft Dynamics CRM.

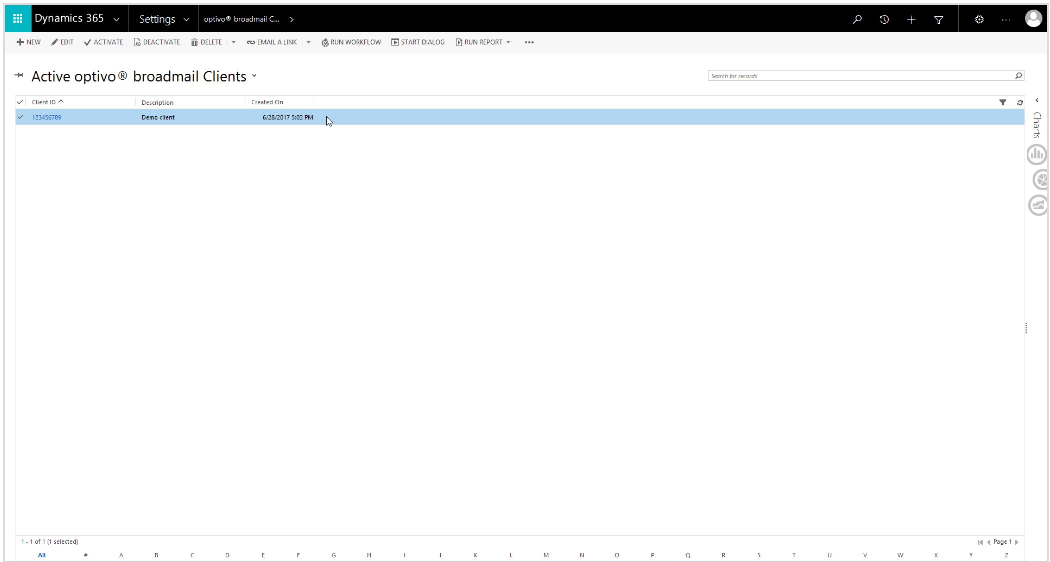
The following workflows are available for each response type:

Workflow	Response type
bm Get opens from optivo® broadmail	Mailing opened
bm Get clicks from optivo® broadmail	Link clicked in the mailing
bm Get responses from optivo® broadmail	Direct reply to the mailing
bm Get unsubscribes from optivo® broadmail	Newsletter unsubscribes
bm Get outbounces from optivo® broadmail	Outbounce (the recipient has exceeded the bounce limit)

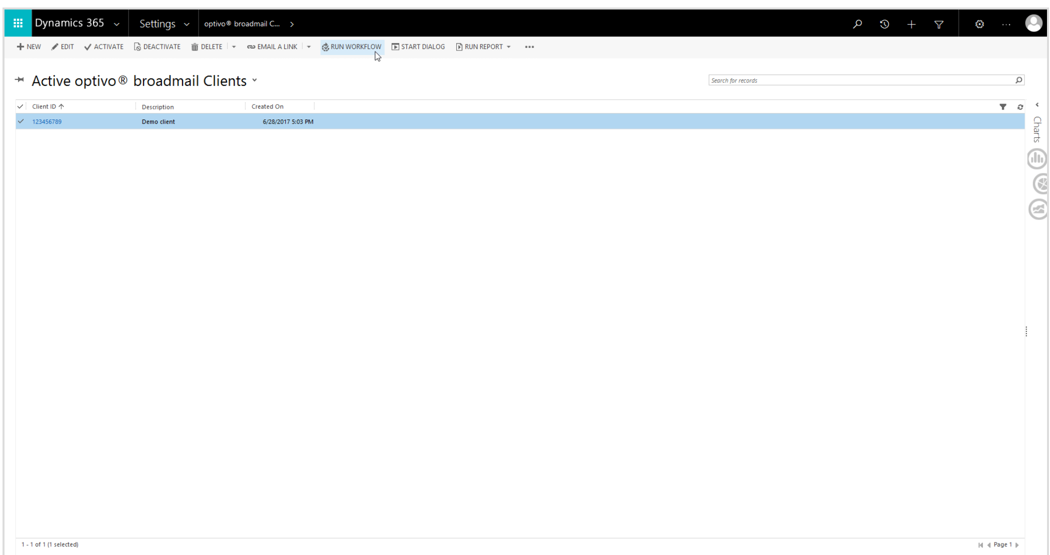
To start the workflows, perform the following steps.

1. Select the clients for which the workflows should be started.

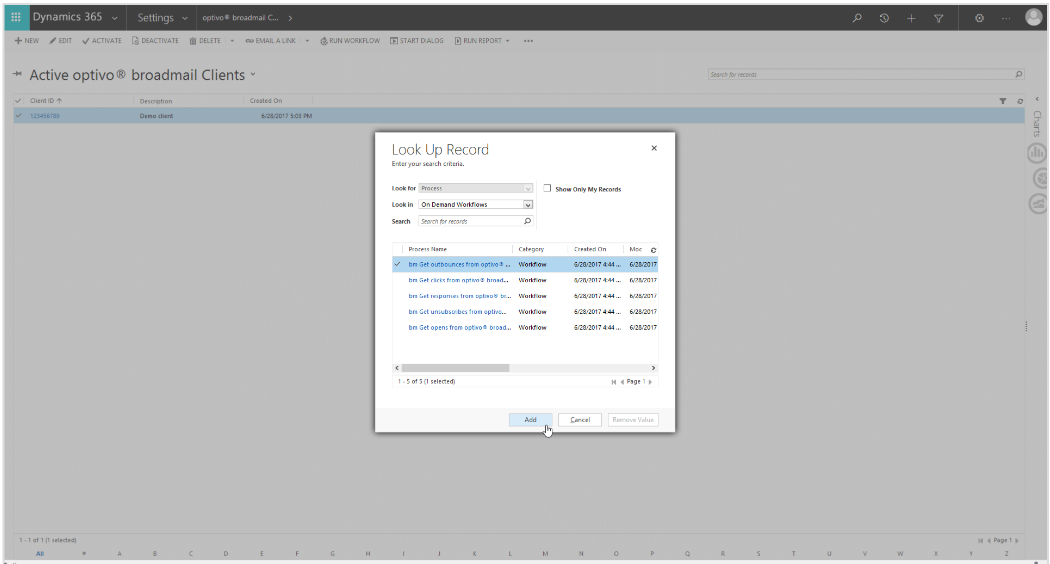
   > If the window with the list of clients does not open, go to the settings and in the **optivo® broadmail** area click **optivo® broadmail Clients**.



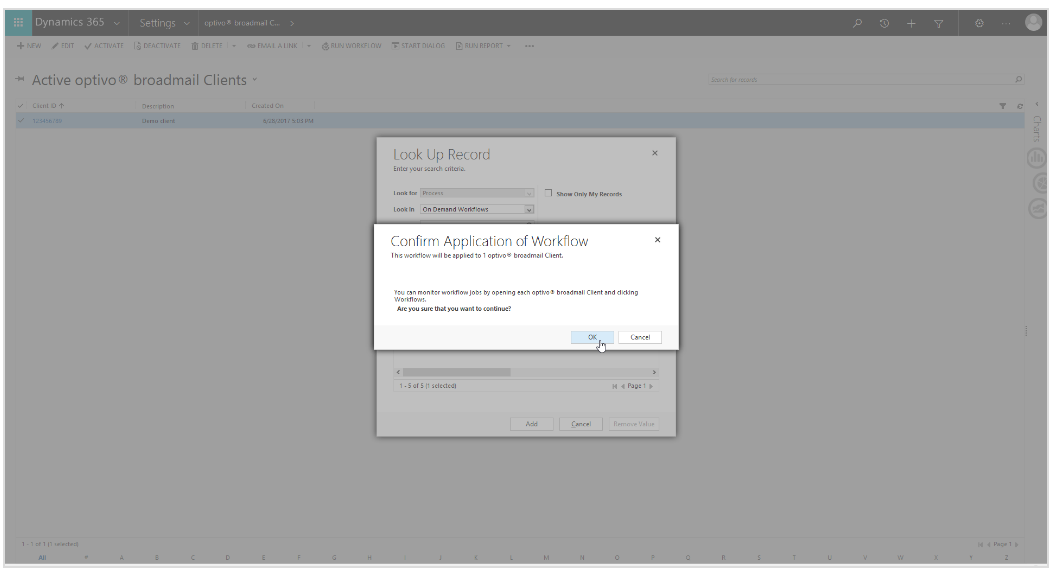
2. Click **Run Workflow**. The Look Up Record window opens.



3. Select a workflow and click **Add**.



4. Click **OK**. The window closes again. You have successfully started the selected workflow.



5. Repeat steps 1-4 for each individual workflow.

   Once you have added each of the workflows, you will have successfully completed the 3rd configuration task.

> You can view workflow activity in the **Information** view for the client. To open this, click the corresponding client ID in the client list. In the window that opens,

below the access data you will see the time that it was last run and the timestamp for the most recently imported data.

Create advertising consents and link to the client

To protect recipients from unwanted advertising, email and omnichannel marketing requires an *advertising consent*: You must always get the consent of your contacts and leads in order to send mailings to them (see also section Opt-ins).

When running, the integration checks each individual contact and lead to see if advertising consent has been given or withdrawn, and will not transfer any recipients which have not given consent.

To check this, the integration looks at two fields in Microsoft Dynamics which you must set up:

- Field 1: Presence of the advertising consent
- Field 2: Functionality of the advertising consent (bounce status)

For more information on the bounce status, see section Consequences of an outbounce .

This configuration step requires you to:

- set up both advertising consent fields
- create the advertising consent and associate the fields with it

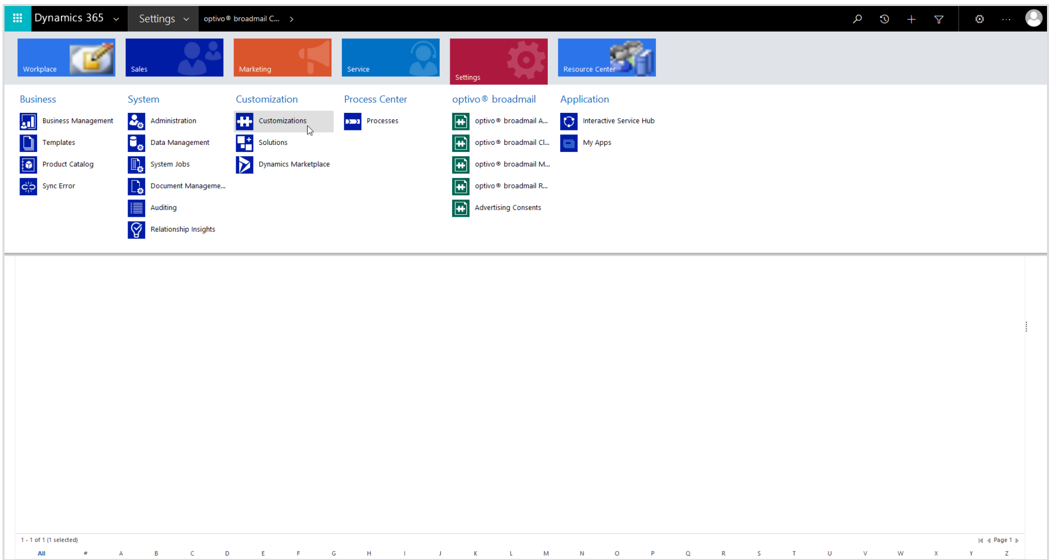
Perform the following steps:

If you have already created fields for advertising consent in your CRM, and import and maintain the data, then you can use these existing fields with the integration without having to create new fields. This requires that the existing fields use the data type **Two options**.

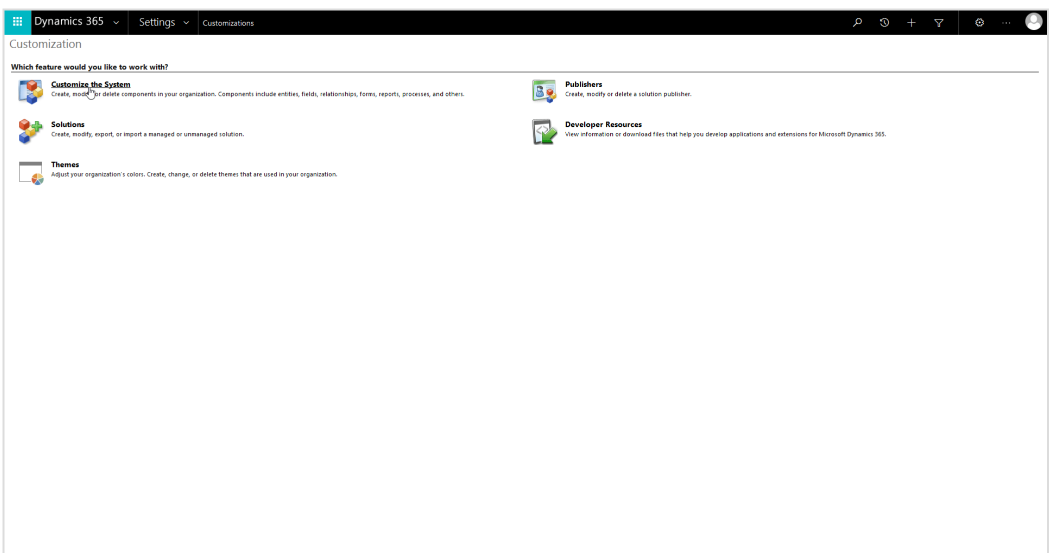
Field 1: Presence of advertising consent

Create field 1

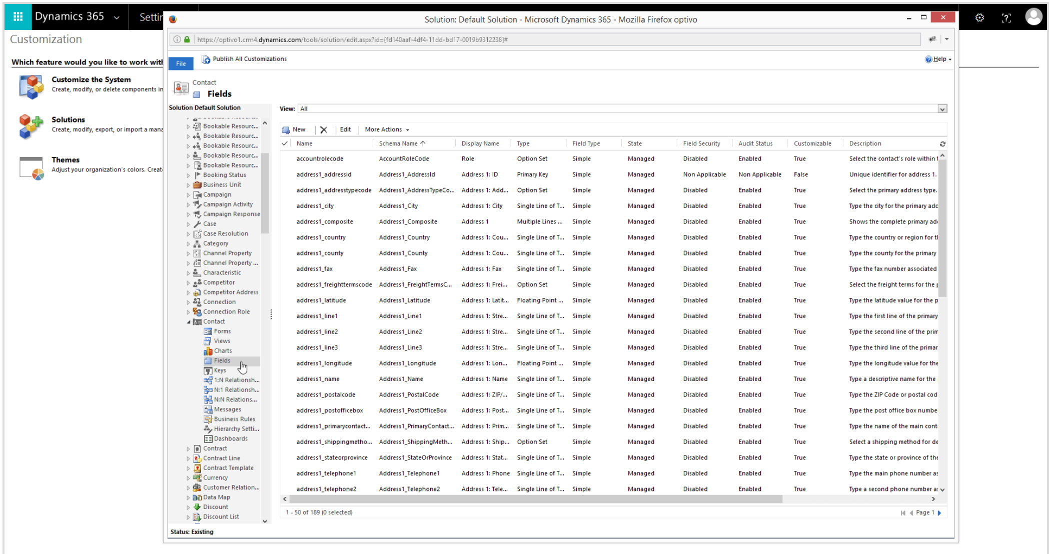
1. Log into your Microsoft Dynamics CRM with administrator rights.
2. Open the settings and in the **Customization** menu, click **Customizations**.



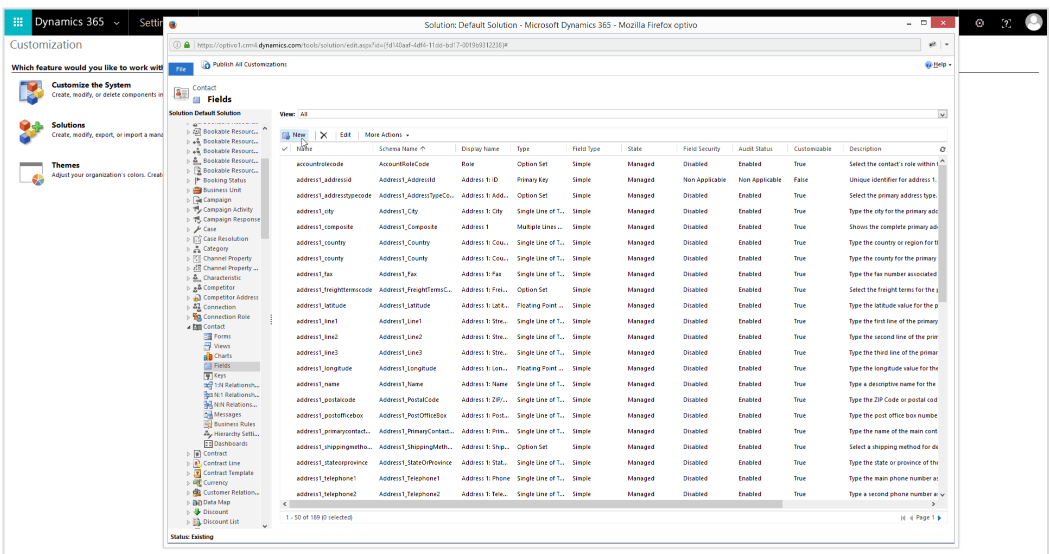
3. Click **Customize the System**. The Information window opens.



4. Use the side navigation to navigate to **Components > Entities > Contact or Lead > Fields**.

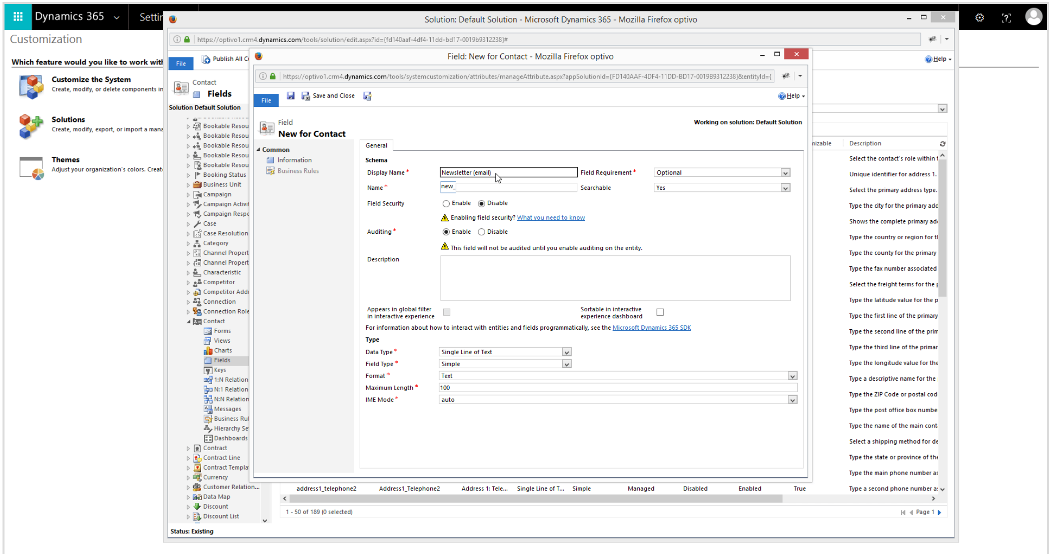


5. Click **New**.

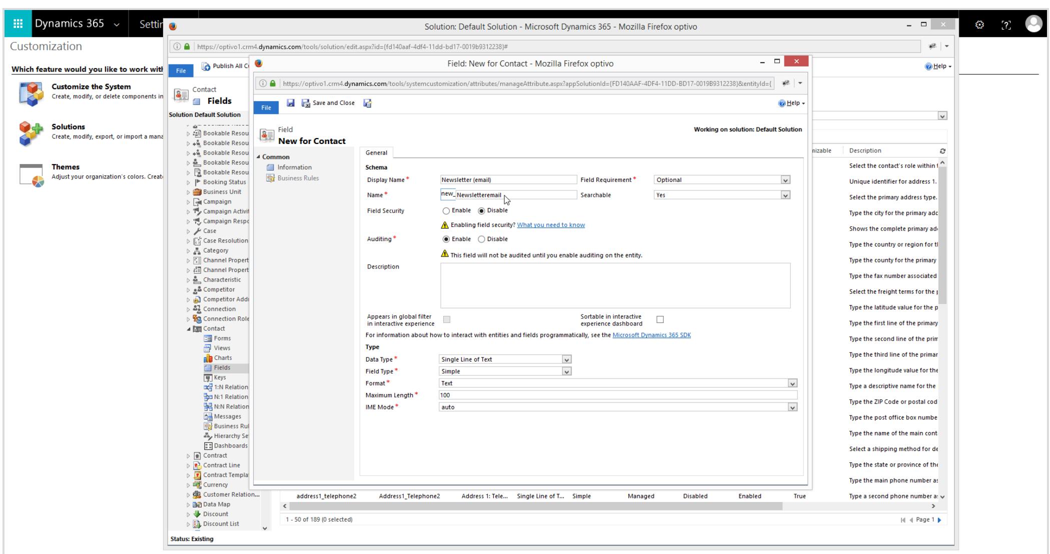


6. Under **Display Name**, enter a name for the field.

Enter a name that is meaningful, such as *Newsletter (email)* or *Updates (SMS)*.



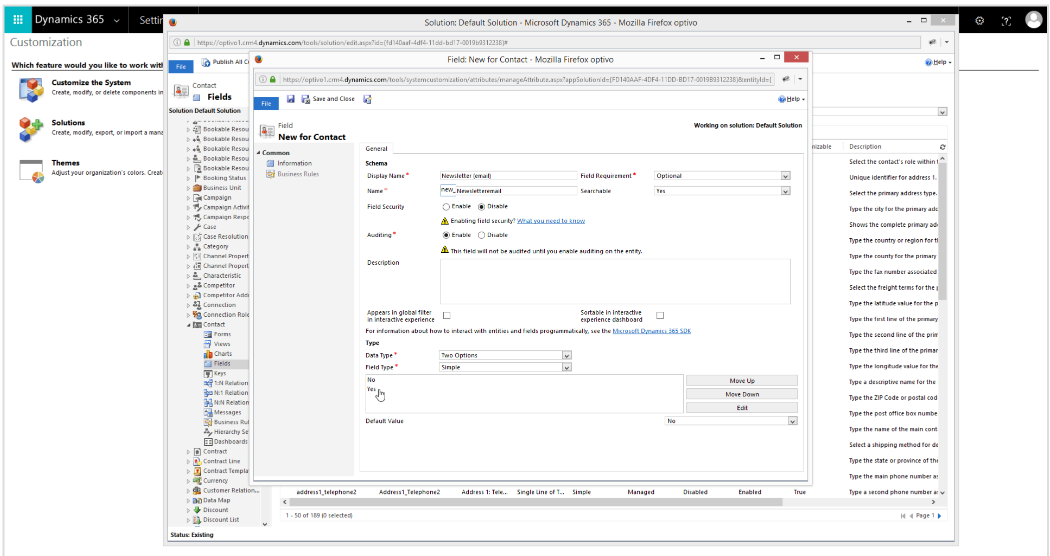
7. Once you have entered a name under **Display Name**, click into any other field and your entry will be automatically copied into the **Name** field (without any spaces or special characters) with the prefix **new_** added to it.



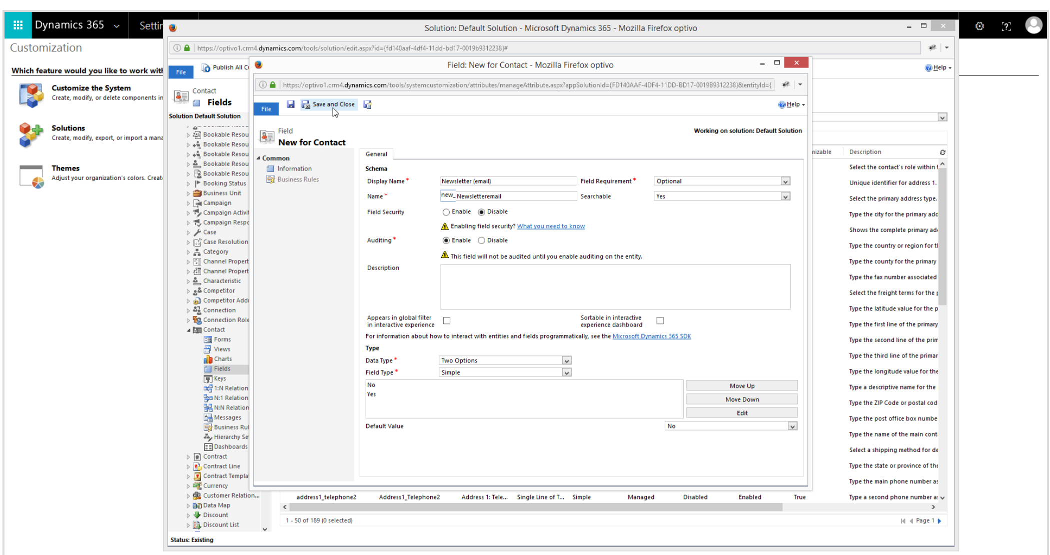
8. Make any changes to the automatically created entry in the **Name** field, e.g. change it to **new_newsletteremailcontac**t.

If you make changes to this field, do not use any spaces or special characters.

9. Make a note of the entry in the **Name** field. You will need this later when creating the advertising consent.
10. Under **Field Requirement** select **Optional**.
11. In the **Description** field, enter a description for the field (optional, not required).
12. Under **Data Type**, select the entry **Two Options**. A field containing the options **No** and **Yes** appears.



13. Under **Field Type**, select the entry **Simple**.
14. Click **Save and Close**.



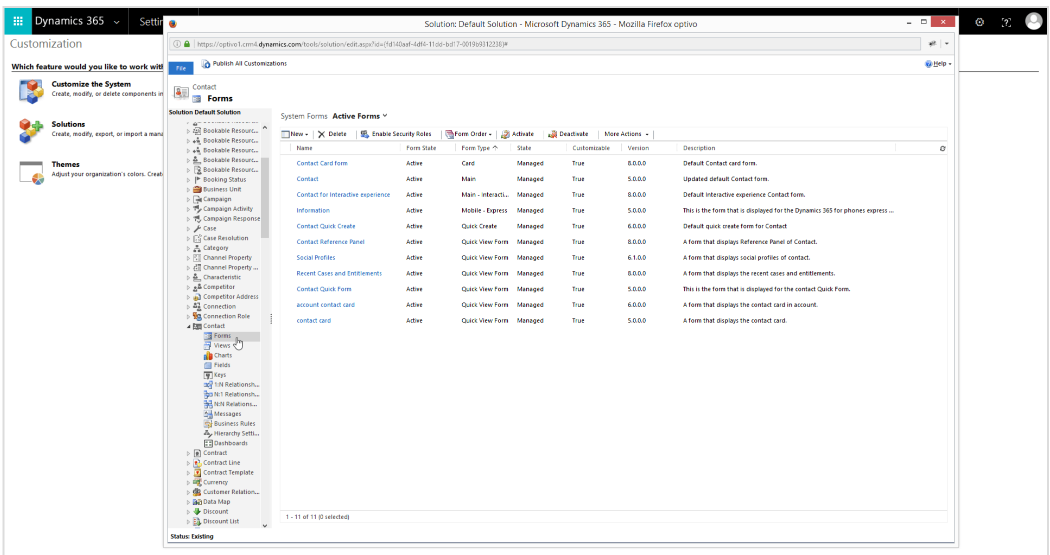
You have successfully created a field for checking the presence of the advertising consent (yes/no).

Add field 1 to the contact or lead form

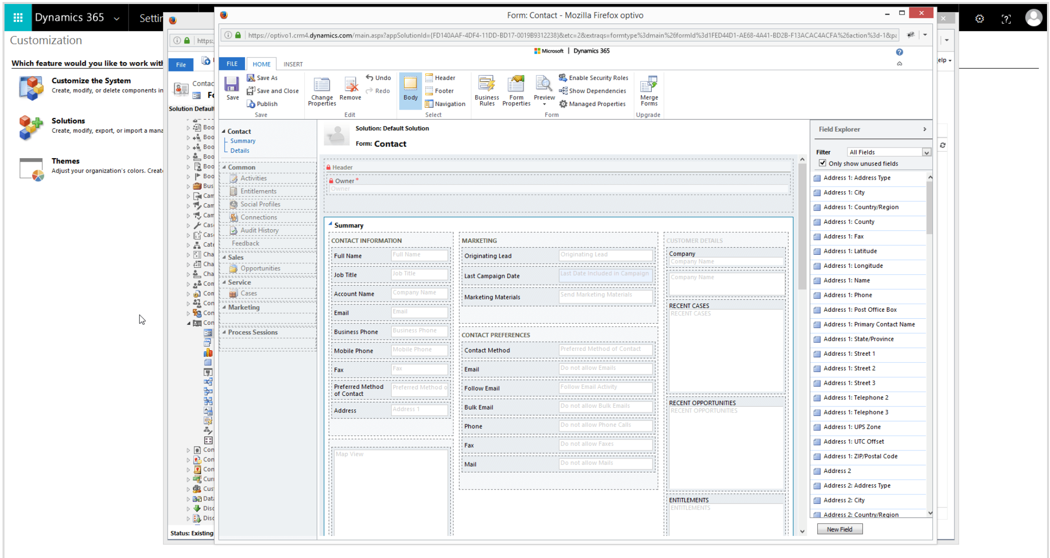
In the next step you must add the field you just created for checking the presence of advertising consent to your contact and lead form. Perform the following steps:

> If you have already made some customizations in your Microsoft Dynamics CRM, then we recommend at least adding the new field to the standard contacts and leads form.

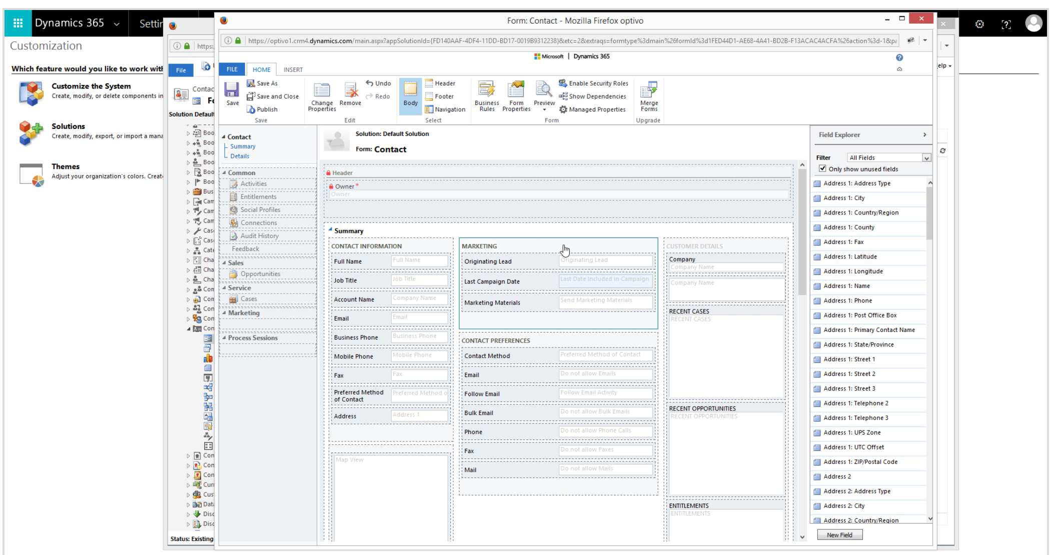
1. Use the side navigation to navigate to **Contact > Forms or Lead > Forms**. A list of active forms appears.



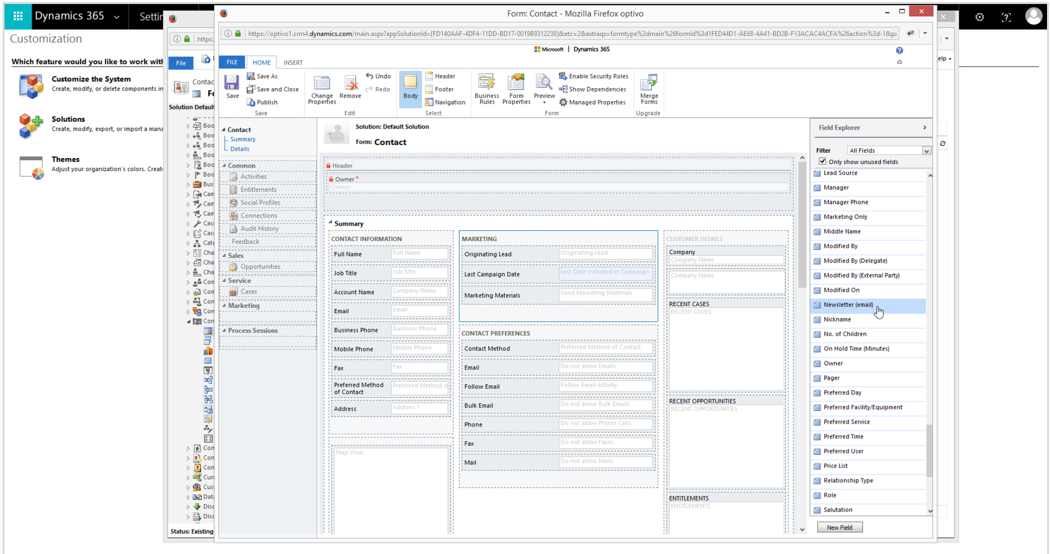
2. Click the form to which you wish to add the advertising consent presence field. A structure view of the selected form opens.



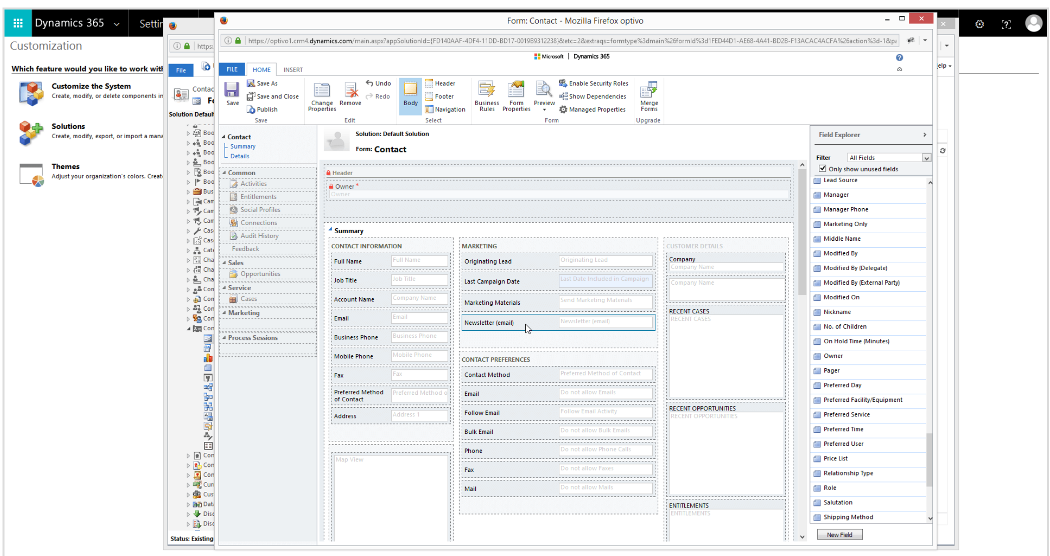
3. In the structure view, select the area where the field for presence of advertising consent should be displayed, such as **Marketing** by clicking it. When the area is selected, the surrounding dashed line becomes solid.



4. On the right, open the **Field Explorer** and browse through the list for the field that you created for the advertising consent presence. If necessary, you can use the filter options to reduce the number of fields shown.



5. Once you have found the advertising consent field in the field explorer, double click it to add it to the selected area. When successfully added, the field will be displayed in the desired section of the structure view.



Field 2: Functionality of advertising consent

Create field 2

Create an additional field for the bounce status. The procedure is the same as described under **a) Create field 1**.

The **Display Name** for this field should also clearly indicate the channel, e.g. **Bounce limit exceeded (email)** or similar. A new entry for **Name** will be automatically suggested based upon what you enter into **Display Name**. If you want to make changes to this field, do not use any spaces or special characters. Make a note of the entry in the **Name** field.

Add field 2 to the contact or lead form

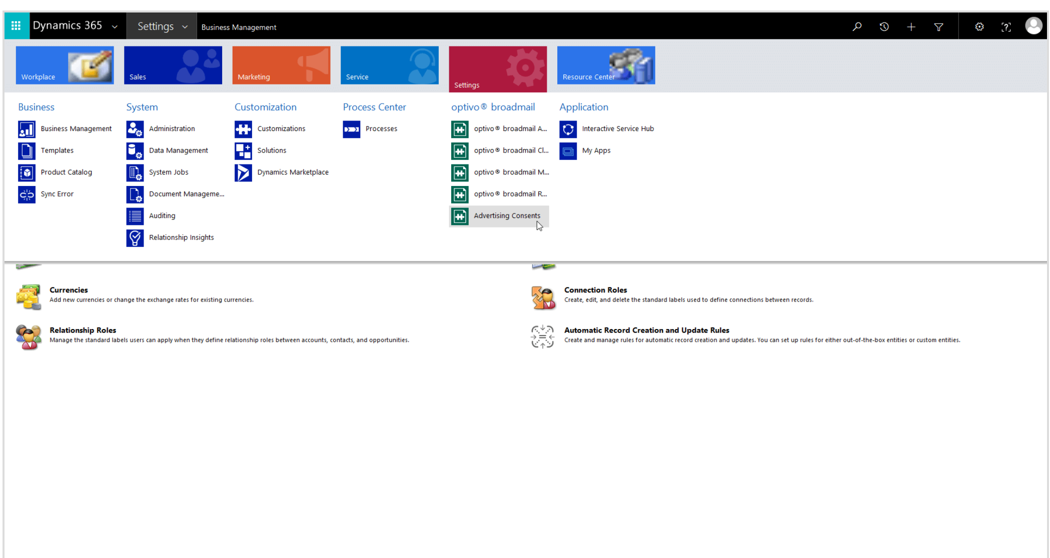
To view the functionality of each marketing channel, add the bounce status to the contact or lead form. The procedure is the same as described under Add field 1 to the contact or lead form.

After setting this up, do not forget to activate the changes to forms and fields for CRM users using the **Publish All Customizations** button.

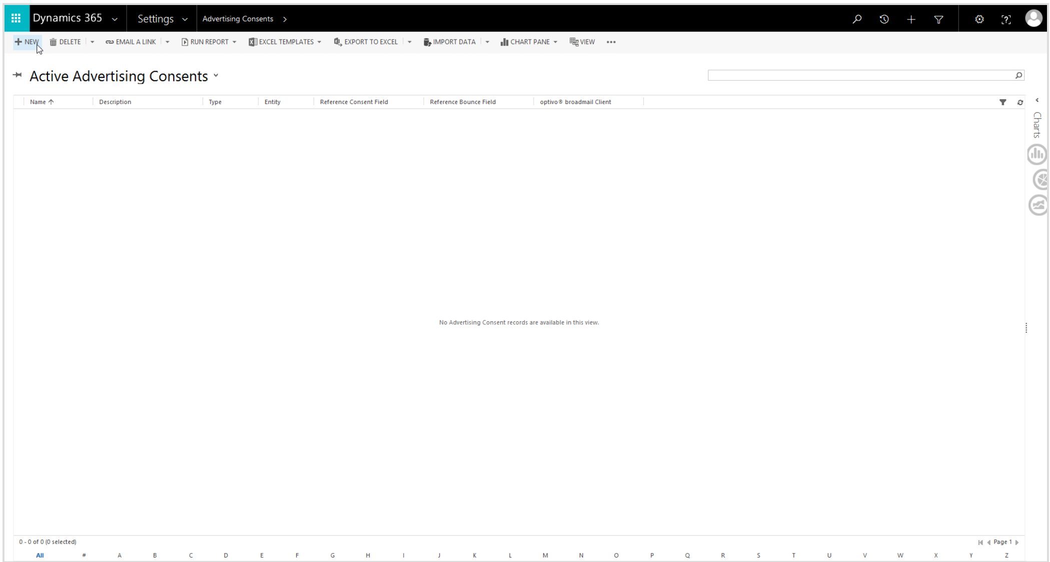
Create advertising consent and associate the fields

In the next step you must create an advertising consent and associate the field for presence of the advertising consent as well as the field for functionality of the advertising consent (bounce status). Perform the following steps:

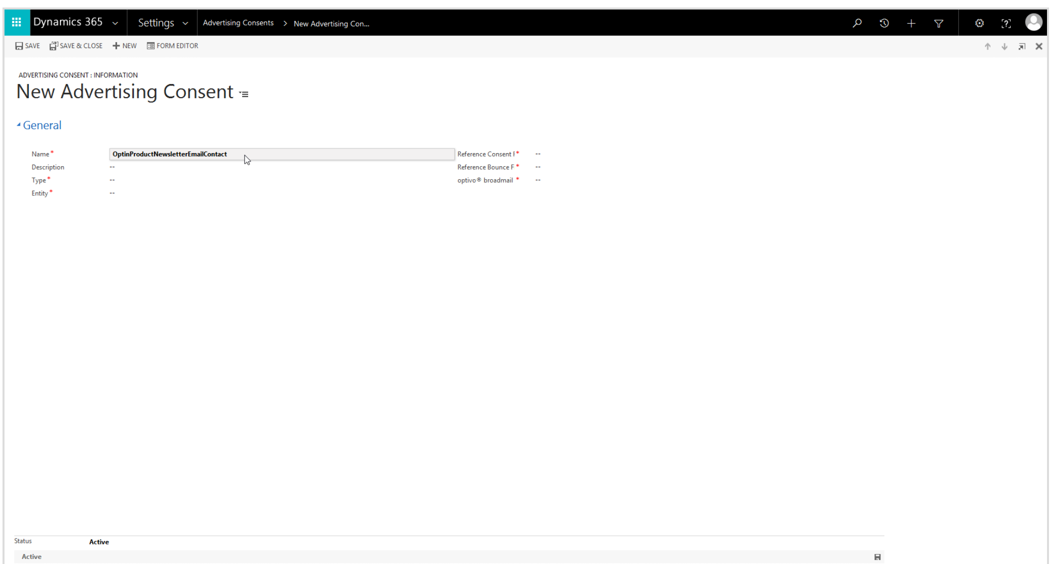
1. Open the settings and under the menu item **optivo® broadmail**, click **Advertising Consents**.



2. Click **New**.



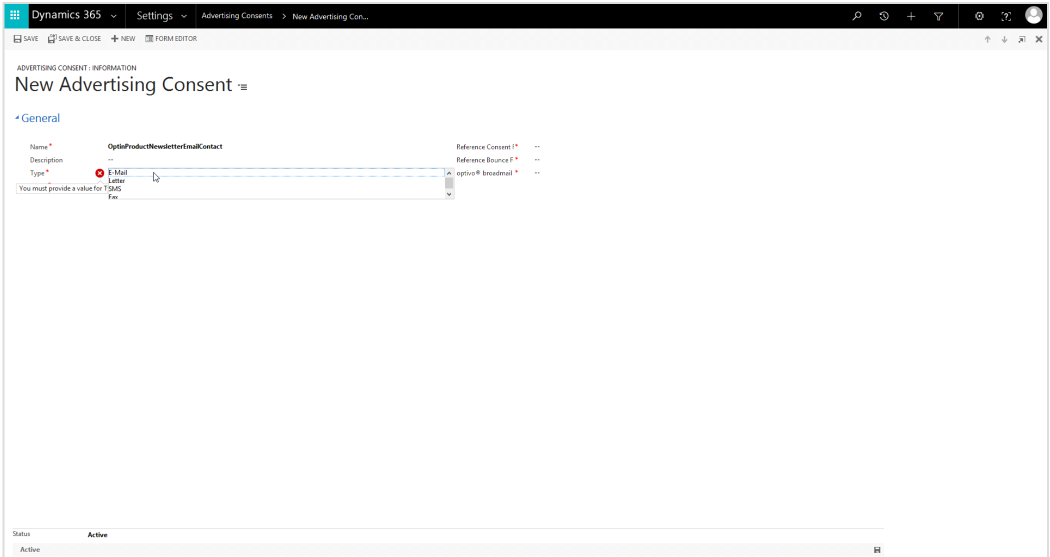
3. Under **Name**, enter a unique identifier.



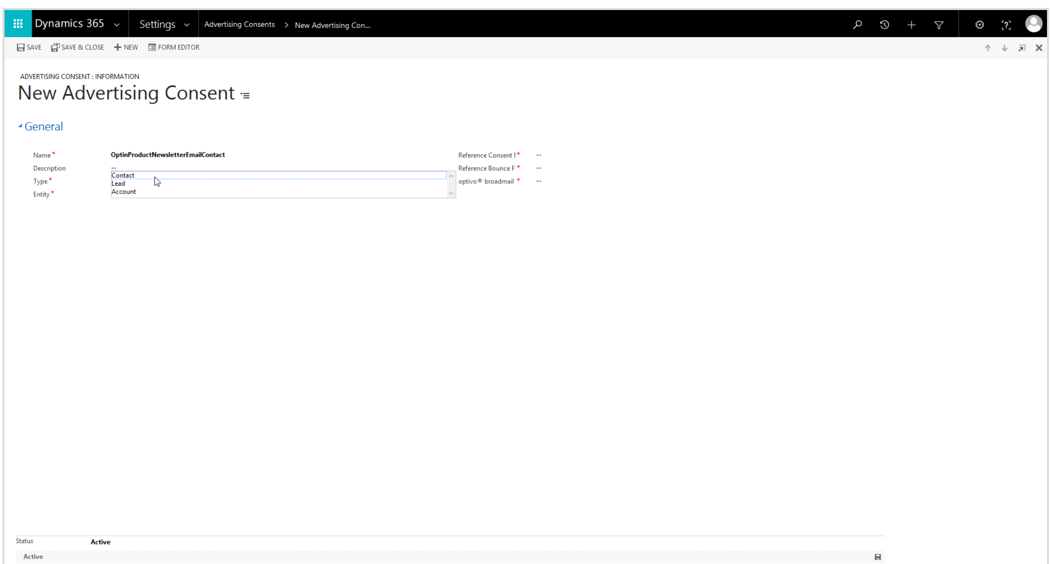
Do not use any special characters or characters with accents for the name. The name should be meaningful, such as **OptinProductNewsletterEmailContact**. This name will later be displayed for selecting the advertising consent when sending a campaign activity, among other things.

4. Under **Description**, enter a description for the advertising consent (optional, not required).

5. Under **Type**, select the communication channel (**email**, **fax**, or **SMS**) to which the advertising consent applies.

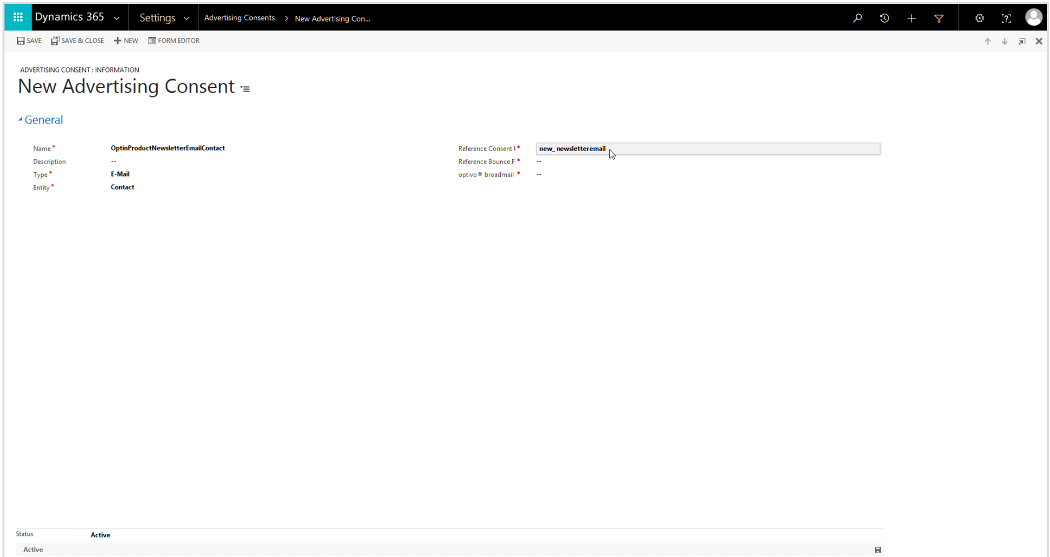


6. Under **Entity**, select the customer type (contact or lead) for which the advertising consent will be used.



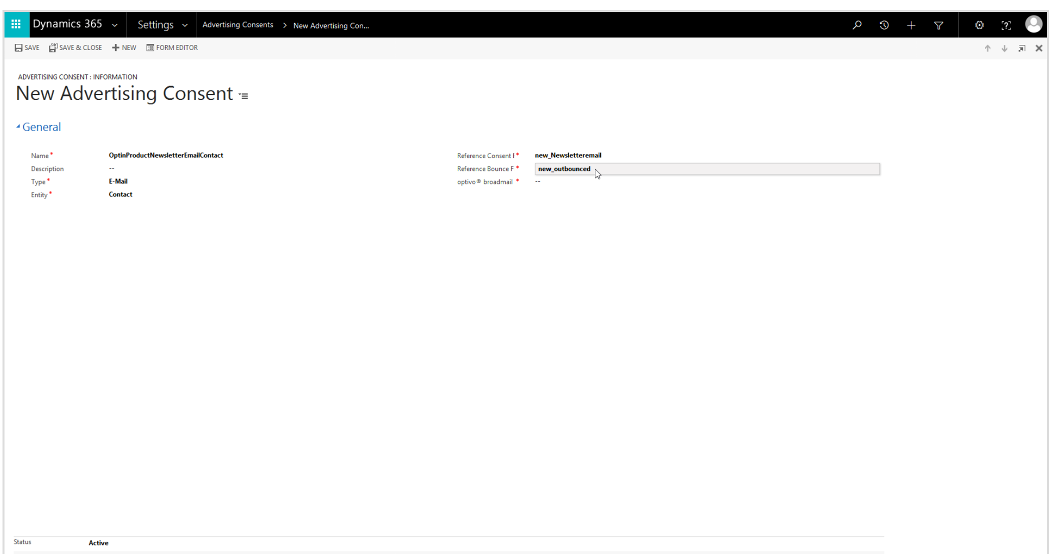
7. Under **Reference Consent Field**, enter the name of the field that indicates presence of the advertising consent.

Enter the name that automatically had the prefix **new_** added to it when creating the field (see section Field 1: Presence of advertising consent).



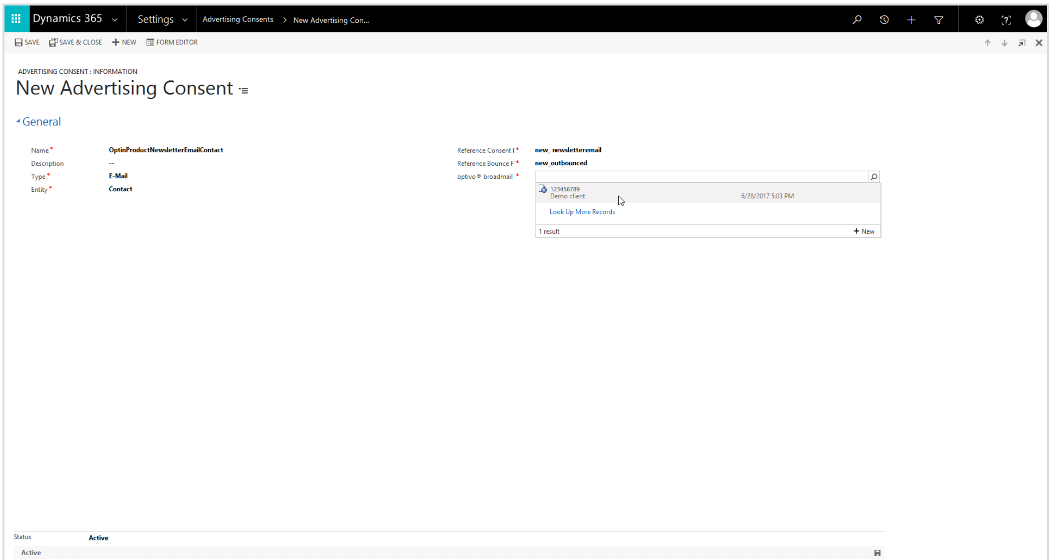
8. Under **Reference Bounce Field**, enter the name of the field that indicates the functionality of the advertising consent.

Enter the name that automatically had the prefix **new_** added to it when creating the field.

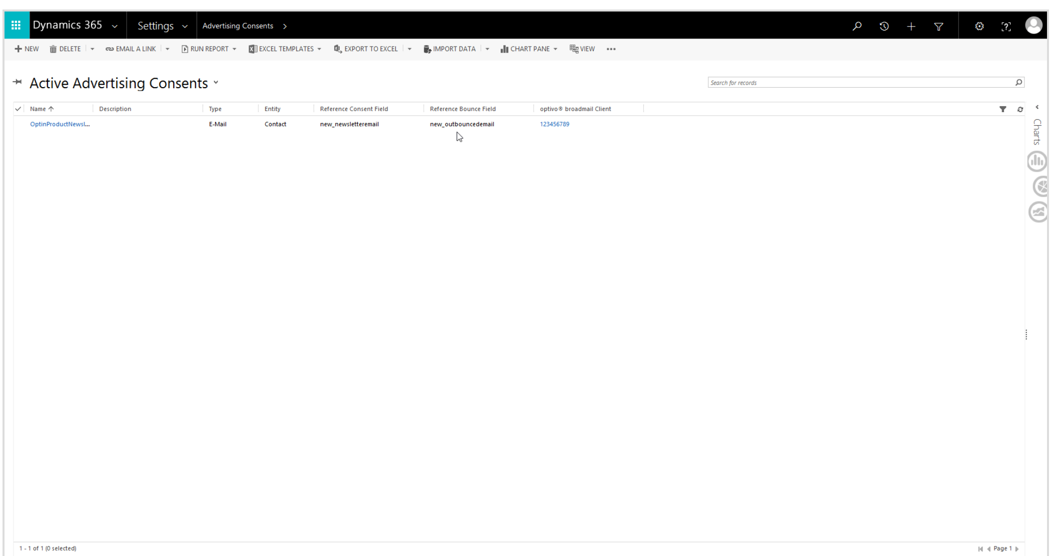


9. Under **optivo® broadmail**, select the client that will be used to send this advertising consent by clicking the magnifying glass symbol.

> **Note**: It is not possible to change the allocation of a client to an advertising consent at a later point.



10. Click **Save & Close**. You have successfully created a new advertising consent. The new advertising consent is displayed in the overview.



If you would like to add more advertising consents for the same channel, repeat steps 1–10. All additional advertising consents can refer back to the bounce status field that has already been created. This always applies to the entire channel, e.g. for the entire email channel.

Customize the campaign activity form

To complete the configuration, you must make any necessary changes to the campaign activity form and add the 13 fields from the Microsoft Dynamics Integration.

The 13 fields will usually have already been added to the campaign activity form when the integration was installed. However, depending on your exact CRM configuration, this step may have been missed during installation.

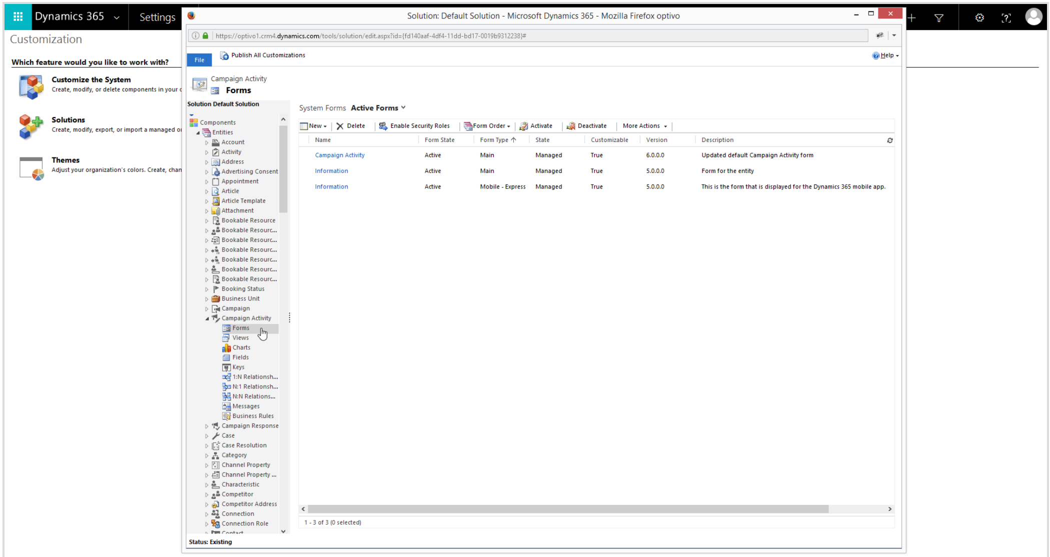
The integration has the following fields:

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
13	Advertising Consent

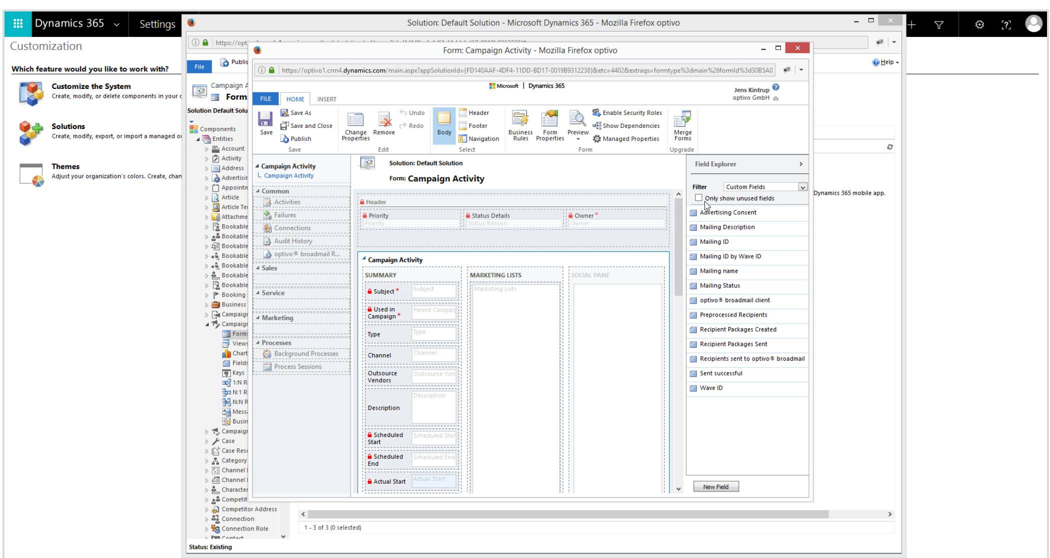
To add the fields, perform the following steps.

1. Open the settings and in the **Customization** menu, click **Customizations**.
2. Click **Customize the System**.

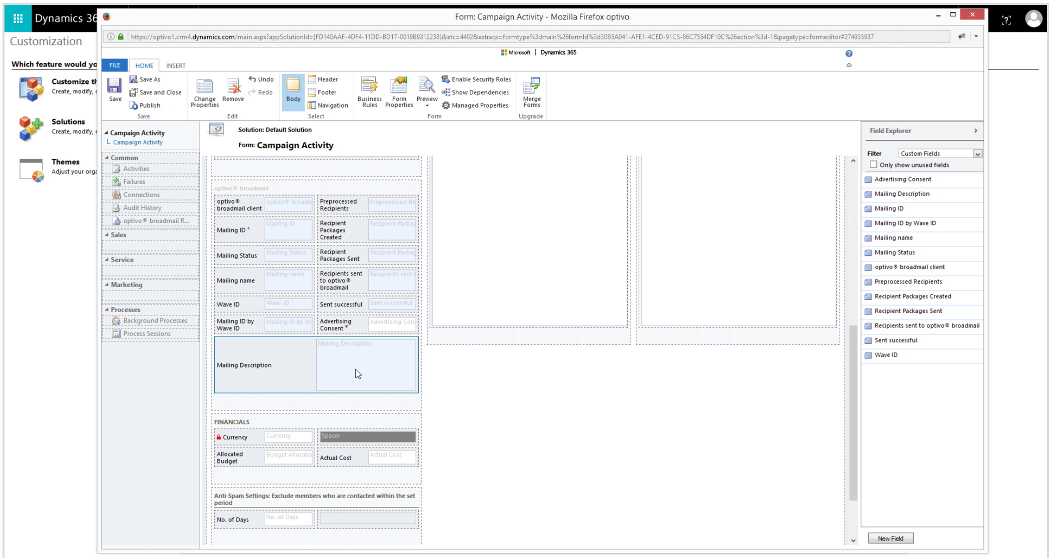
3. Use the side navigation on the left to navigate to **Components > Entities > Campaign Activity > Forms**.



4. Open the **Campaign Activity** form by clicking **Campaign activit**y in the list. A structure view of the selected form opens.
5. In the field explorer, select the option **Custom Fields** from the **Filter** select box 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**. You have successfully added the 13 fields from Microsoft Dynamics Integration to the campaign activity form.

Data fields transferred by default

The default settings for the integration will send the following data from Microsoft Dynamics to Episerver Campaign:

Data field	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)
fax	String	Fax number (required for fax campaigns)
email	String	Email (required for email campaigns)
street	String	Street
city	String	City

Data field	Date type	Description
state	String	State
zip	String	Zip code
country	String	Country

Configure additional fields for the recipient list

The configuration of additional fields applies to both campaign management and synchronization of recipient lists and all advertising consents (clients). Be aware of this during your planning in order to avoid costly reconfiguration and additional work later on.

The field configurations must be identical for both leads and contacts. If you make changes to just one type, then the other will fail to send.

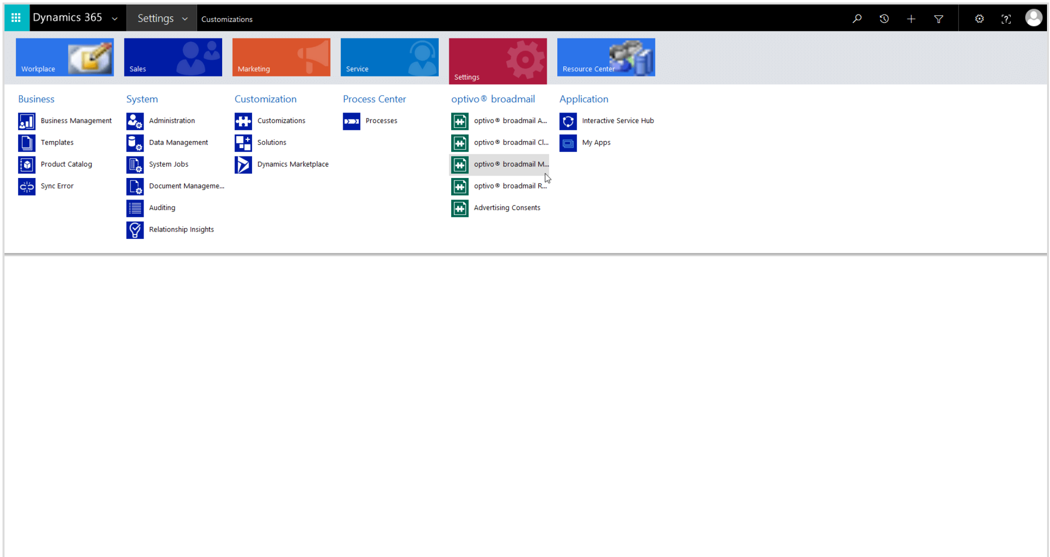
Two options are available for the custom configuration of your recipient list:

- You can remap a custom CRM field and write it to an existing standard field in your Episerver Campaign recipient list
- You can transfer a custom CRM field into an additional field in your Episerver Campaign recipient list that is not present in the standard configuration

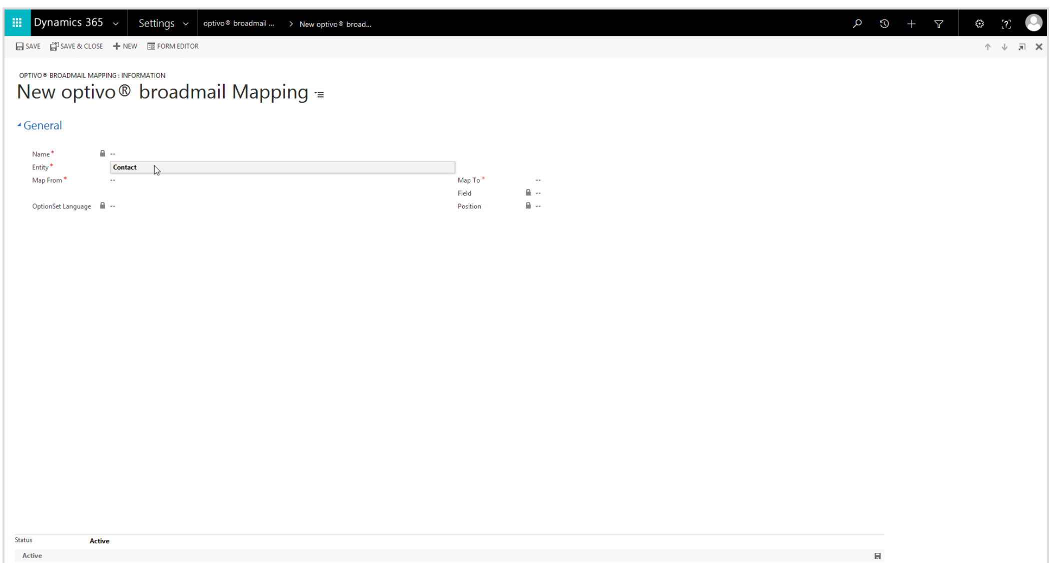
Remap CRM fields

To remap a custom CRM field and write it to an existing standard field in your Episerver Campaign recipient list, perform the following steps:

1. Open the settings and under **optivo® broadmail**, click the menu item **optivo® broadmail Mappings**.

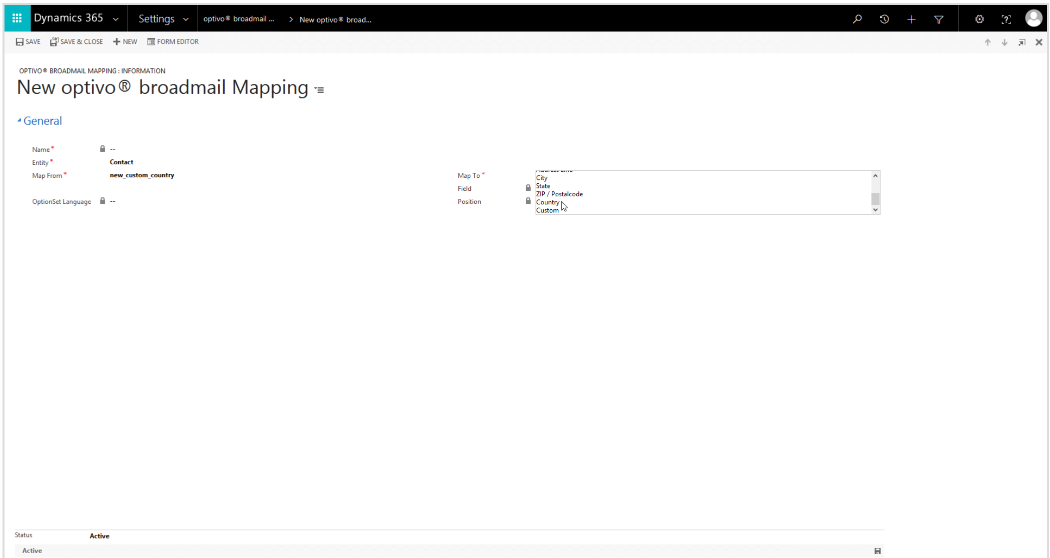


2. Click **New**.
3. Under **Entity**, select the type **Contact**.



4. In the **Map From** box, enter the name of the field in your CRM.
5. Under **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 have created a field called **new_custom_country**, then the value of this field can be copied into the **Country** field in the recipient list. The standard CRM **Country** field will no longer be transferred to Episerver Campaign.



6. Click **Save**.
7. Repeat steps 1-6 for type **Lead** (at step 3, choose **Lead** under **Entity**). You have successfully mapped a custom CRM field to a standard field in your recipient list.

Transfer CRM fields into an additional Episerver Campaign recipient list field

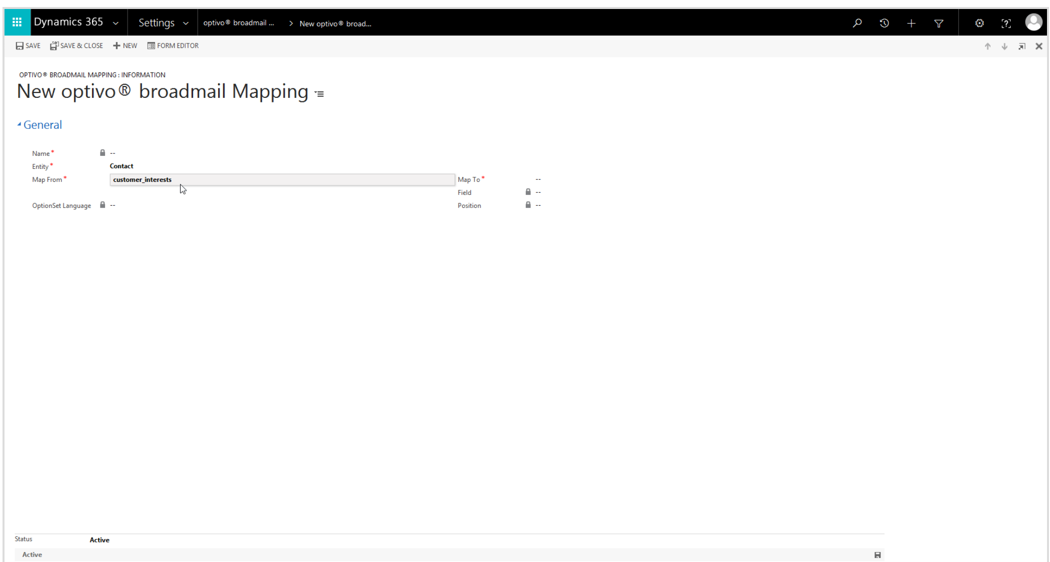
To transfer a custom CRM field into an additional field in your Episerver Campaign recipient list that is not present in the standard configuration, perform the following steps:

1. Contact the optivo customer support team to have the relevant additional fields added to your recipient lists.

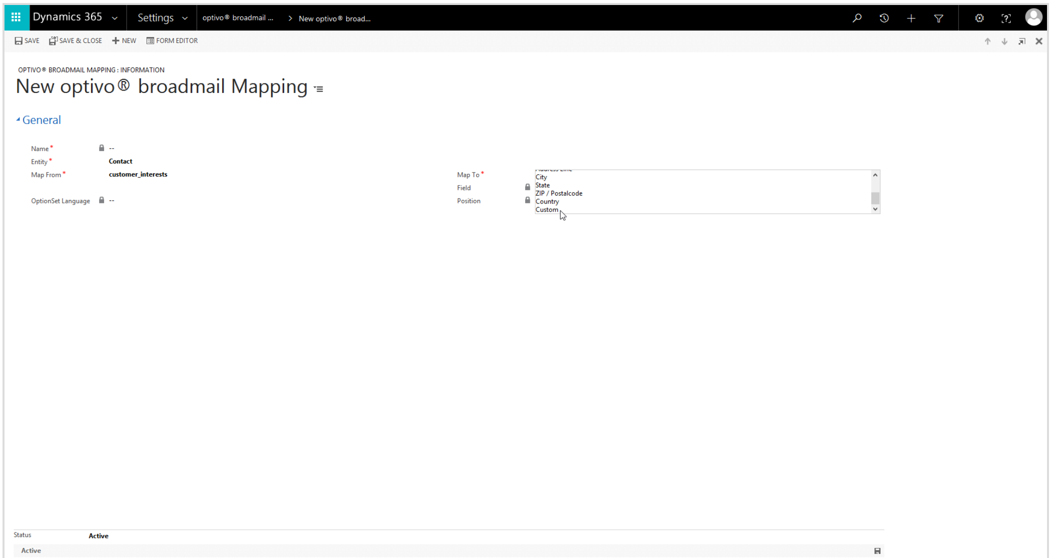
> **Note**: These must always be added to your recipient list by the optivo customer support team in advance. Transferring custom CRM fields into additional recipient list fields is only possible once the corresponding customization of your recipient lists has been done by our staff.

> When requesting new fields, provide these in a consecutively numbered list starting at 1. Inform the Episerver Support of your chosen numbering and field names. Make a permanent note of the chosen numbering and field names and do not change them. You will need this information for configuring Microsoft Dynamics.

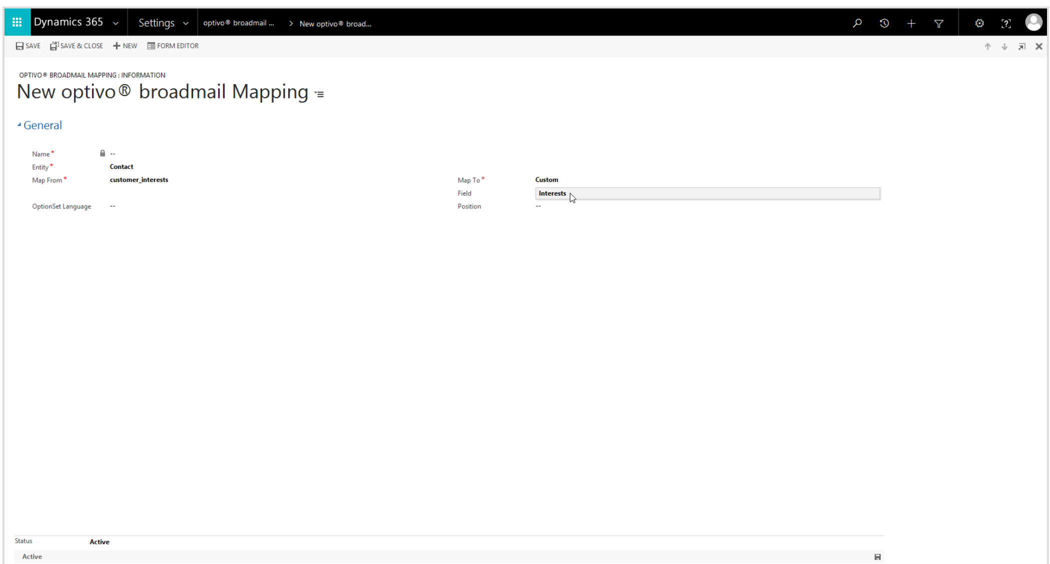
2. Once the optivo customer support team has added the desired additional fields to your recipient lists, go into your CRM settings and under **optivo® broadmail**, click the menu item **optivo® broadmail Mappings**.
3. Click **New**.
4. Under **Entity**, select **Contact**.
5. In the **Map From** box, enter the name of the CRM field.



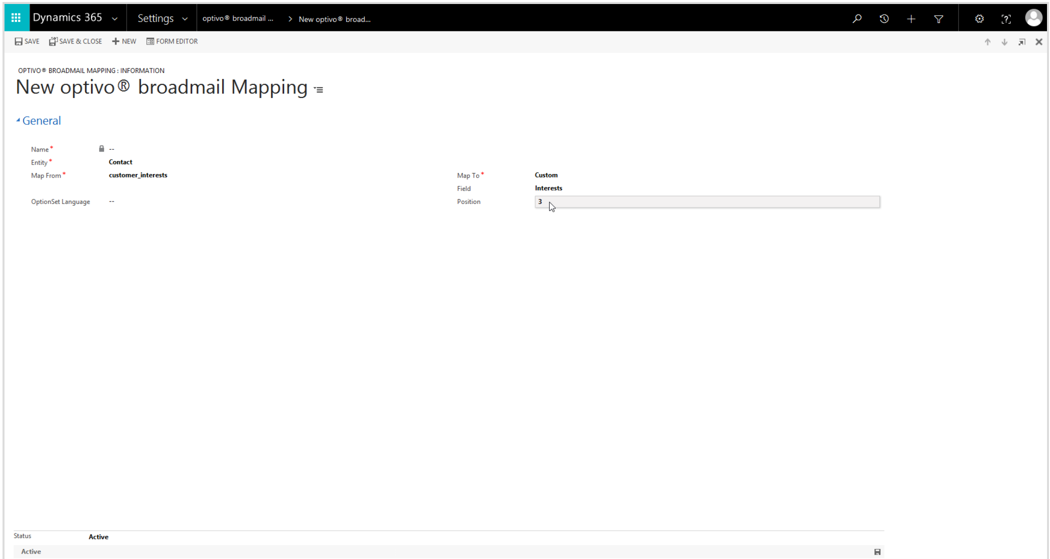
6. Under **Map To**, select the option **Custom**.



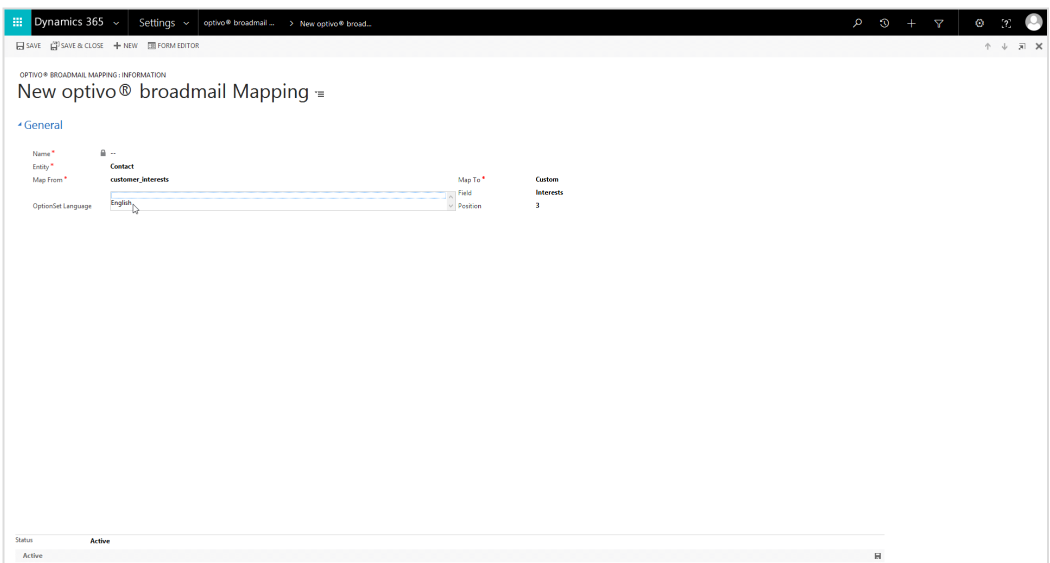
7. In the **Field** box, enter the name of the additional recipient list field requested.



8. In the **Position** box, enter the position number of the additional recipient list field. The position number corresponds to the field numbers you chose when the additional recipient list fields were added.



9. If the additional recipient list field is a drop-down list/option set, then use **OptionSet Language** to choose which language should be used to transfer the values.



10. Click **Save**.
11. Repeat steps 2-10 for type **Lead** (at step 4, choose **Lead** under **Entity**). You have successfully mapped a custom CRM field to an additional field in your recipient list.

Send mailings

The integration allows you to send campaign mailings in Episerver Campaign directly from your Microsoft Dynamics CRM using Campaign Activity in your CRM. After the mailing has been sent, response data from recipients (opens, clicks, direct replies, unsubscribes and outbounces, see Response data) is automatically imported into your CRM from Episerver Campaign.

Requirements

- You have completed the configuration of the integration (see Configuration)
- You have prepared the campaign mailing in Episerver Campaign

  > If you are using the closed-loop interface, add the wait node to your Episerver Campaign Smart Campaign and choose the option Wait until import is completed so that mailings are only sent once the import of recipients is complete.

- You know the ID of the campaign mailing to be sent

  > Don't forget to make a note of the Episerver Campaign campaign mailing ID. The ID will be required to send the mailing using the CRM campaign.

Once you have fulfilled all the requirements, you can start with item Configure marketing lists and CRM campaign.

If you have not yet fulfilled all the requirements, then complete the configuration of the integration in your CRM and prepare the campaign mailing in Episerver Campaign.

Configuring marketing lists and CRM campaigns

Before sending a campaign mailing via Episerver Campaign, you must do the following in Microsoft Dynamics:

- create a marketing list with the leads and contacts who will receive the mailing

  > **Note**: Contacts and leads for which you do not hold an advertising consent will not receive your mailing, even if these people are added to your marketing list.

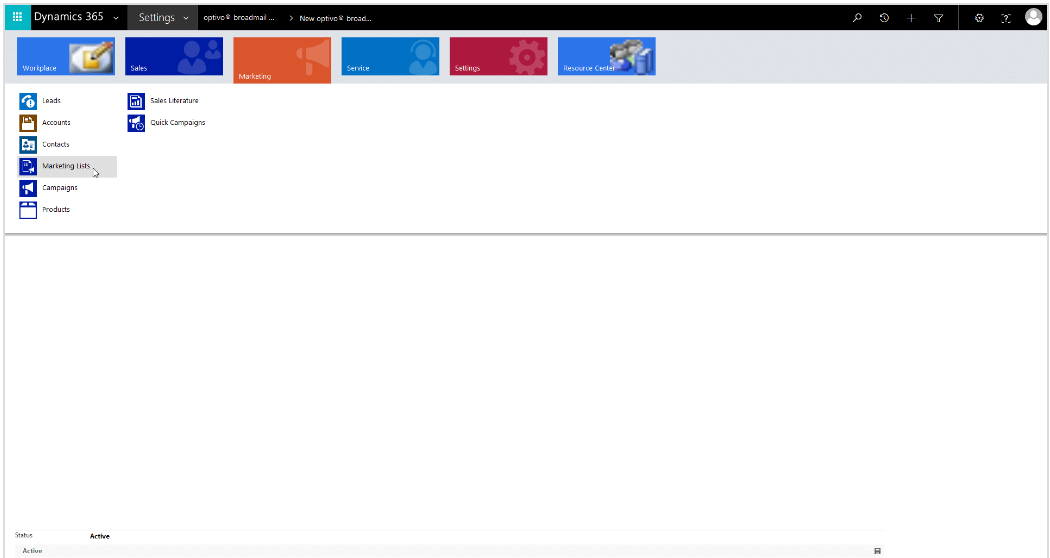
- set up a CRM campaign and add the marketing list

  > Using the CRM campaign and a campaign activity allows you to control the mailing dispatch via Episerver Campaign.

To configure a marketing list and a CRM campaign, perform the following steps:

Creating a marketing list

1. Switch to area **Marketing > Marketing Lists**.

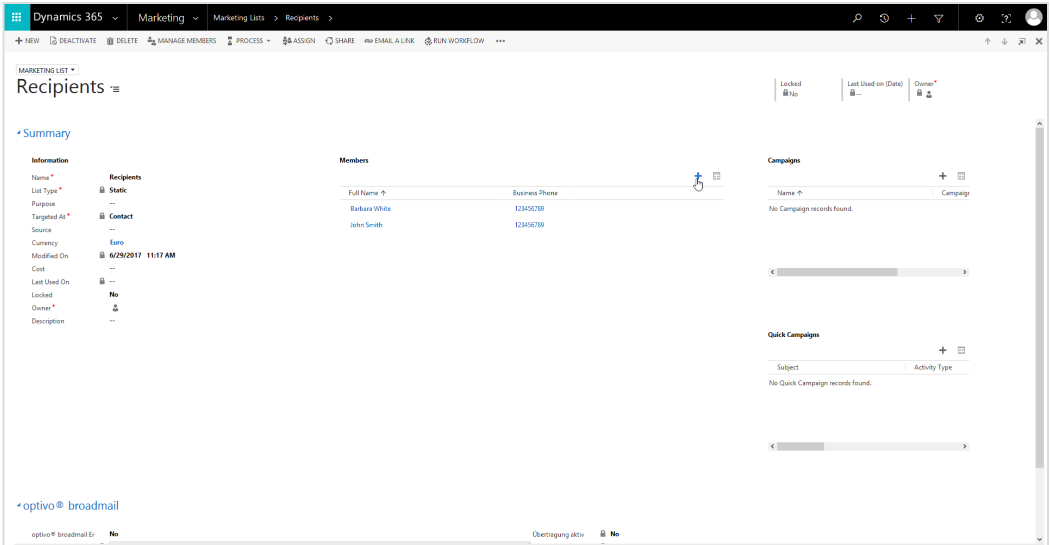


2. Click **New** to create a marketing list.

> The Microsoft Dynamics Integration from Episerver Campaign supports both static and dynamic list types.

> You can freely choose a name for the marketing list. When creating marketing lists, the individual options (e.g. **Currency**, and so on.) can also be freely chosen. This information is not relevant for sending mailings via Episerver Campaign.

3. When you have finished entering the information, click the disc symbol in the bottom right. Once saved, a plus symbol appears below **Members** for adding more.
4. Add contacts or leads to the marketing list to which you wish to send the mailing by clicking the plus symbol below **Members** and selecting the relevant person.

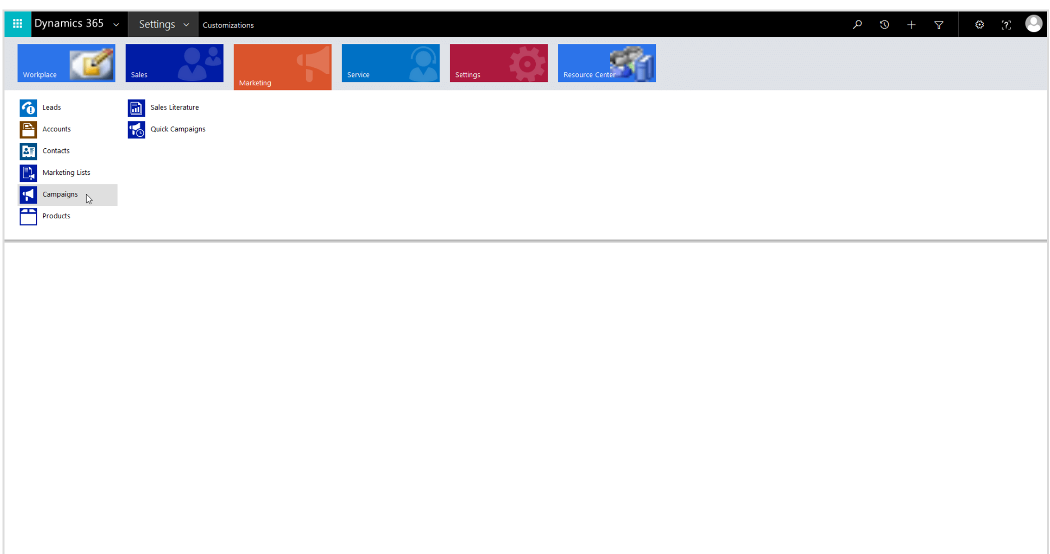


5. When you have finished entering the information, click the disc symbol in the bottom right. You have successfully created a new marketing list for sending mailings to a selected customer segment using Episerver Campaign.

Creating a CRM campaign and adding the marketing list

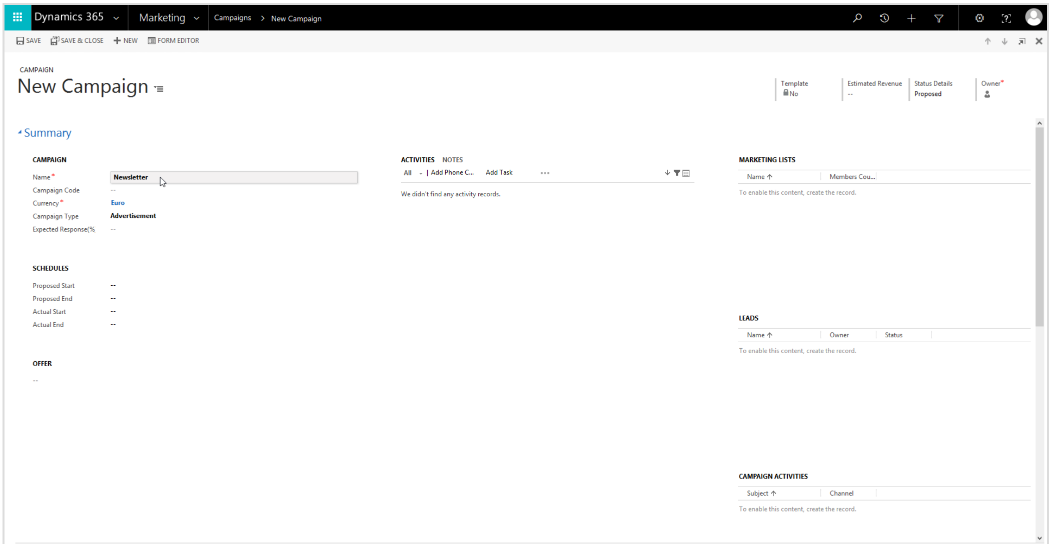
Once you have created at least one marketing list, create a new campaign in Microsoft Dynamics and add the created marketing list to it. Perform the following steps:

1. Switch to **Marketing > Campaigns**.

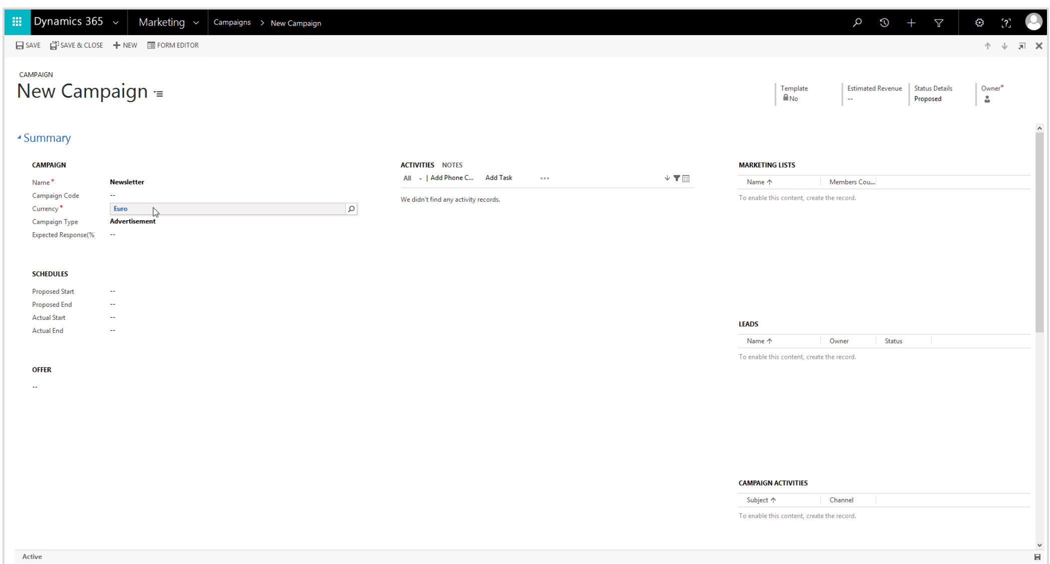


2. Click **New**.

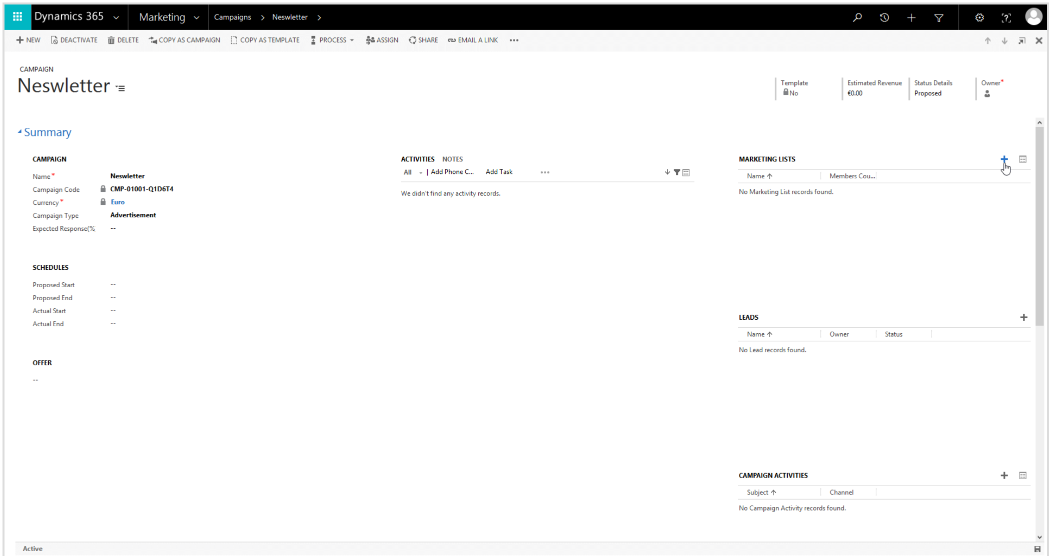
3. Enter a name for your campaign in the **Name** box. The name can be chosen freely.



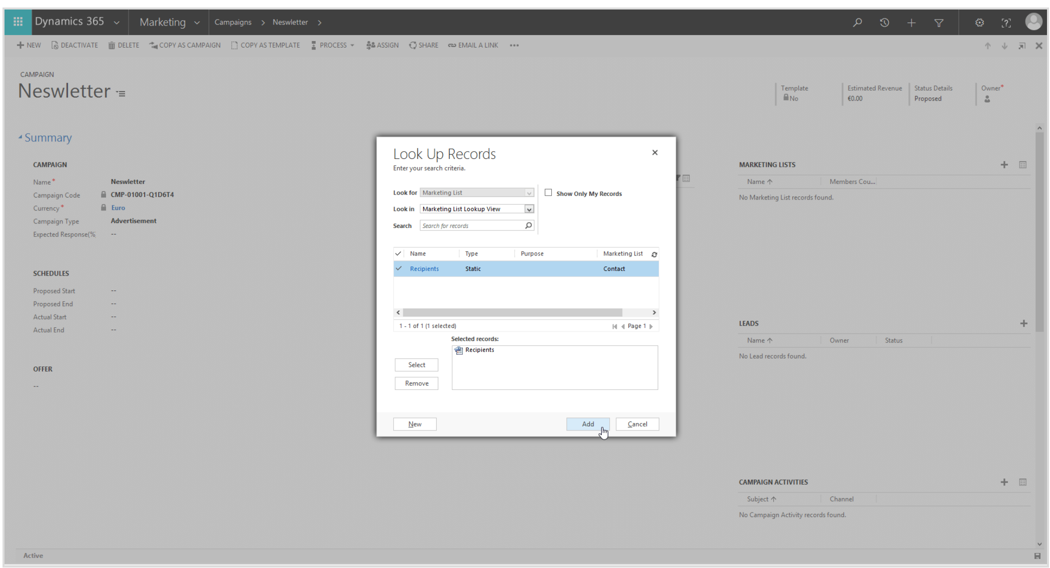
4. In the **Currency** box, specify a currency for the campaign. The currency can be chosen freely.



5. Click **Save** or, alternatively, click the disc symbol at the bottom right. In the **Marketing Lists** area, a plus symbol for adding marketing lists appears.



6. Click the plus symbol in the **Marketing Lists** area and add the relevant marketing list to your campaign by highlighting the marketing list and clicking **Select** and **Add**.

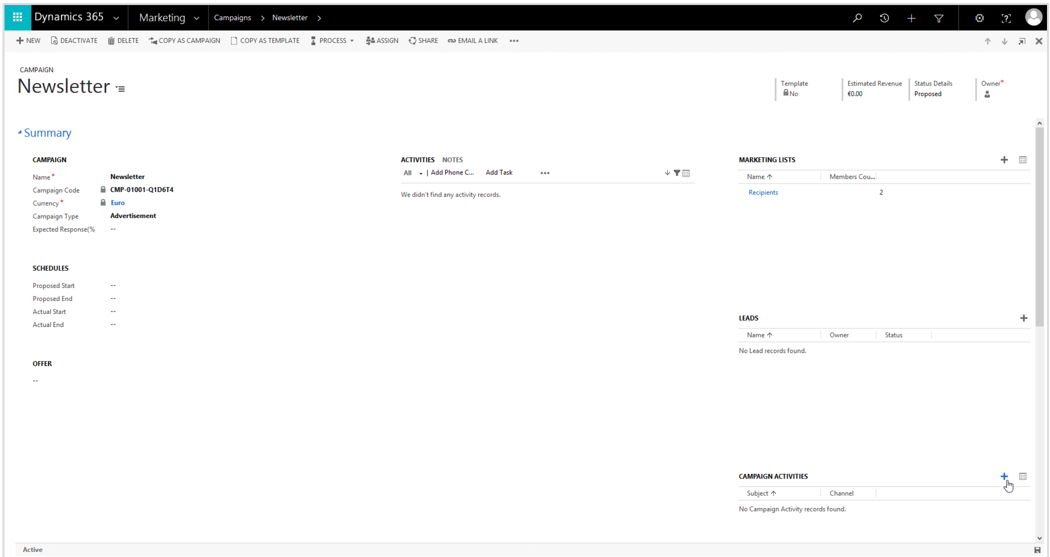


7. Click **Save** or, alternatively, click the disc symbol at the bottom right. You have successfully created a new CRM campaign and added a marketing list to it. Do not close the window, as you will need it for the next step.

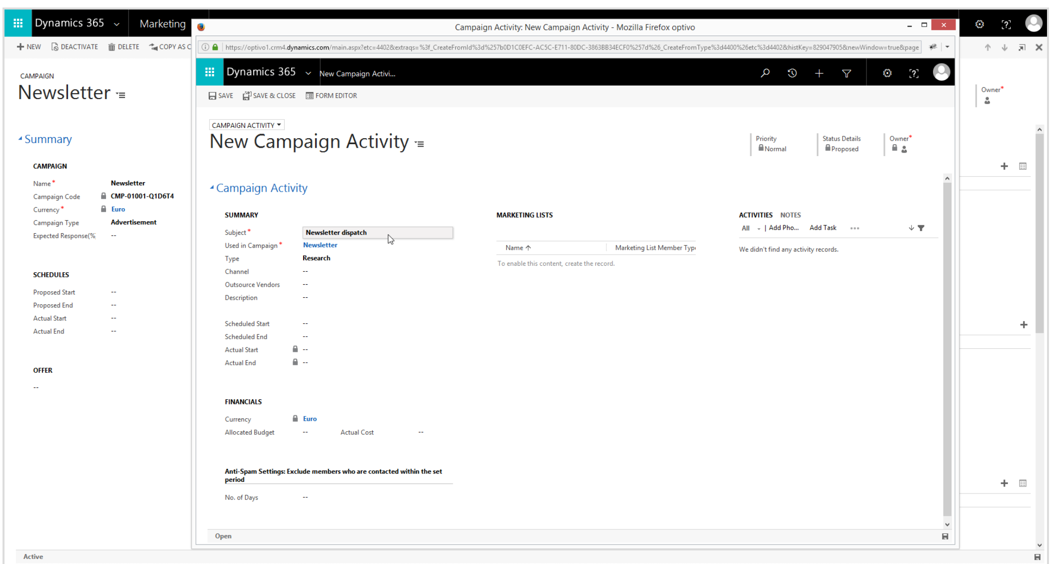
Preparing the campaign activity for dispatch

The next step is to create a new campaign activity for sending mailings via Episerver Campaign. Perform the following steps:

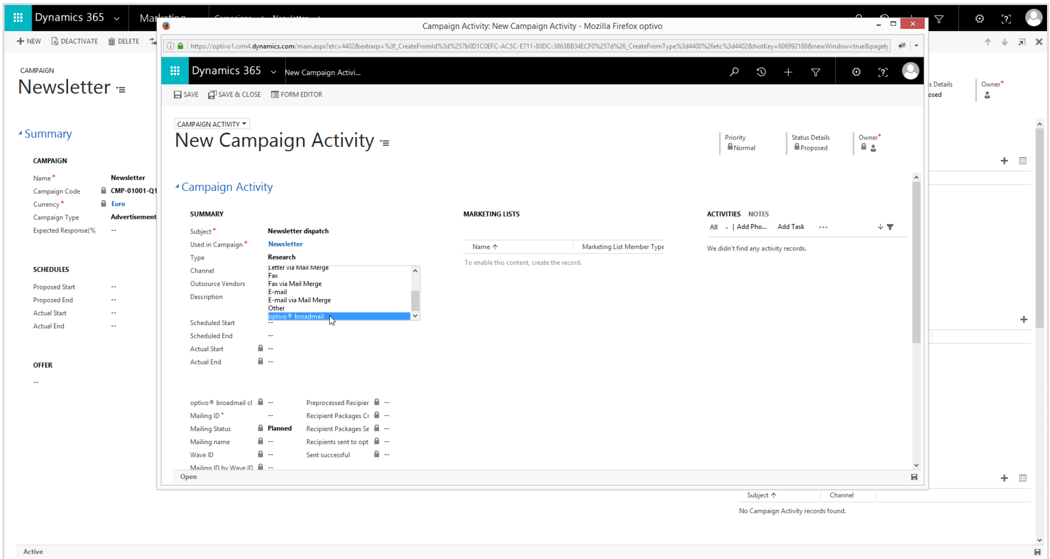
1. In the **Campaign Activities** area, click the plus symbol.



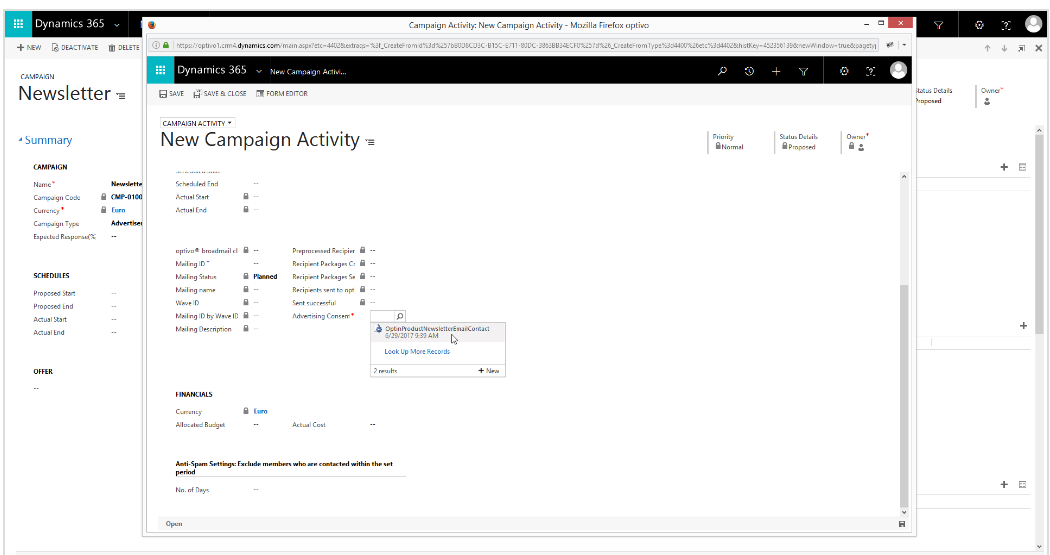
2. In the **Subject** box, enter a subject for your campaign activity. The subject can be chosen freely.



3. Under **Channel**, select the option **optivo® broadmail**. A new options area appears.

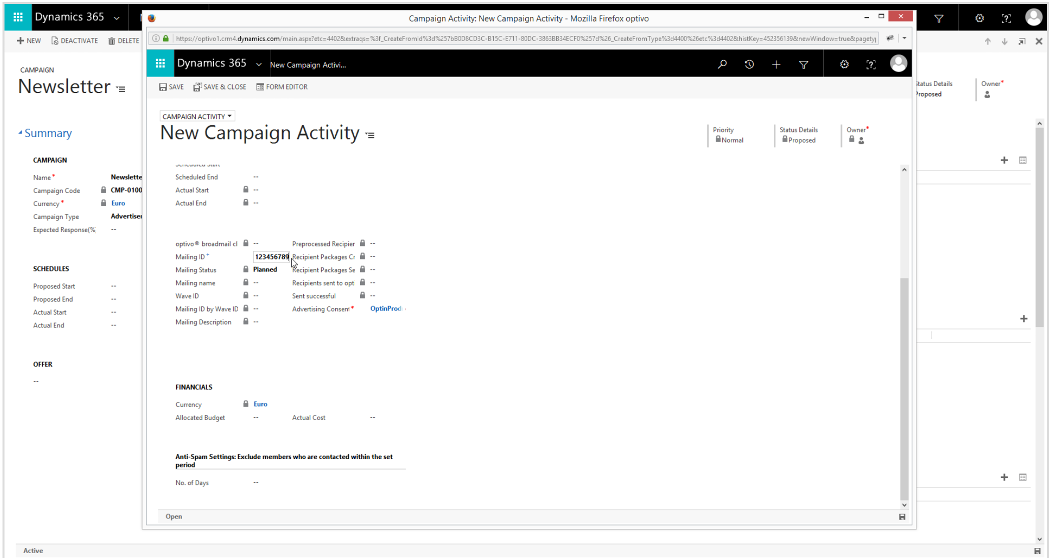


4. In the new options area, click the magnifying glass under **Advertising Consent** and select the corresponding advertising consent.



5. In the **Mailing ID** box, enter the ID of the mailing that is to be sent.

> **Note**: The mailing must be located in the Episerver Campaign client to which the advertising consent has been assigned.



> If you do not know the mailing ID, you can find this in Episerver Campaign. In Episerver Campaign, switch to the message that you would like to send and locate the ID in the overview. Do not confuse the campaign ID with the mailing ID in Episerver Campaign. The mailing ID must always be used in the CRM.

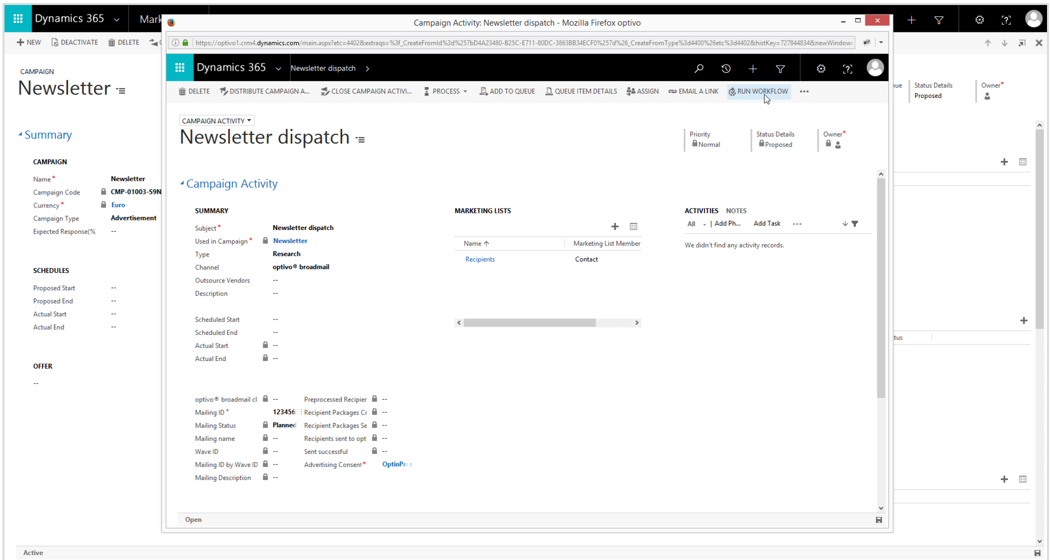
6. Click **Save** or, alternatively, click the disc symbol at the bottom right. You have successfully added a new campaign activity to your campaign. The **Run Workflow** button appears above the form.

Starting and monitoring the workflow for dispatch

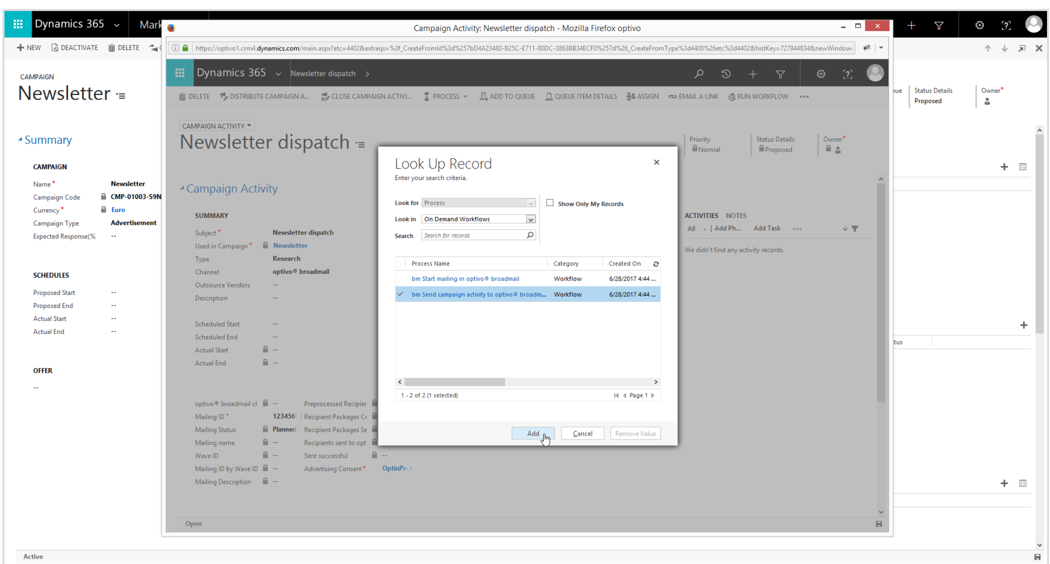
Starting the workflow

In the next step you must start the workflow for dispatch. To do this, perform the following steps:

1. On the campaign activity screen, click **Run Workflow**. The **Look Up Record** window opens.



2. Select the workflow **bm Send campaign activity to optivo broadmail** and click **Add** to start the workflow.



Do not start the workflow **bm Start mailing in optivo broadmail**. This will be automatically called by the integration.

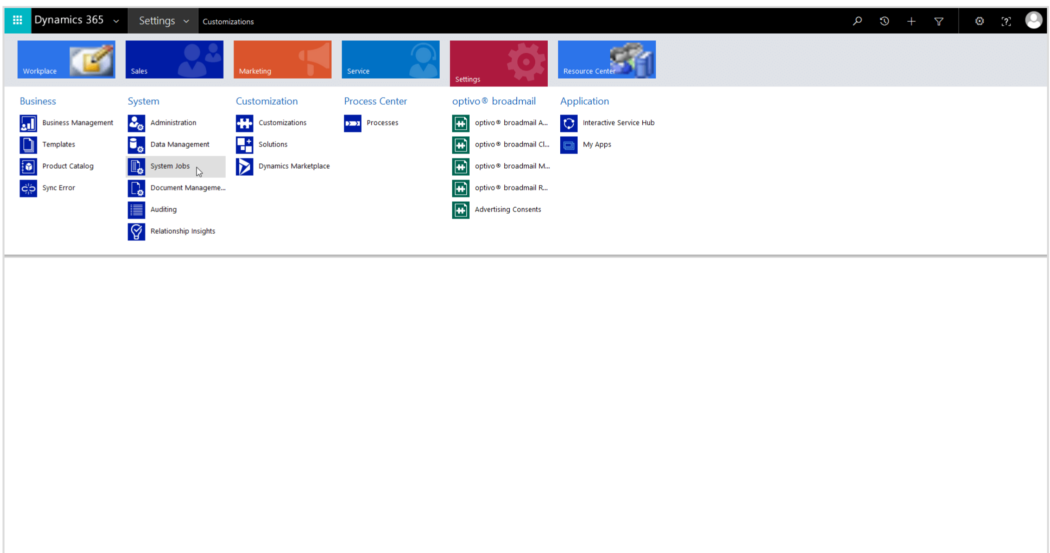
You have successfully started the workflow for dispatch. The contacts and leads from the marketing list are transferred to Episerver Campaign via the interface in packages known as *Recipient packages*. The **Mailing status** display changes from **Planned** to **Transferring**.

> **Note**: The transfer of recipient packages may take up to an hour.

Monitoring the workflow

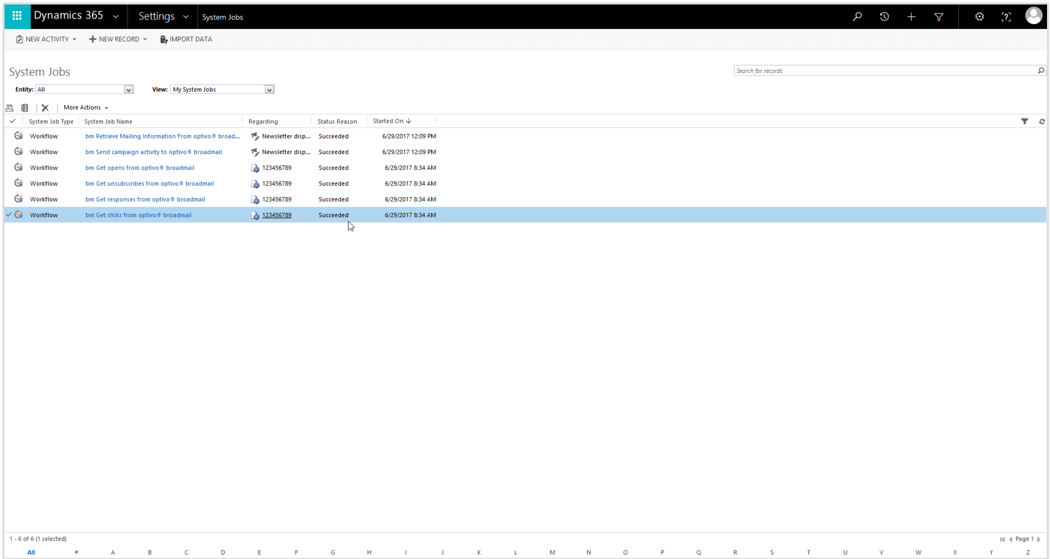
You can monitor the activity of the workflow. To do this, perform the following steps:

1. In your Microsoft Dynamics CRM, open settings and select **System Jobs**. The **System Jobs** window opens.



2. Use the drop-down list under **View** to switch to the **My System Jobs** view, where you can see the current status of the workflow under **Status Reason**.

> If an error is displayed under **Status Reason**, then click the corresponding workflow to see more information about the error.



Copy marketing lists

With the integration of Microsoft Dynamics you can copy contacts and leads from a marketing list into an Episerver Campaign recipient list. The process can be run on a daily or weekly basis. For example, you could automatically add your new leads and contacts to a marketing automation campaign and automatically send welcome mailings, birthday mailings and much more in Episerver Campaign.

The copying process is a one-way operation from the CRM to Episerver Campaign. Data cannot be sent the other way (e.g. if changes are made to the dataset in Episerver Campaign). Unsubscribes and outbounces are not affected by this limitation and are updated back to the CRM.

> The format for the recipient list is the same as used for the previously described campaign management. If you require additional fields in your Episerver Campaign recipient list in order to export the marketing list, then contact Episerver Support before configuring marketing list synchronization.

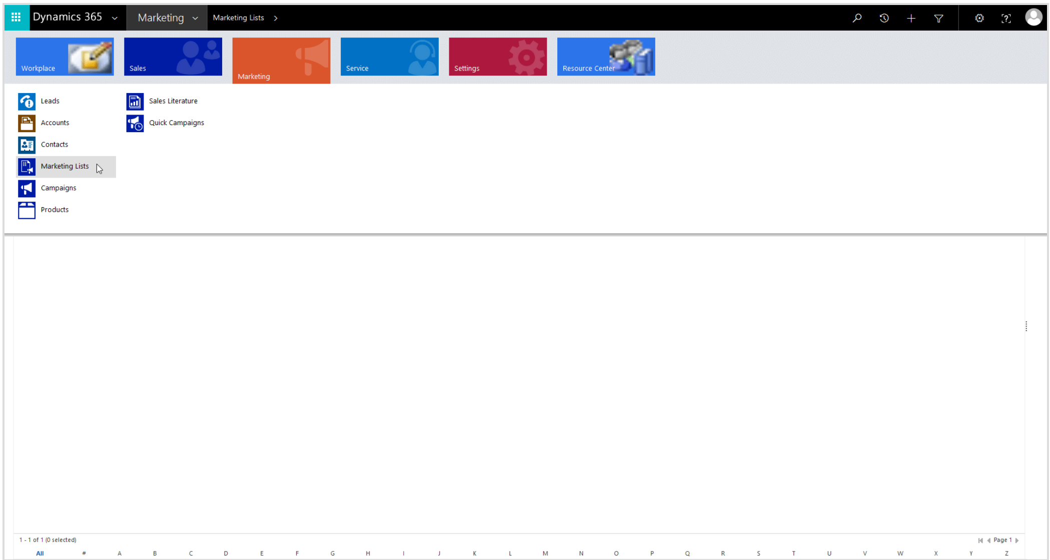
To copy marketing lists into recipient lists, you must do the following:

- first, contact Episerver Support to configure or create a corresponding recipient list in the relevant client
- configure the marketing list for the copying process
- start the workflow for the automatic copying process

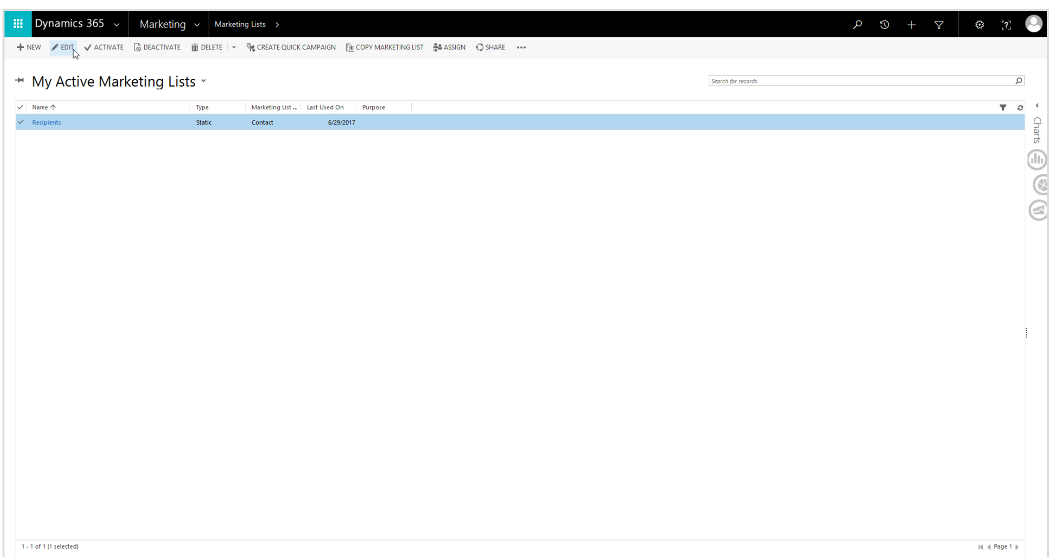
Configuring the marketing list for the copying process

Once Episerver Support has configured your recipient lists, perform the following steps:

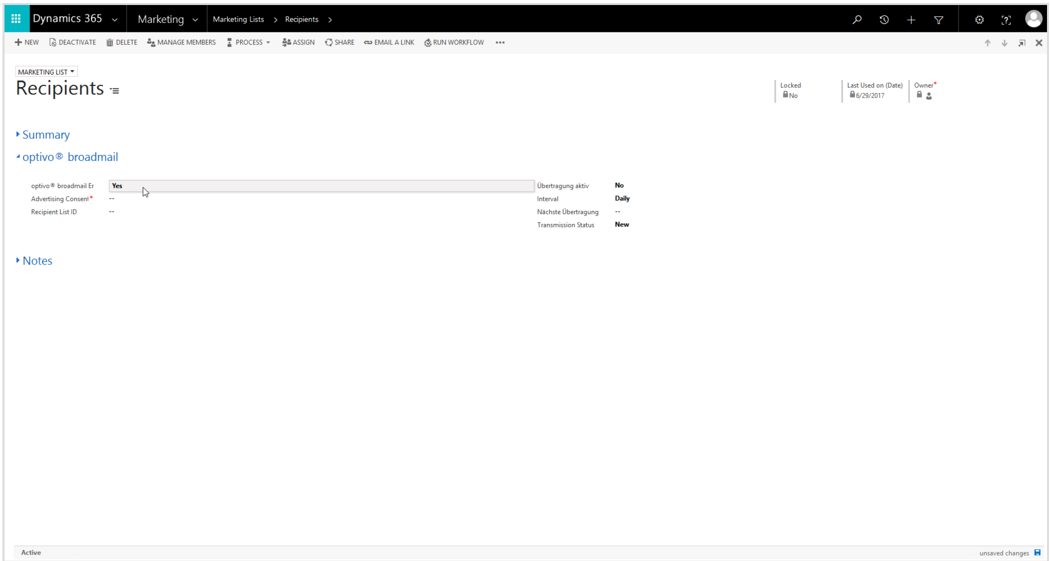
1. Switch to the **Marketing** area and click **Marketing Lists**.



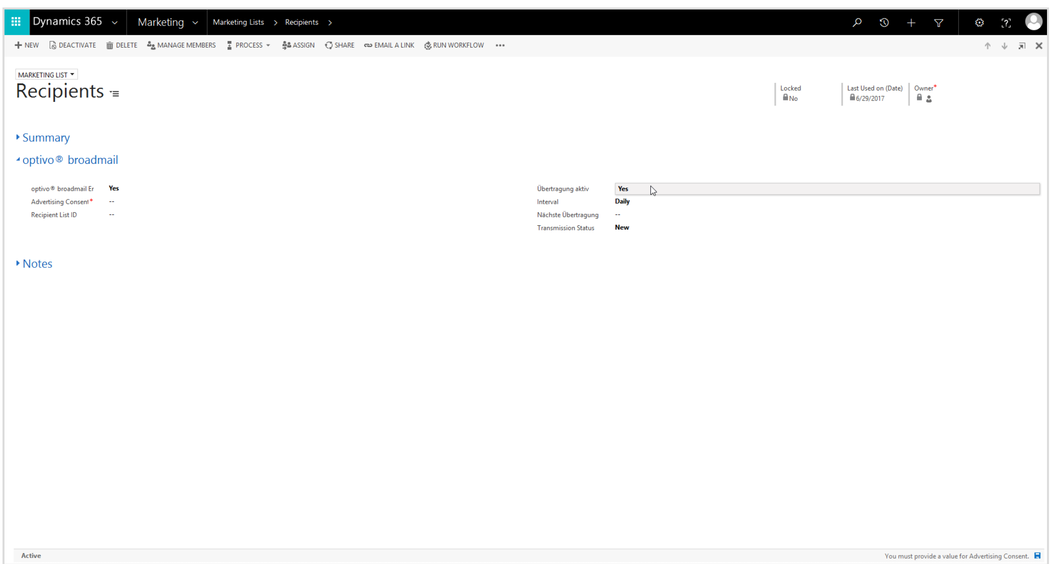
2. Select the marketing list that you would like to synchronize with an Episerver Campaign recipient list and click **Edit**.



3. Set the value of the field next to **optivo broadmail recipient list** to **Yes** by clicking it.



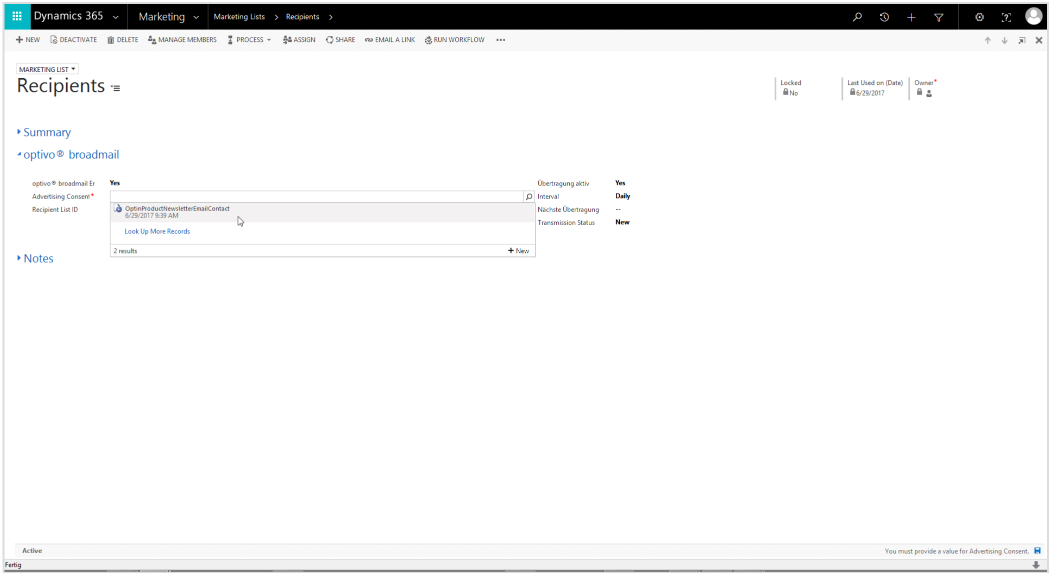
4. Set the value of the field next to **Transmission active** to **Yes** by clicking it.



Do not forget to the set the **Transmission active** field to **Yes**. If this value is not set to **Yes**, then the copying process will not start. You can set this value to **No** at a later time to disable the copying process without losing the configuration.

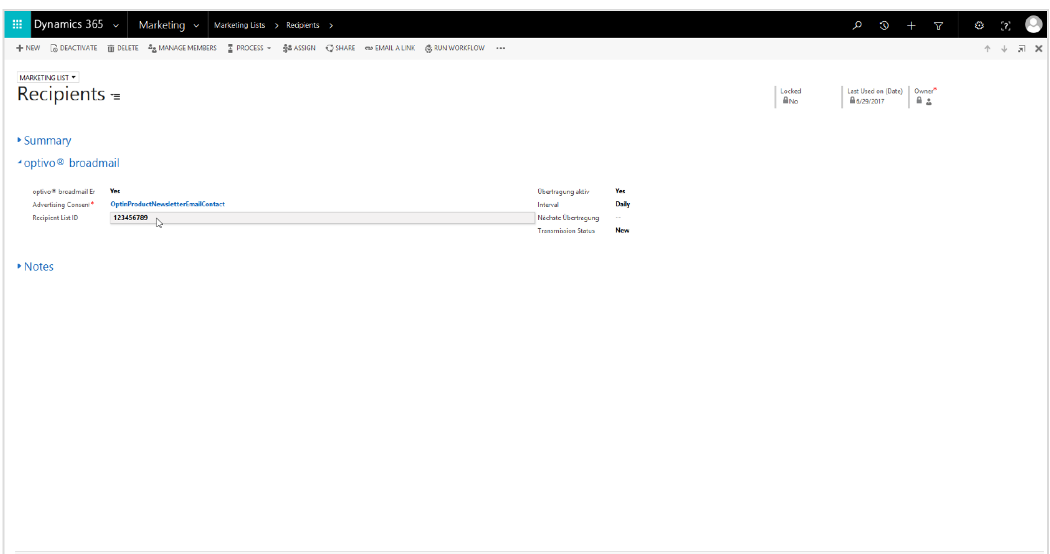
5. Under **Advertising Consent**, select the marketing permission that should be used as a criterion when selecting the contacts and leads to be transferred. Click the magnifying glass symbol in

the field and then click the relevant marketing permission.

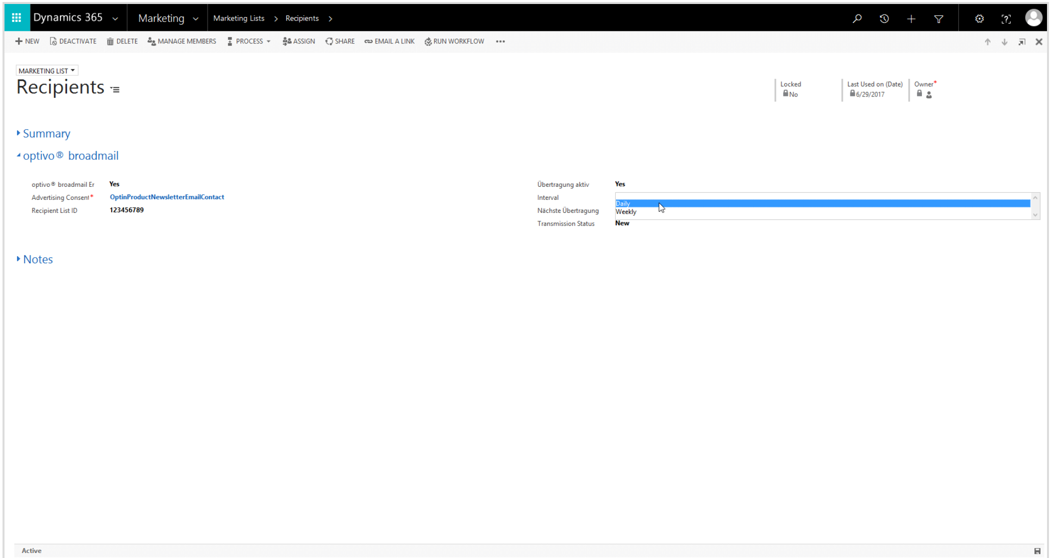


6. In the **Recipient List ID** box, enter the ID of the Episerver Campaign recipient list into which the marketing list is to be copied.

> To view your recipient list IDs, open the Episerver Campaign start menu and in the **Administration** menu, click **API overview**. Switch to the **Recipient lists** tab. The required recipient list ID can then be found in the overview.



7. Under **Interval**, choose whether the copying process should take place daily or weekly by clicking in the field and selecting the corresponding entry.

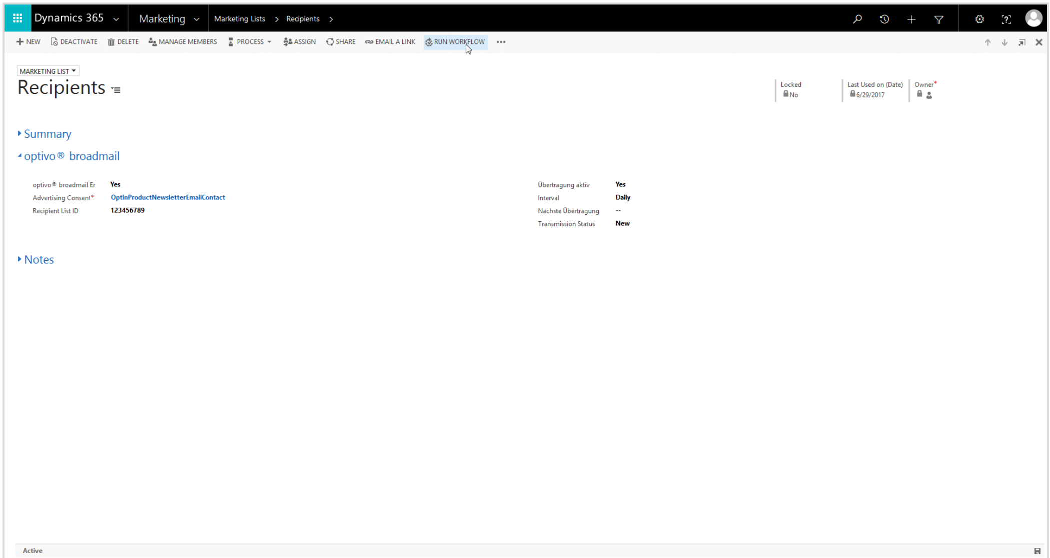


8. Once you have chosen all your settings, save the changes by clicking the disc symbol in the bottom right. You have successfully configured the marketing list for copying into an Episerver Campaign recipient list. The **Transmission Status** field will later show **Running** if it is running successfully. If there is an error with the copying process, then the transfer status will show **Error**. If this happens, check the error message for the workflow (see section Maintenance and Troubleshooting).

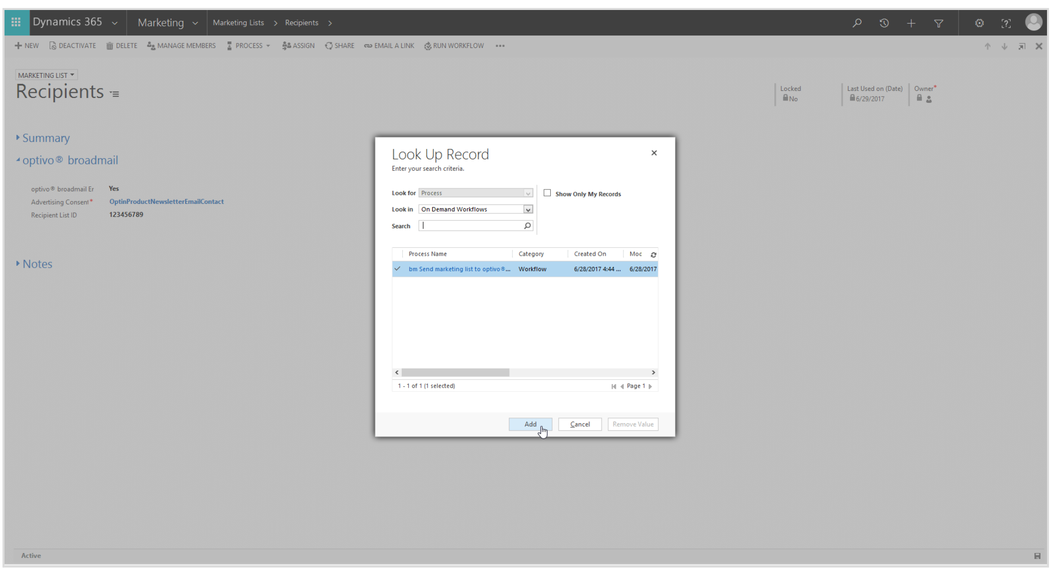
Starting and monitoring the marketing list copying process

After configuration of the marketing list you must start the automatic copying process workflow **bm Send marketing list to optivo broadmail**. Perform the following steps:

1. On the marketing list screen, click **Run Workflow**. The **Look Up Record** window opens. The workflow **bm Send marketing list to optivo broadmail** is shown.



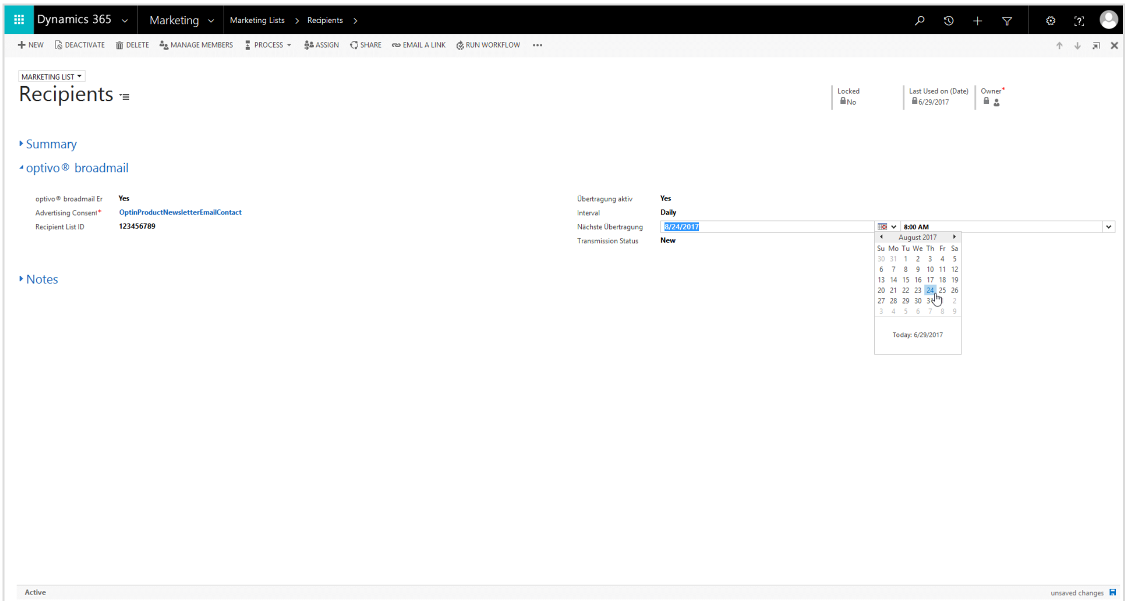
2. Click **Add**.



You have successfully started the workflow for automatically copying the marketing list to an Episerver Campaign recipient list.

You can view the current status of the workflow at any time under **Settings > System > System Jobs**.

Please note: If the workflow fails, then the time under **Next Transmission** will be 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 under **Next Transmission** and select the date and time.



Response data

Alongside the dispatch of campaign messages and copying marketing lists, Microsoft Dynamics CRM Integration feeds recipient response data back to the CRM.

> Response data is accessed once every hour by default.

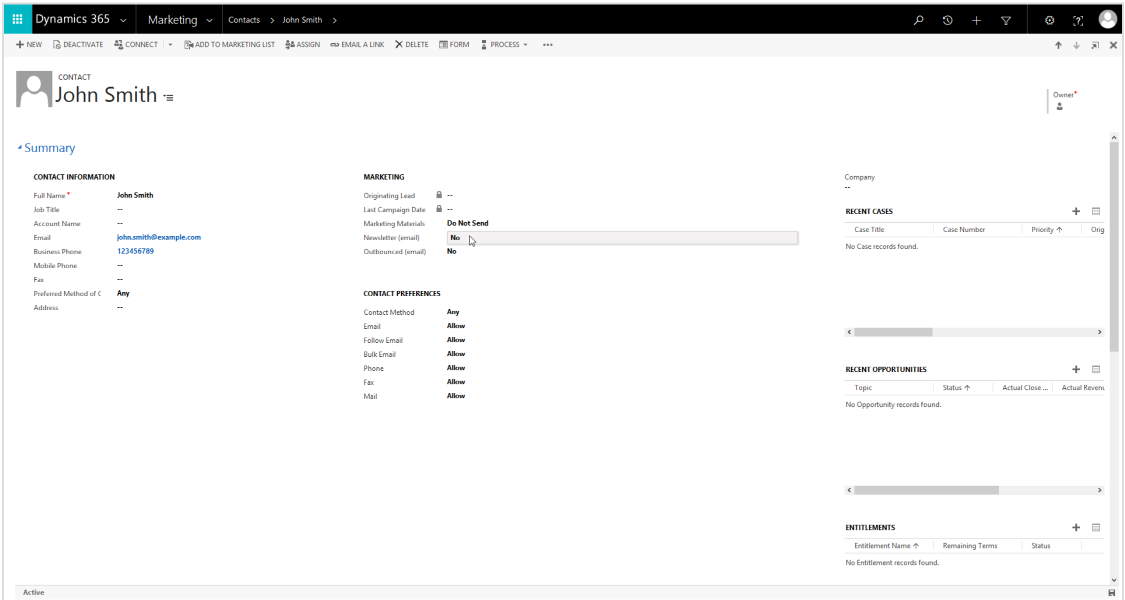
The response data that Episerver Campaign sends to your CRM via the interface includes:

- mailing opened
- link clicks in the mailing
- direct replies to the mailing
- unsubscribes (opt-outs)
- bounced recipient email addresses

> For unsubscribes (opt outs) and outbounces to be displayed, the required fields must be configured (see section Set up marketing permission and link to the client).

Consequence and display of an unsubscription (opt-out)

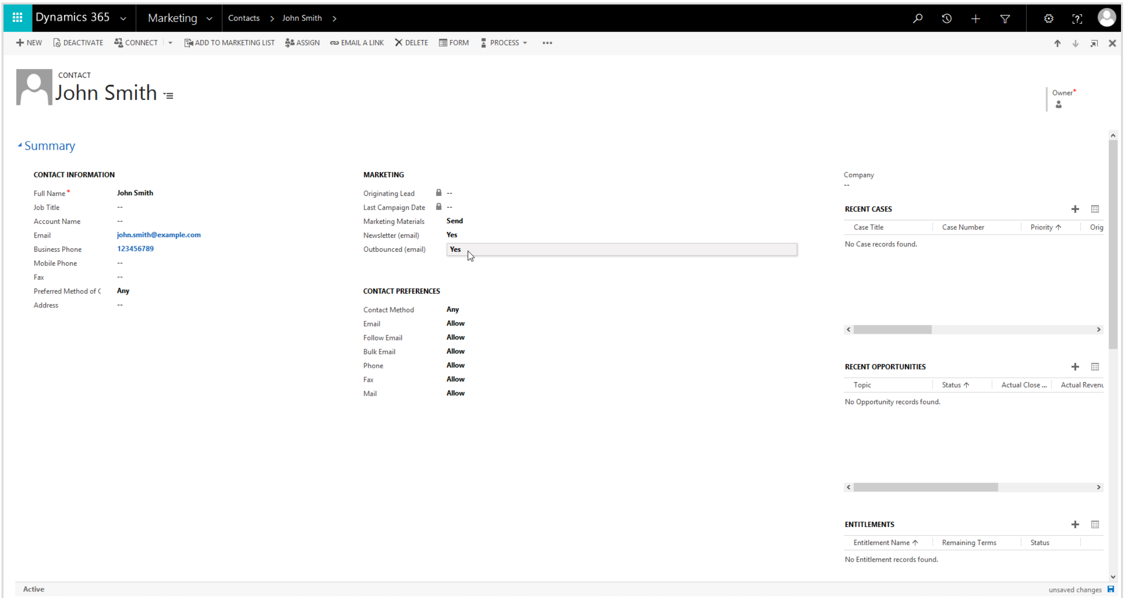
If Episerver Campaign registers an unsubscribes from a Smart Campaign or Marketing Automation message, then the marketing permission of the contact or lead is set from **Yes** to **No**. The corresponding contact or lead will no longer be transferred from Microsoft Dynamics to Episerver Campaign and will not receive any further messages.



If the contact or lead has provided a marketing permission for other newsletters, then the unsubscribe applies only to this one newsletter and not to any other newsletters to which the contact or lead has subscribed.

Consequences of an outbounce

If Episerver Campaign detects that an email is no longer reachable, then the outbounce status is changed from **No** to **Yes**. This status applies across all marketing permissions on the channel and across all clients, regardless of whether or not an outbounce has been detected in each client.

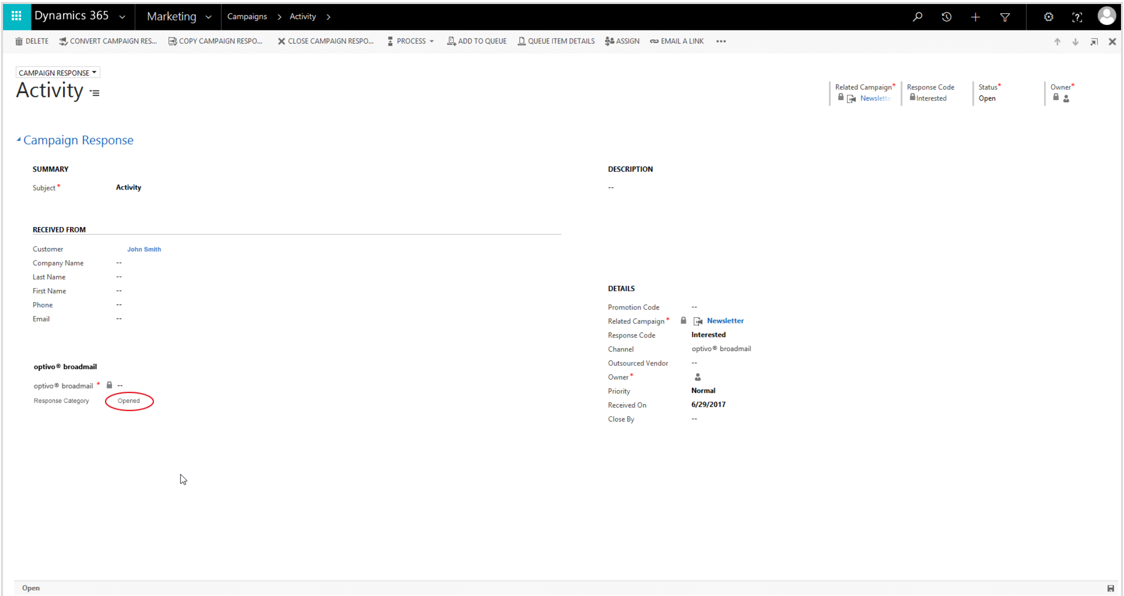


Campaign responses: Openings, clicks and direct replies

When a campaign has been run, the opens and clicks are imported as replies / campaign responses and assigned to the campaign in the CRM (saved in the campaign). The import differentiates between the following response categories:

- Opening
- Click
- Reply
- Autoresponder
- Unsubscription

You can use these categories as needed for further segmentation within your CRM.



Openings, clicks and replies are only imported for mailings sent using the campaign management (see section Sending mailings). Openings and clicks that come from a copied marketing list (see section Copying marketing lists) are not returned to the CRM.

Configuring a proxy server

The Microsoft Dynamics Integration allows you to setup the connection between your CRM and Episerver Campaign via a proxy server (if required by your network configuration).

A software tool is available from Episerver for testing communication via a proxy server. Please contact the Episerver customer support team to get this.

To configure communication via a proxy server, perform the following steps:

1. In the settings, click in the **optivo broadmail** area on **optivo broadmail configuration**.
2. Click **New** to create a new entry.
3. Give this new entry the name **Proxy configuratio**n. Entered this exactly as shown here.
4. In the **Value** box, enter the following text and change the value after colon to the value provided by your network administrator. If no value is required, then leave the line after the colon empty.

```
Domain: Username: Username password: Password Protocol: http
Host: 10.80.16.14 Port: 8080 CredentialType: basic
```

The integration supports the basic proxy server authentication type. The protocol can be either https or http.

Maintenance and troubleshooting

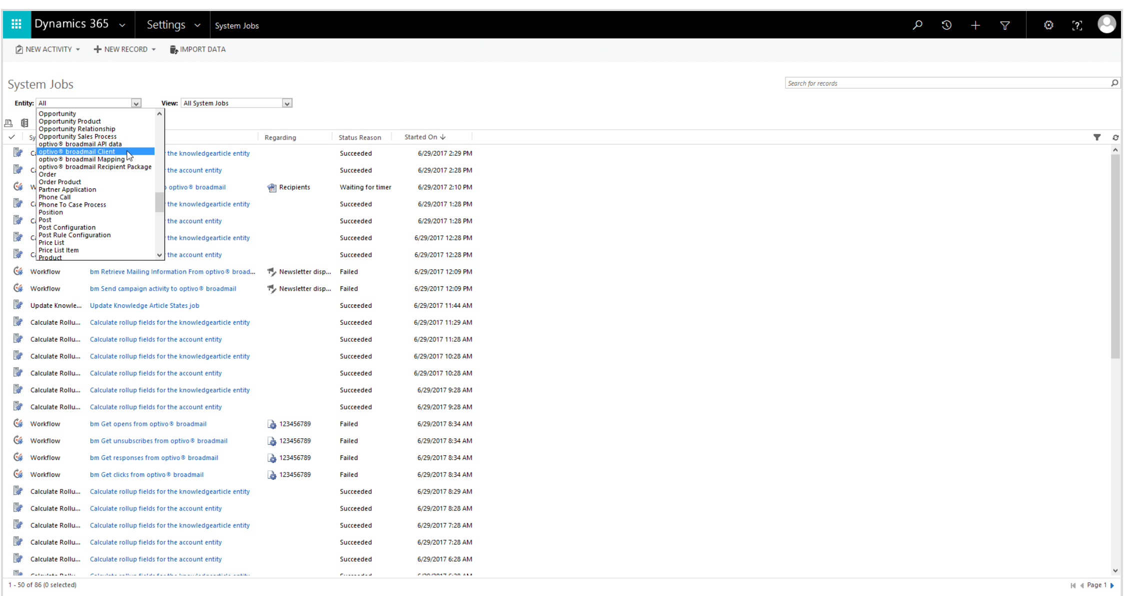
To carry out maintenance on the integration, optimize it or resolve errors, you can:

- activity workflows for
- view workflow error messages
- reduce the storage space used by the integration

Checking workflows for errors and activity

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. These are divided into four categories:

- optivo broadmail API data
- optivo broadmail recipient packets
- optivo broadmail client
- optivo broadmail allocation



Checking workflows for errors

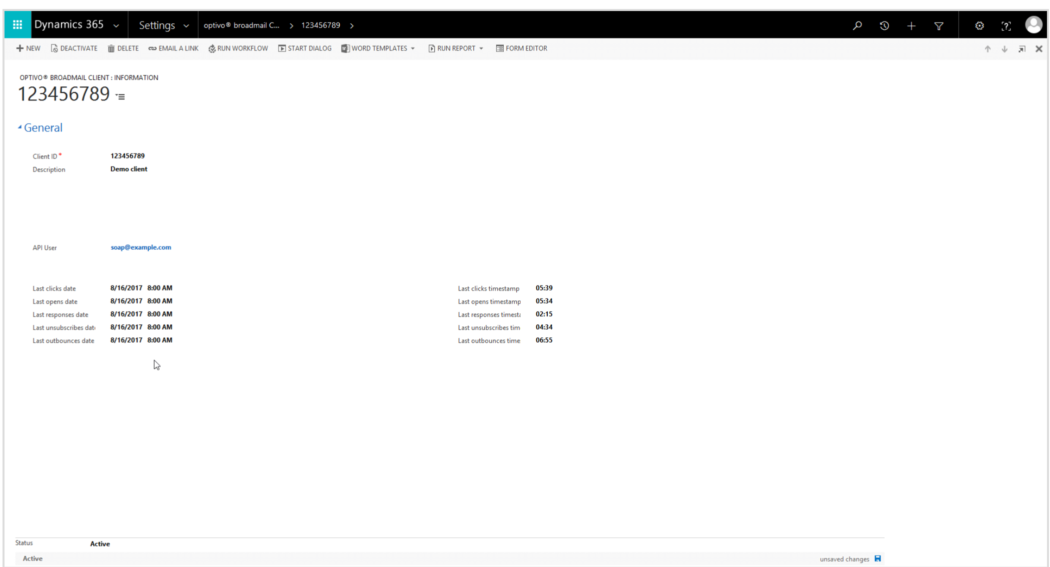
Check the **optivo broadmail client** and **optivo broadmail recipient packets** workflows for errors at regular intervals. If an error message is shown, look in the section Workflow error messages to resolve the issue.

Checking client workflow activity

To make sure that the workflows are active for a client, perform the following steps:

1. Open the settings and under the menu item **optivo® broadmail** menu, click **optivo® broadmail Clients**.
2. Double click the clients whose workflows you want to check. The Information window for the client opens. Five data fields are displayed providing you with information about the time of the last import for each data type:
    a. Last clicks date
    b. Last opens date
    c. Last responses date
    d. Last unsubscribes date
    e. Last outbounces date

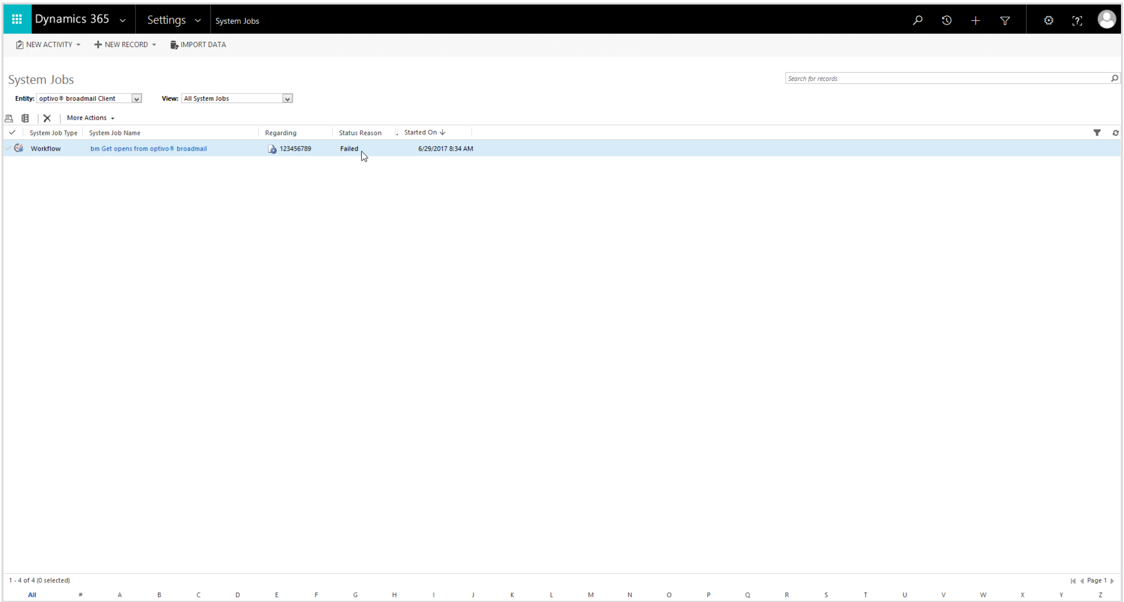
> If one or more imports were performed over an hour ago, then the workflow is no longer active. There can be several reasons for this, such as insufficient resources within the CRM or a network problem.



3. To restart the client workflow, click **Run Workflow**. If the problem persists after restarting the workflow, please contact your system administrator.

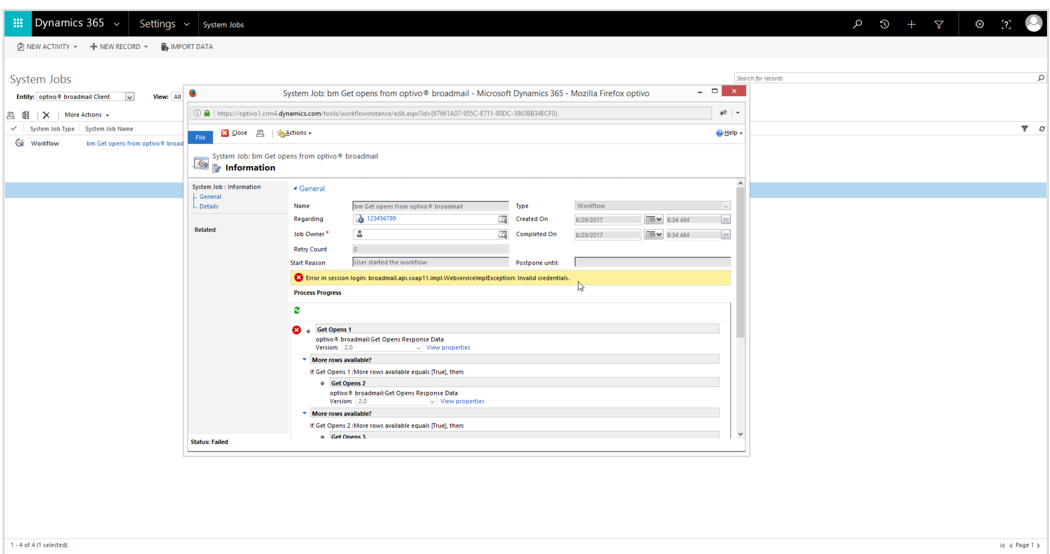
Workflow error messages

If a workflow did not run successfully, the **Status Reason** column under **Settings > System > System Jobs** will show the message **Failed**.

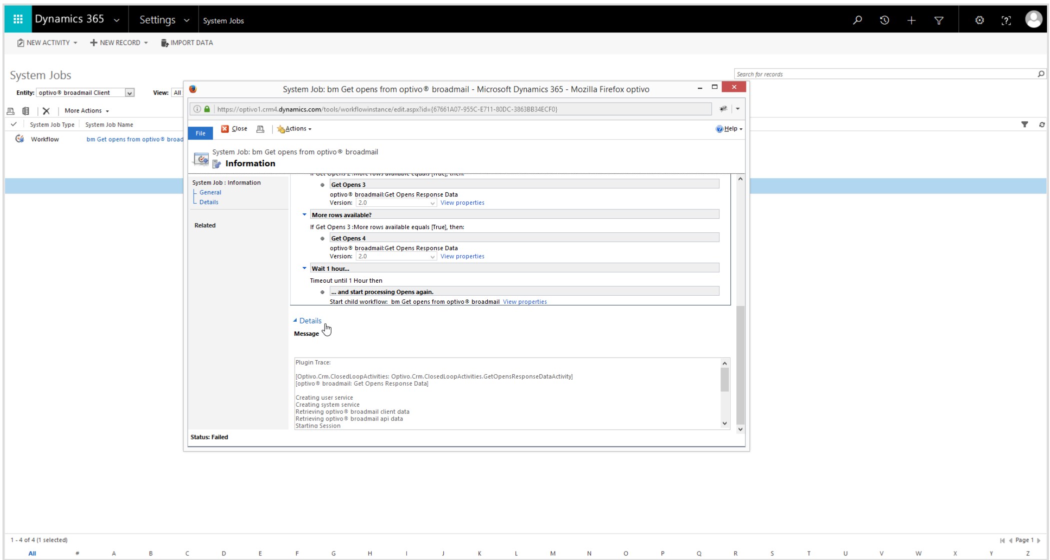


To see the reason for the error and resolve the issue, perform the following steps:

1. Click the name of the corresponding system job. The **Information** window for the system job opens. This gives you a detailed description of the error.



2. Resolve the error shown.
3. If you are unable to resolve the error, click **Details** below. This will show you the trace for the workflow.



4. Copy the text from the trace as well as the error message with the time of the error and contact the Episerver customer support team with this 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 disk space used

Two maintenance options are available for reducing the amount of disk space required by the integration:

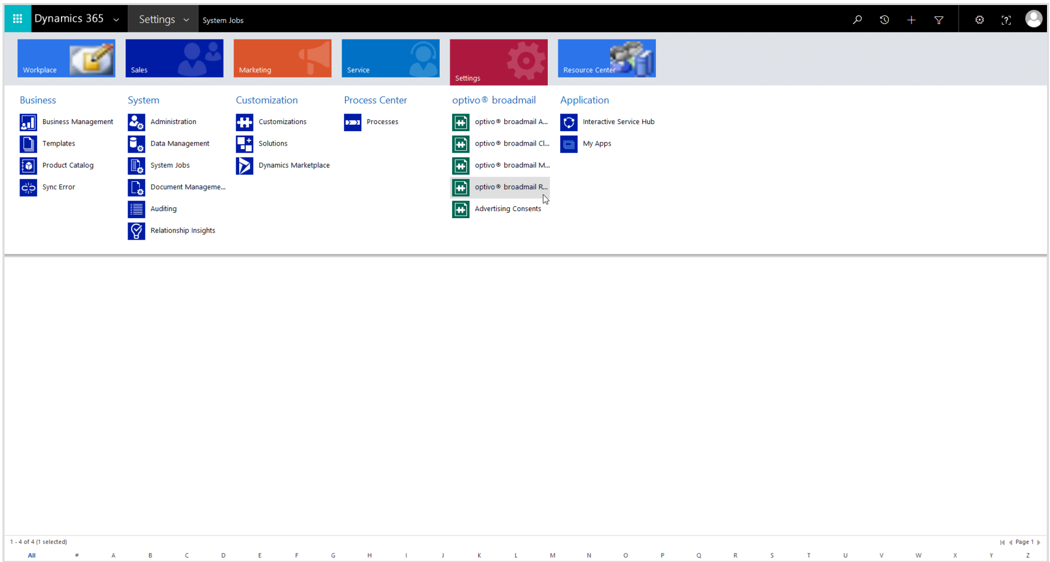
- delete any recipient packages that are no longer required
- delete completed workflow jobs

Note: Reducing the disk space used is optional. Not freeing up disk space does not affect the operation of the integration. Reduce the amount of disk space used to save storage resources and have a better overview of current and relevant workflows.

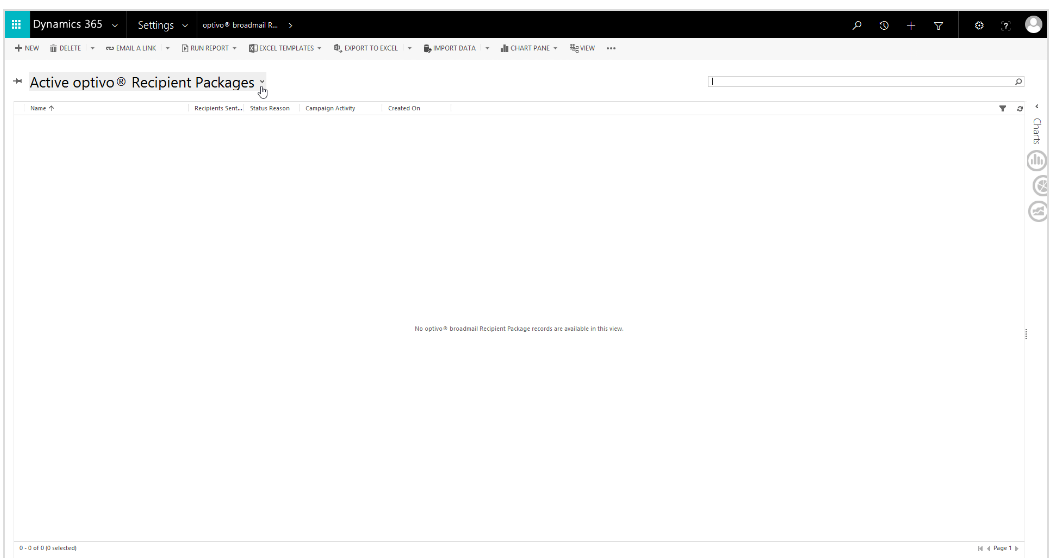
Delete recipient packages that are no longer required

To delete recipient packages that are no longer required, perform the following steps:

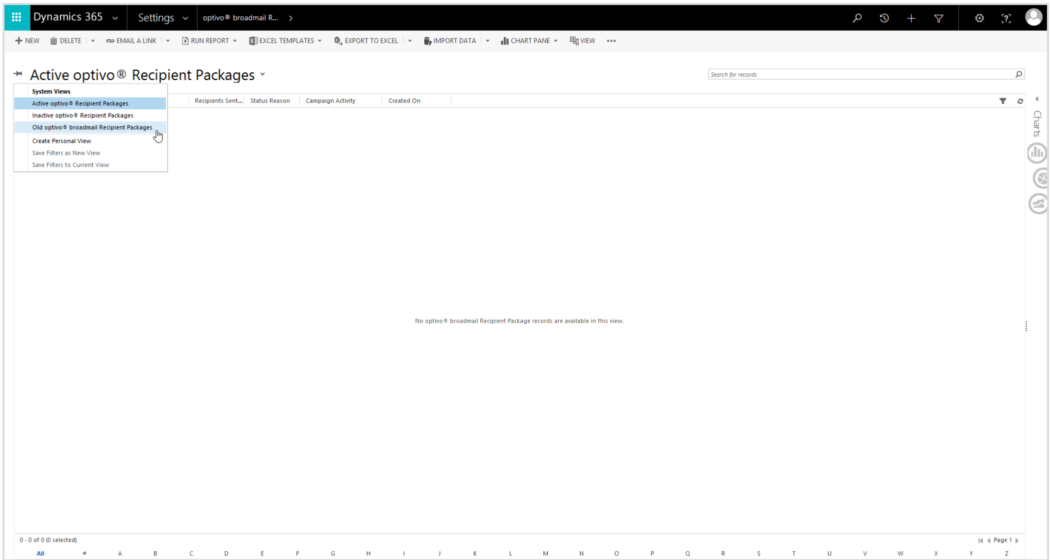
1. Open the settings and under the menu item **optivo® broadmail** menu, click **optivo® broadmailRecipient Packages**.



2. Click the downward pointing arrow to the right of the heading **Active optivo broadmail Recipient Packages**. A drop-down list opens.



3. In the drop-down list, select the option **Old optivo broadmail Recipient packages**.

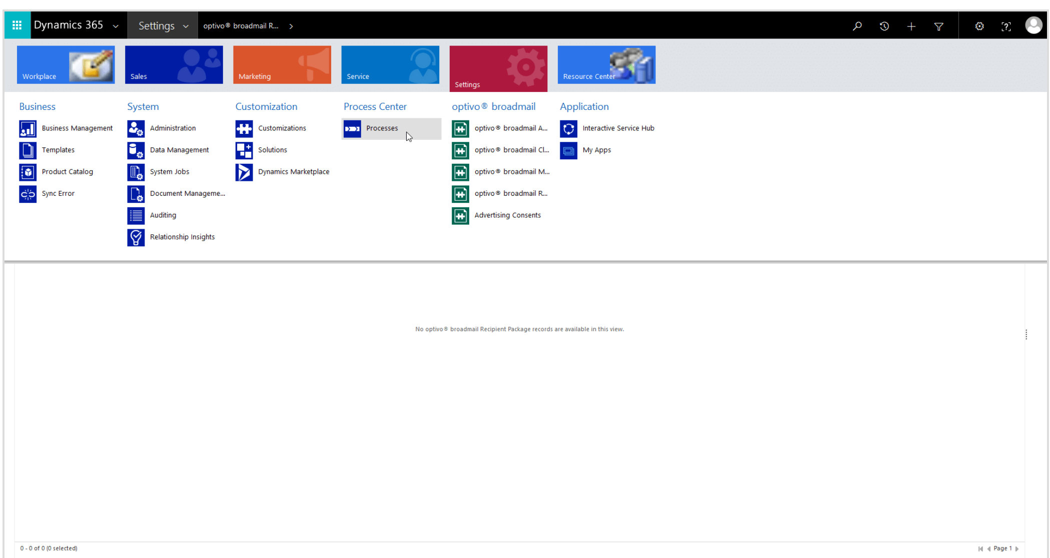


4. Select the recipient package to be deleted and click **Delete**. You have successfully deleted old recipient packages and reduced the storage space required.

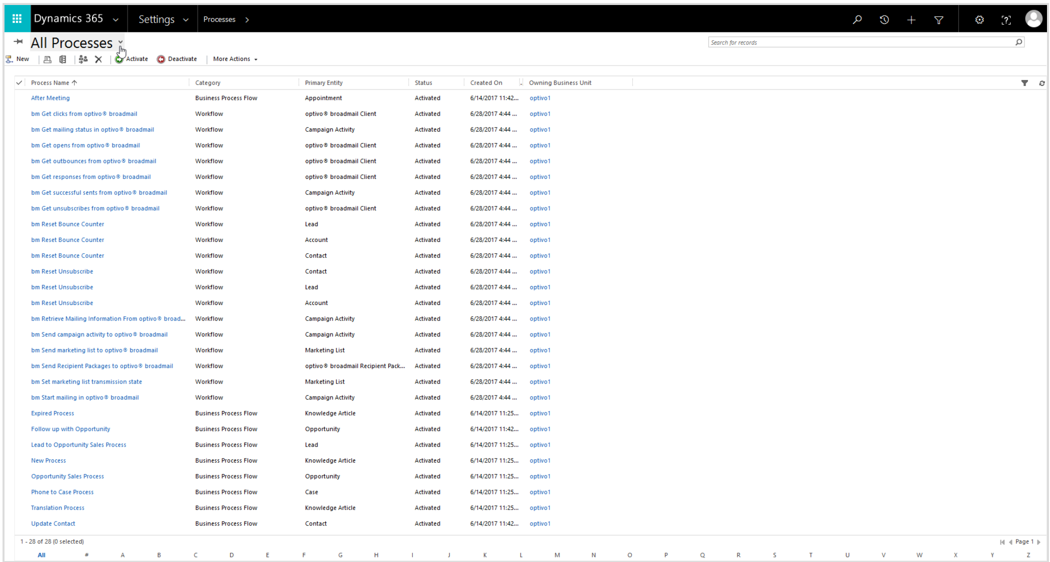
Deleting completed workflow jobs

By default, Microsoft Dynamics keeps all completed workflow jobs. If you would like to change the configuration to automatically delete completed workflow jobs, perform the following steps.

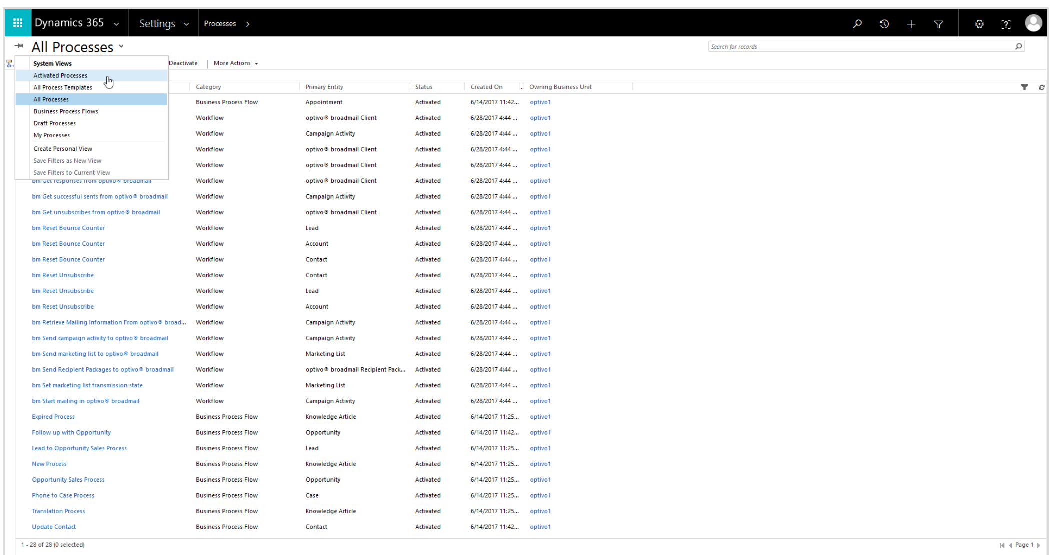
1. Open the settings and under **Process Center**, click **Processes**.



2. Click the downward arrow to the right of title. A drop-down list opens.

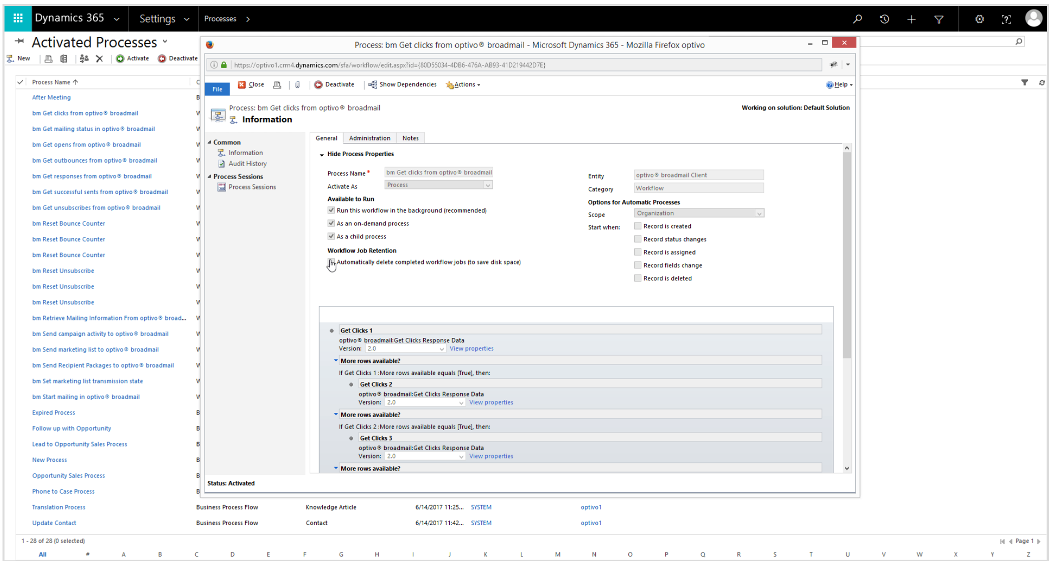


3. In the drop-down list, select the corresponding option, such as **Activated Processes**.



4. Click the workflow whose workflow job should be automatically deleted after completion. The **Information** window for the selected workflow opens.
5. Under **Workflow Job Retention**, place a tick in the checkbox next to **Automatically delete completed workflow jobs (to save disk space)**.

> To activate the checkbox you may have to deactivate the workflow for a short period. Once you have ticked the checkbox, you can again activate the workflow.



6. Click **Close**. You have successfully configured automatic deletion of workflow jobs and reduced the amount of disk space required.

Salesforce integration

Send Episerver Campaign mailings directly from your Salesforce CRM and use contact/lead data to automatically personalize your mailing contents. With the Salesforce integration you can transfer customer-specific fields (up to the third level) to your recipient lists and use, for example, personalized salutations for leads and contact owners.

With just a few clicks you can start campaign mailings from the Salesforce user interface and receive all the important response data for each individual recipient after your mailings have been sent, e.g. openings, clicks, outbounces, direct replies and unsubscriptions.

Range of features and supported versions

The Salesforce integration of Episerver Campaign supports the following features and versions.

Feature	Enterprise Edition	Unlimited Edition	Performance Edition
Campaign management	✔	✔	✔
Transfer of recipient data	✔	✔	✔
Transfer of returned emails/response data: Openings, clicks, direct replies	✔	✔	✔
Synchronization of unsubscriptions and outbounces	✔	✔	✔

Setup in Episerver Campaign

1. To set up the Salesforce integration in your client, contact our customer support team and ask for the integration software package.
2. Provide Episerver with the following information:
   - Your SOAP API username in Episerver Campaign. If you do not have an SOAP API user account, our customer support team will be happy to set this up for you. In order for us to do this, please create a separate email address that you do not use for logging into Episerver Campaign.
   - Let us know whether, in addition to the standard data, you would like additional CRM data transferred to your Episerver Campaign recipient list (see Transfer additional fields to Episerver Campaign).
   - The client IDs that are to be used with the integration (up to three clients are supported for the integration).

To view your client ID, open the Episerver Campaign start menu, and under **Administration**, click **API overview**. Then switch to the **SOAP API** tab.

The Salesforce topics describe how to install, configure and use the Salesforce integration. If you experience any problems during setup or operation, contact the customer support team.

Salesforce integration: Installation

For the installation of the Salesforce integration, our customer support team will provide you with a link to the installation package.

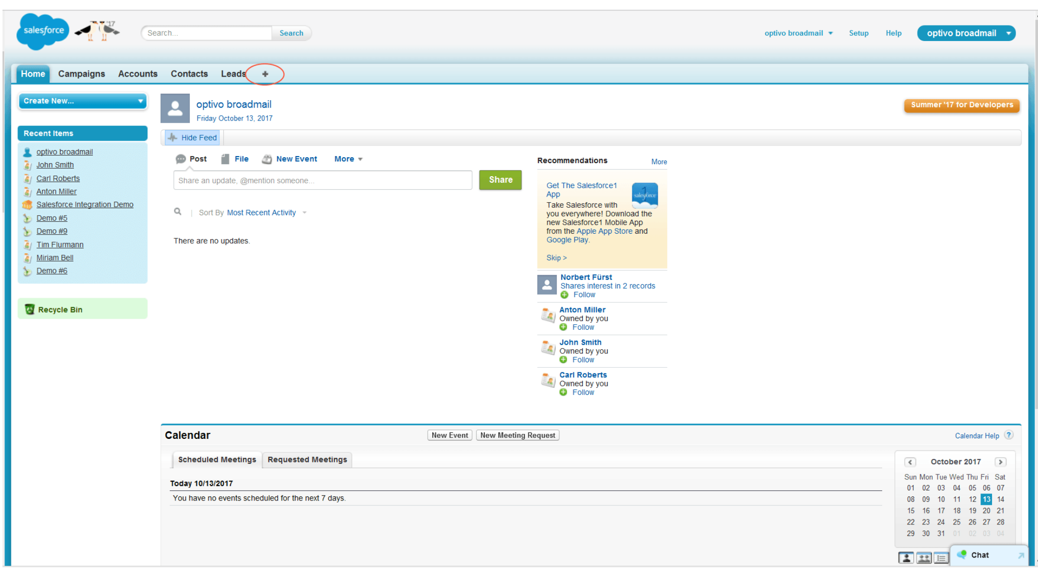
After the installation is complete, you can access the Salesforce integration features via the following two tabs:

1. **Administration**: This tab contains different options to configure, start and stop data exchange between Episerver Campaign and Salesforce.
2. **Mandators**: Store your access data for your Episerver Campaign clients in this tab.

Open tabs

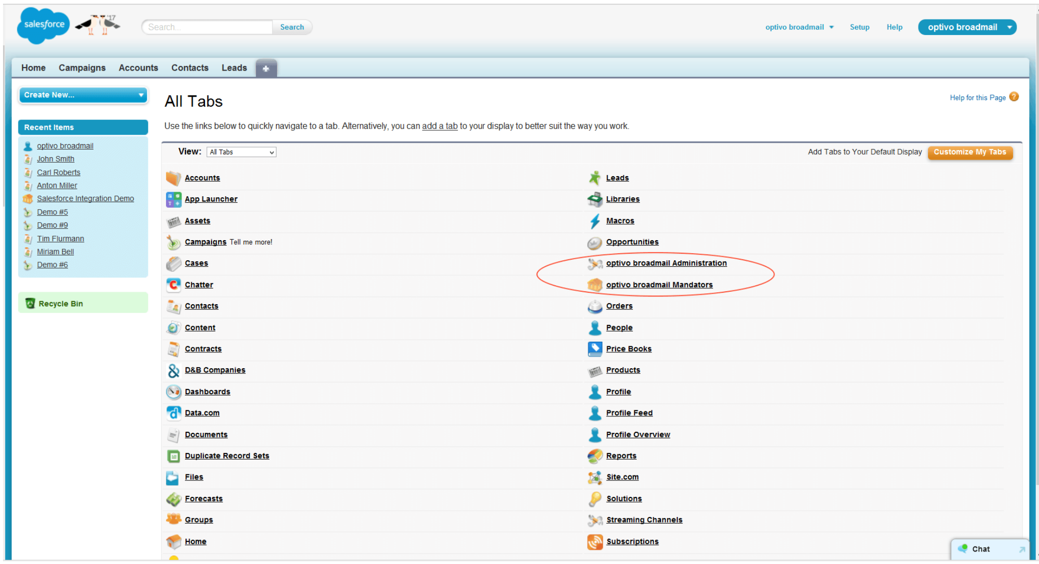
To open the Salesforce integration tabs, perform the following steps:

1. Log in to your Salesforce CRM.
2. Click the plus sign (**+**) in the Salesforce menu bar. The All Tabs window opens.



3. Click the Salesforce integration tab you would like to open. The selected tab opens in a new

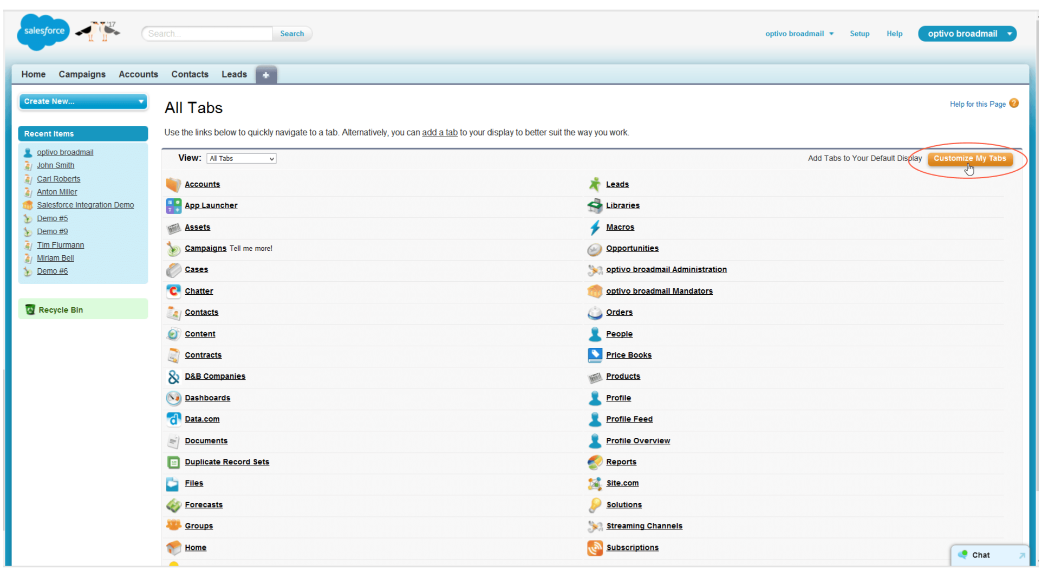
window.



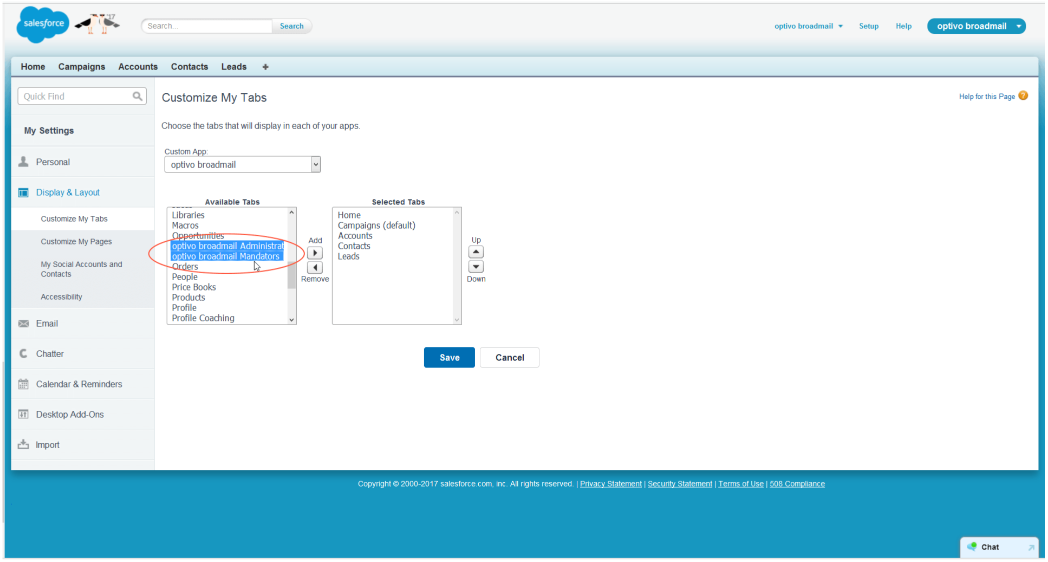
Add tabs to menu bar

For quick access to the Salesforce integration tabs, you can add these to your Salesforce CRM menu bar. Perform the following steps:

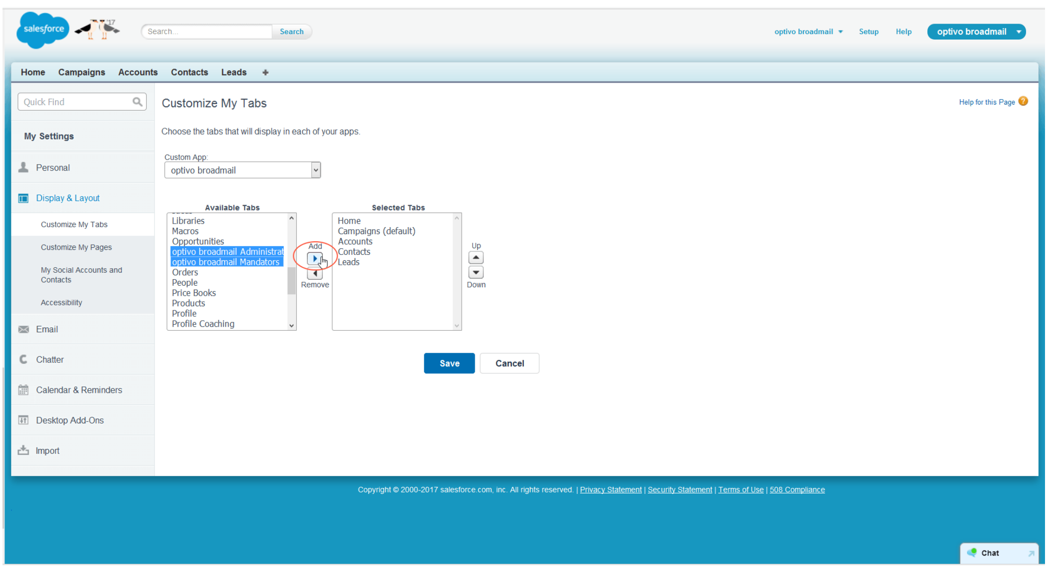
1. Log in to your Salesforce CRM.
2. Click the plus sign (**+**) in the Salesforce menu bar. The All Tabs window opens.
3. Click **Customize My Tabs**. The Customize My Tabs window opens.



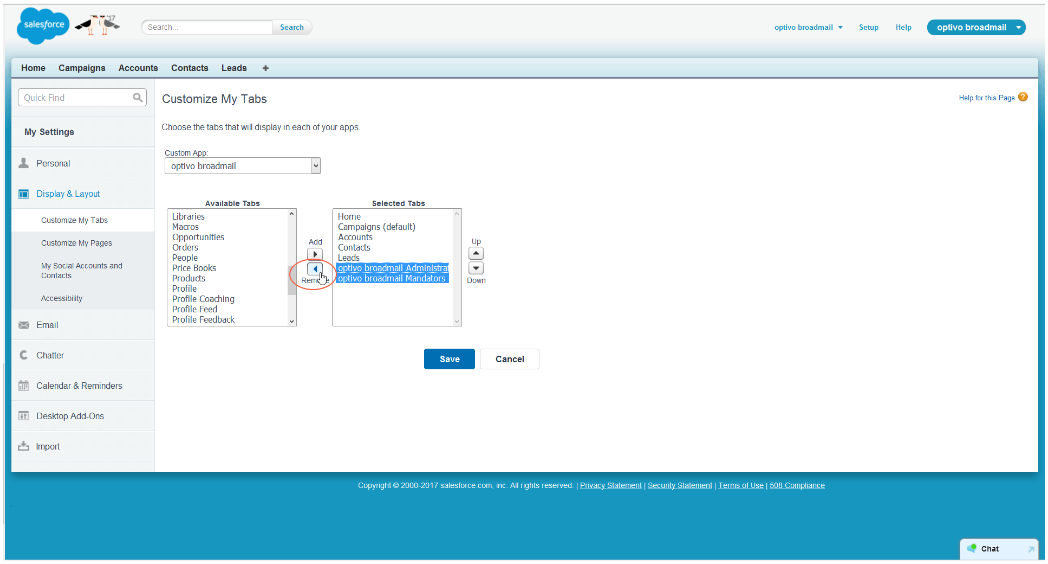
4. In the **Available Tabs** field, highlight the Salesforce integration tabs you would like to add to the menu bar. To select multiple tabs at once, hold down the **Ctrl** key on your keyboard.



5. Click **Add** . The selected tabs are added to the **Selected Tabs** field.



6. Click **Save**. You have successfully added the Salesforce integration tabs to the Salesforce menu bar.
7. To remove the tabs from the menu bar, reopen the **Customize My Tabs** window, highlight the tabs you would like to remove and then click **Remove** . After you save your changes, the selected tabs are removed from the Salesforce menu bar.



Salesforce integration: Configuration

After installation, you need to configure the Salesforce integration. The configuration consists of the following tasks:

1. Store your client IDs and SOAP API user data

   The Salesforce integration supports the connection of up to three Episerver Campaign clients.

2. Start data exchange between Salesforce and Episerver Campaign

If you would like to transfer fields that are not included in the default configuration, you also have to configure the additional fields and have these added to your Episerver Campaign recipient lists.

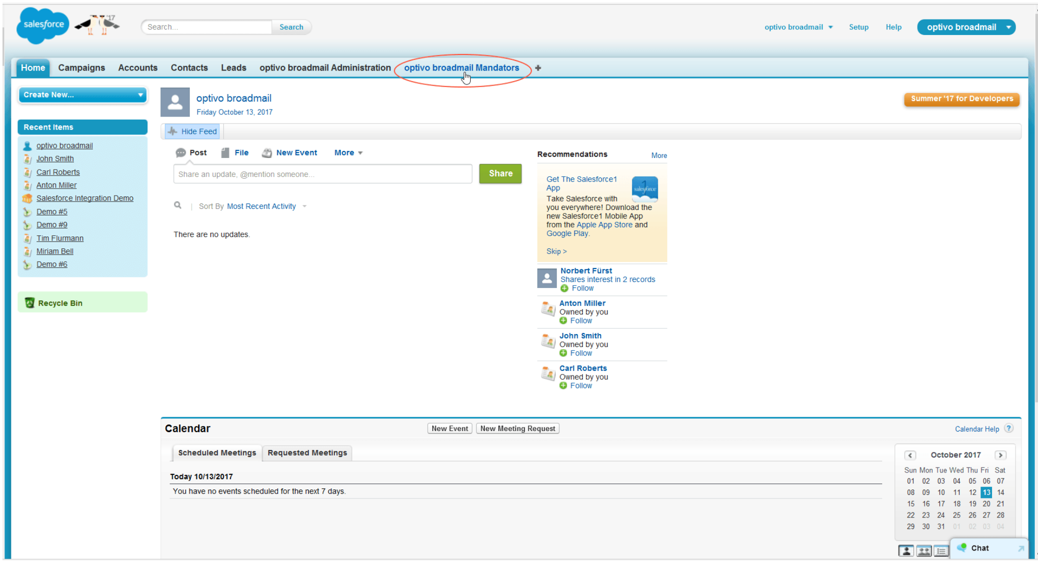
Store client IDs and SOAP API user data

Communication and exchange of data between Salesforce and Episerver Campaign takes place securely via an interface, the SOAP API.

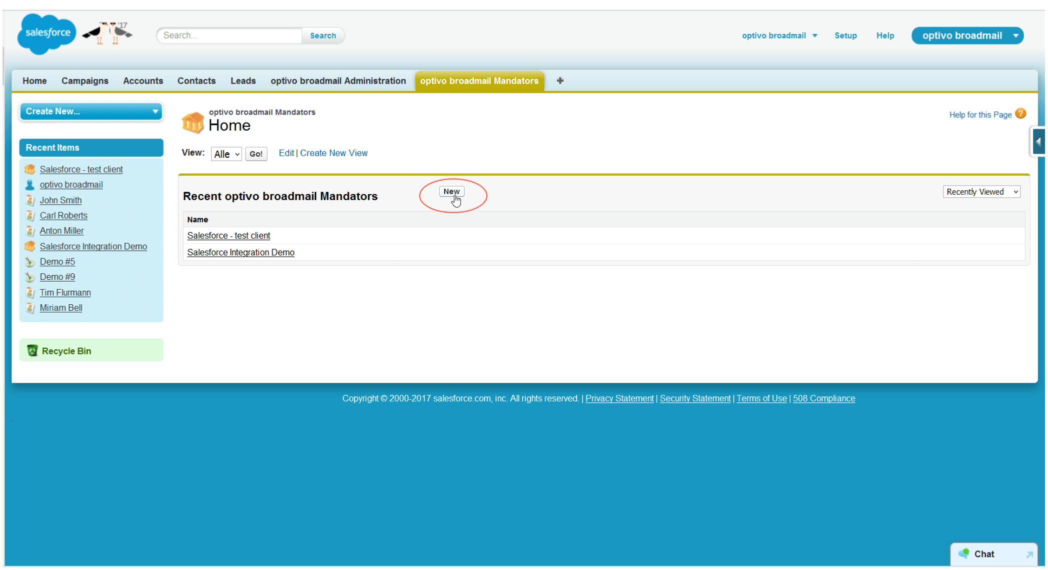
To link your CRM with up to three Episerver Campaign clients via the interface, you must enter the respective client IDs and their SOAP API user data in Salesforce. Perform the following steps:

If you do not yet have an SOAP API user account, contact our customer support team who will be happy to set up a user account in the desired client for you.

1. Log in to your Salesforce CRM with administrator rights.
2. Switch to the **Mandators** tab.

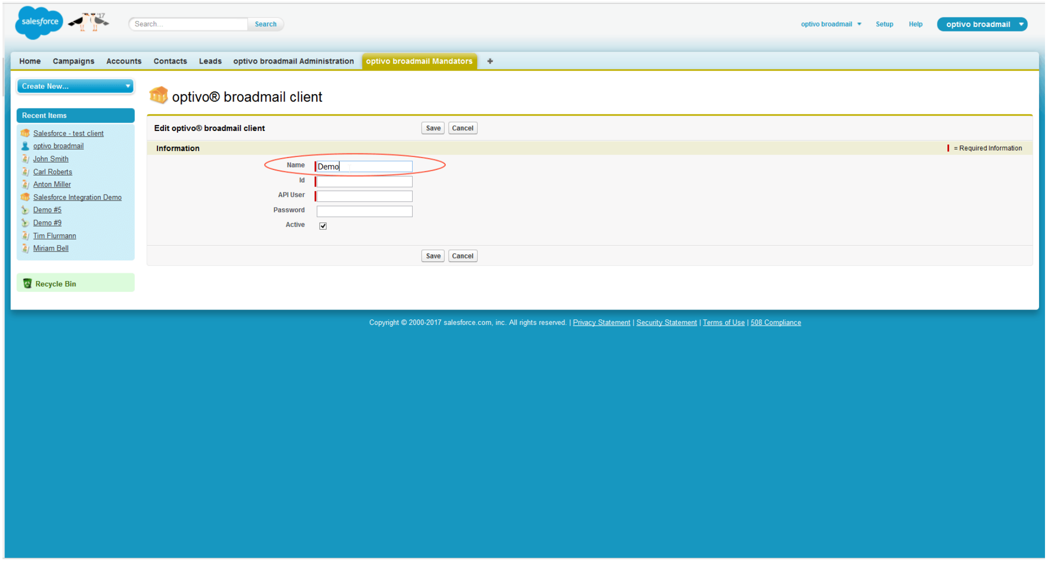


3. To create a new Episerver Campaign client in Salesforce, click **New**.

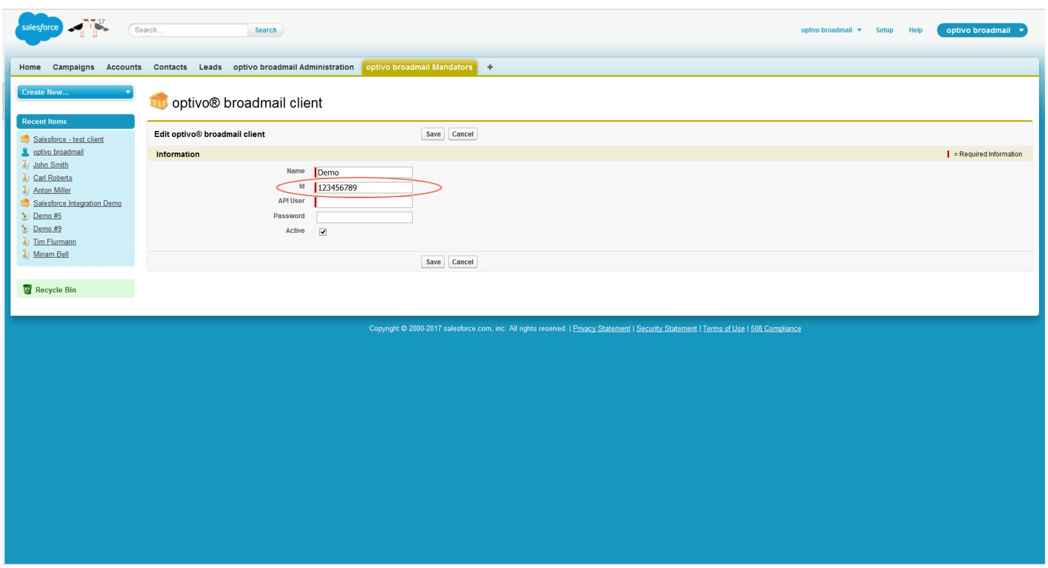


If you would like to change the settings for a previously created client, click on the name of the respective client under **Recent Mandators**. The Mandator window opens.

4. In the **Name** box, enter the name of the client (as it should be displayed in Salesforce). The name can be chosen freely. It does not have to correspond to the actual client name used in Episerver Campaign.

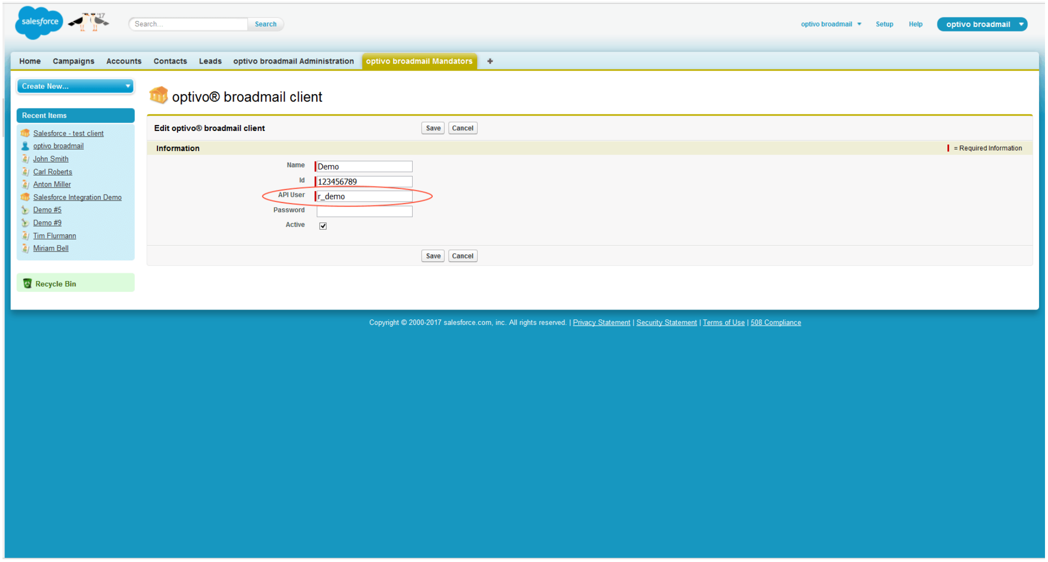


5. In the **Id** box, enter the client ID.

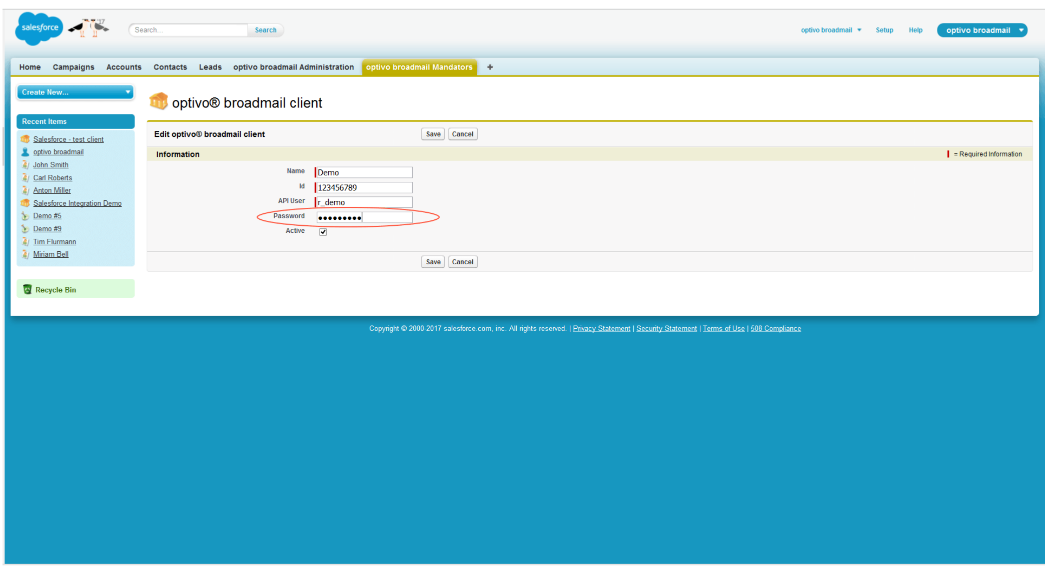


To view your client ID, open the Episerver Campaign start menu, and in the **Administration** menu, click **API overview**. Then switch to the **SOAP API** tab.

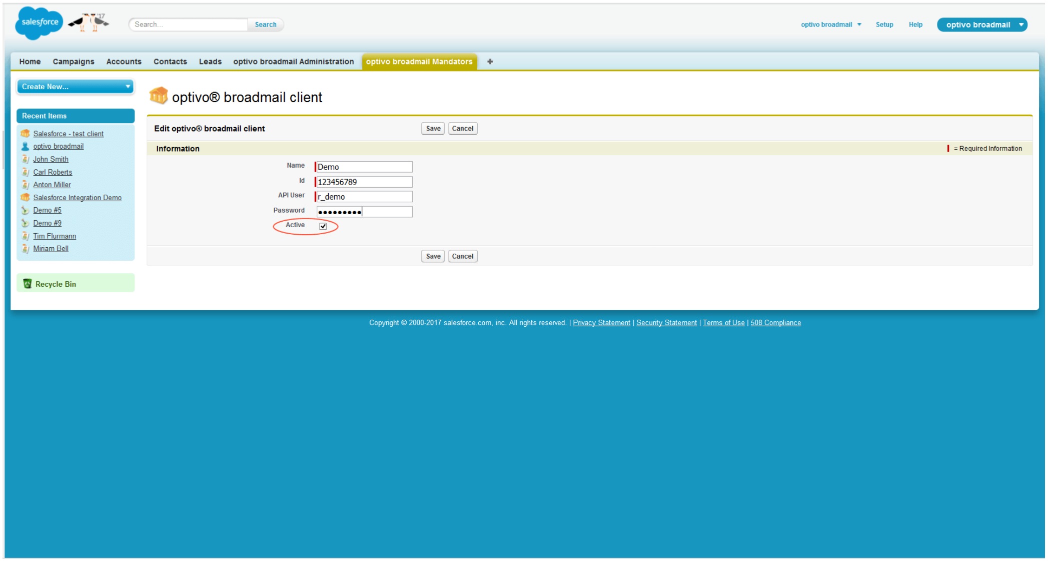
6. Under **API User**, enter your SOAP API user name.



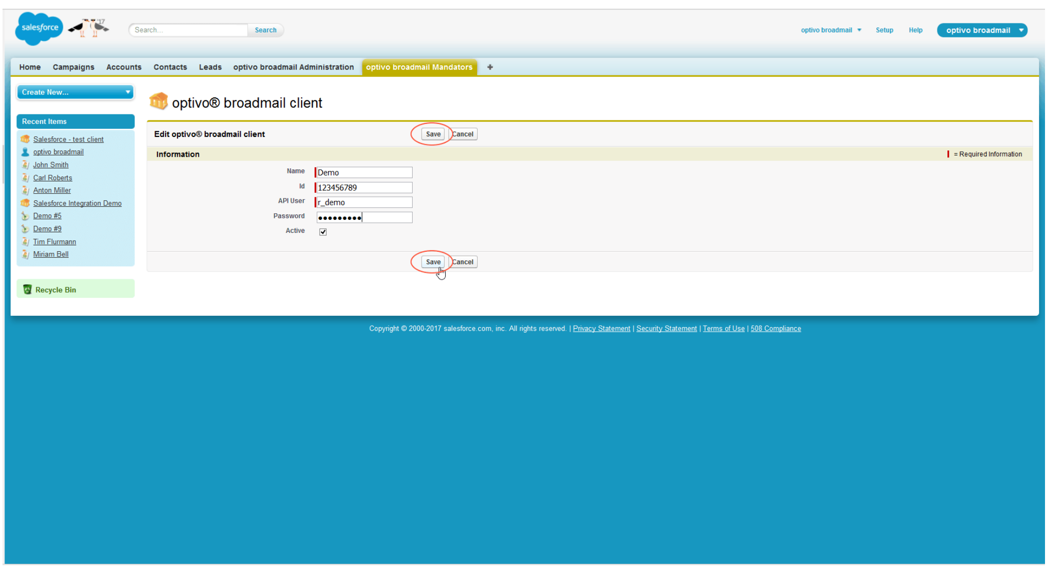
7. Under **Password**, enter your SOAP API password.



8. Select the **Active** check box (if not already selected).



9. When you have completed your entries, click one of the **Save** buttons.

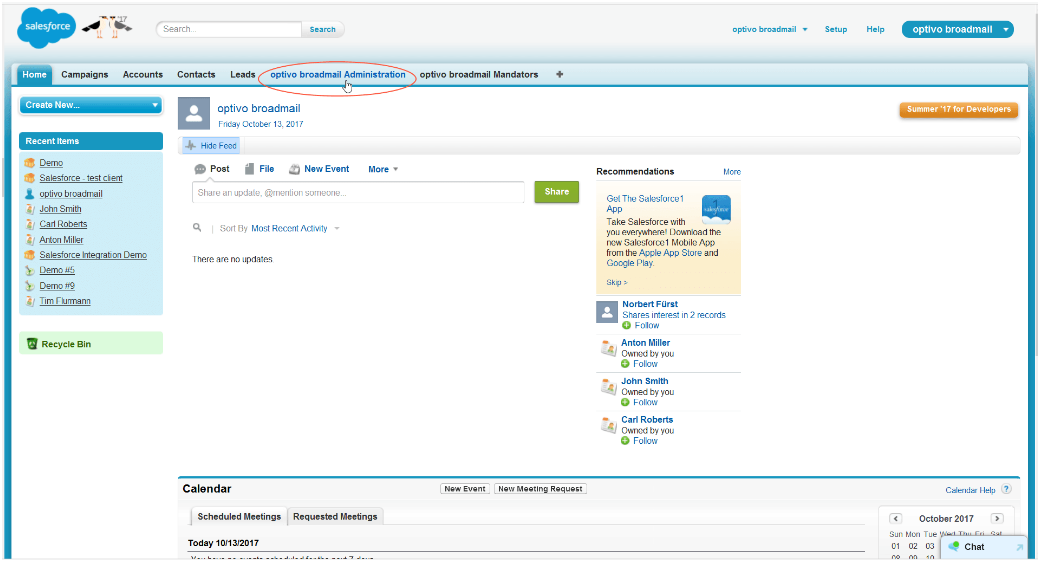


You have successfully stored the client ID as well as your SOAP API user data and connected your Episerver Campaign client to Salesforce. Repeat these steps for each additional client you would like to connect to Salesforce (the Salesforce integration supports the connection of up to three clients).

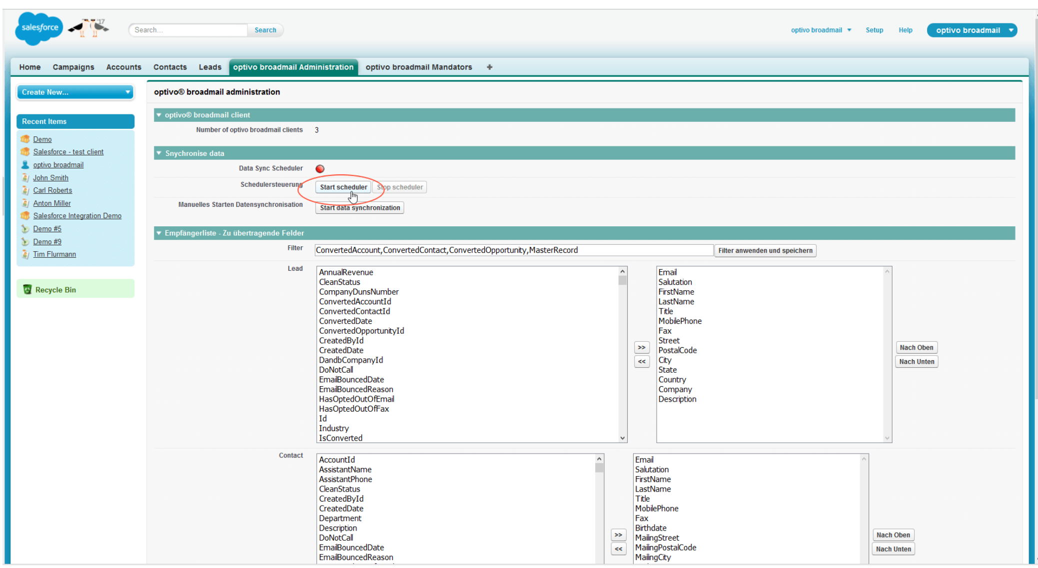
Start data exchange

After you have set up at least one client in Salesforce, you then need to start a data exchange between Salesforce and Episerver Campaign. Perform the following steps:

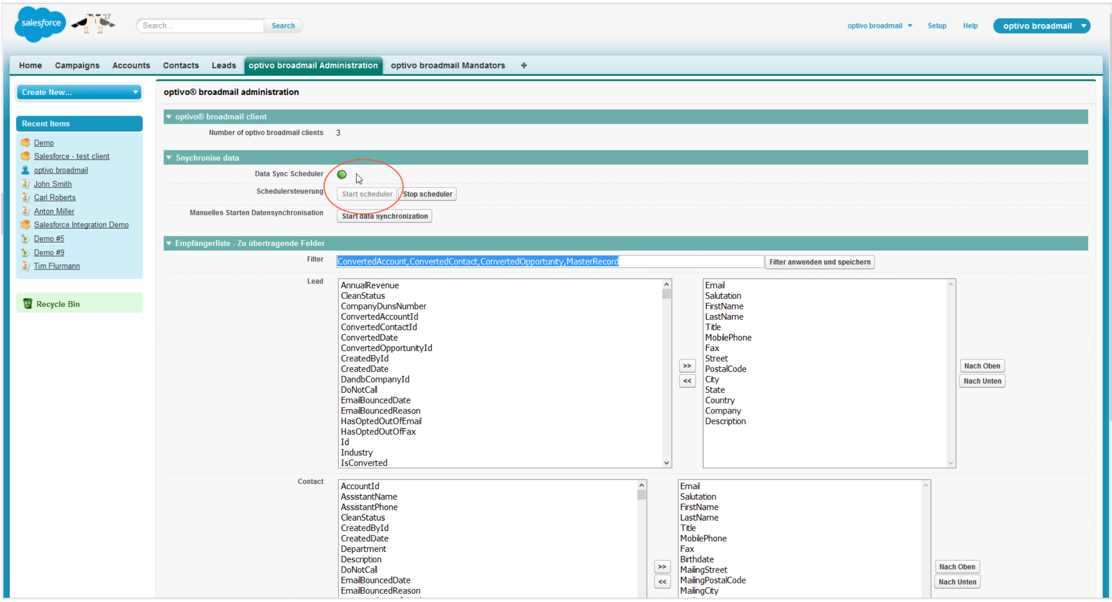
1. Log in to your Salesforce CRM with administrator rights.
2. Switch to the **Administration** tab. The administration window opens.



3. Under **Synchronize data**, click **Start scheduler**.



You have successfully started the data synchronization. When data synchronization is active, the **Start scheduler** button is grayed-out. In addition, the icon next to **Data Sync Scheduler** is lit up green.



Click **Stop scheduler** to stop the data synchronization. This may be necessary, e.g. if the configuration is faulty and you need to correct it.

You can click **Start data synchronization** to perform a (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 and thus facilitates the fault diagnosis.

Data fields transferred by default

You can use the contact data of your leads or contacts to personalize your mailings and for segmentation/target group creation in Episerver Campaign.

Using the Salesforce integration's default settings, the following data will be sent from Salesforce to Episerver Campaign:

Field	Type	Description
birthdate	date	recipient's date of birth (recipient type: contact)
city	string	recipient's place of residence (recipient type: lead)

Field	Type	Description
country	string	recipient's country (recipient type: lead)
email	string	email address of the contact or lead
entity_type	string	contains the entity type Lead or Contact
fax	string	recipient's fax number
firstname	string	recipient's first name
lastname	string	recipient's last name
mailingcity	string	recipient's city (recipient type: contact)
mailingcountry	string	recipient's country (recipient type: contact)
mailingpostalcode	string	recipient's postal code (recipient type: contact)
mailingstate	string	recipient's state (recipient type: contact)

Field	Type	Description
mailingstreet	string	recipient's street and house number (recipient type: contact)
mobilephone	string	recipient's mobile telephone number
postalcode	string	recipient's postal code (recipient type: lead)
salesforceid	string	unique ID for the contact/lead in Salesforce
salutation	string	recipient's title
sfcampaignid	string	unique ID of the Salesforce campaign
state	string	recipient's state (recipient type: lead)
street	string	recipient's street and house number (recipient type: lead)
title	string	recipient's title (e.g. Dr., Prof.)

Transfer additional fields to Episerver Campaign

If required, you can transfer other Salesforce data fields to Episerver Campaign, in addition to the standard ones. You can use these fields in your omnichannel campaigns. The Salesforce integration will then be able to directly access linked data sets (Salesforce objects up to the third level), such as the contact person who manages the contact/lead in your company or the name of the department head, in addition to your contact's/lead's data and attributes.

This allows you to personalize your campaign messages to an even greater extent, e.g. by using customized greetings: Each contact or lead is greeted by the staff member who actually manages the contact/lead.

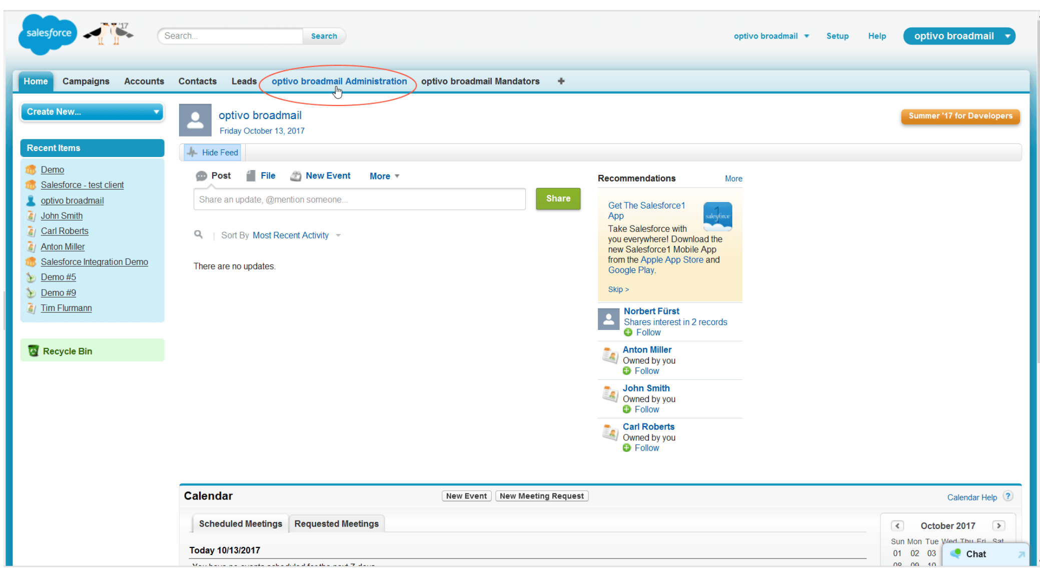
To set up the transfer of the additional data fields, you need to:

- Configure the additional data fields in Salesforce
- Have the relevant additional fields added to your recipient lists by the customer support team

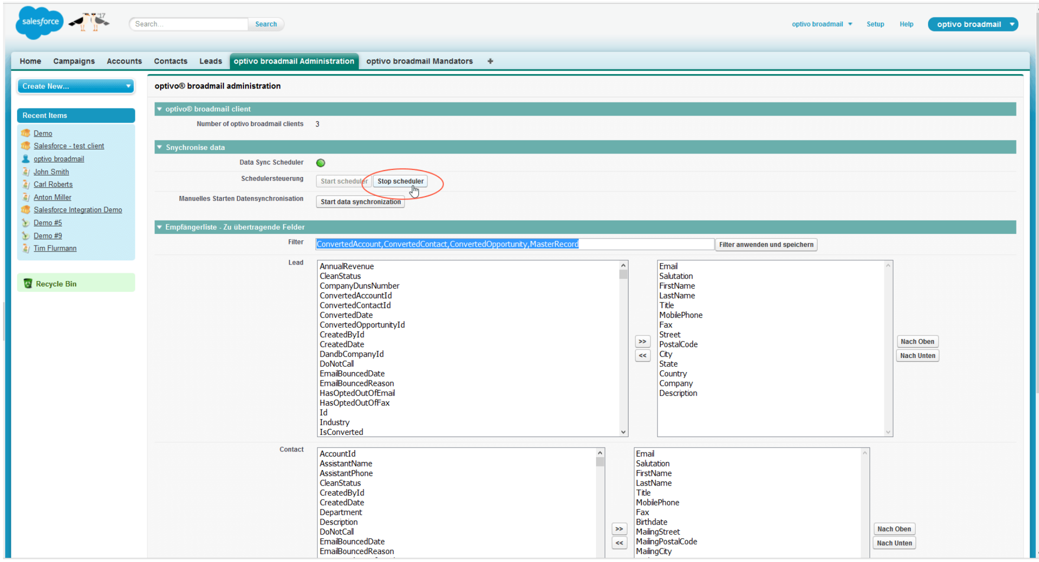
Perform the following steps:

Configure additional data fields

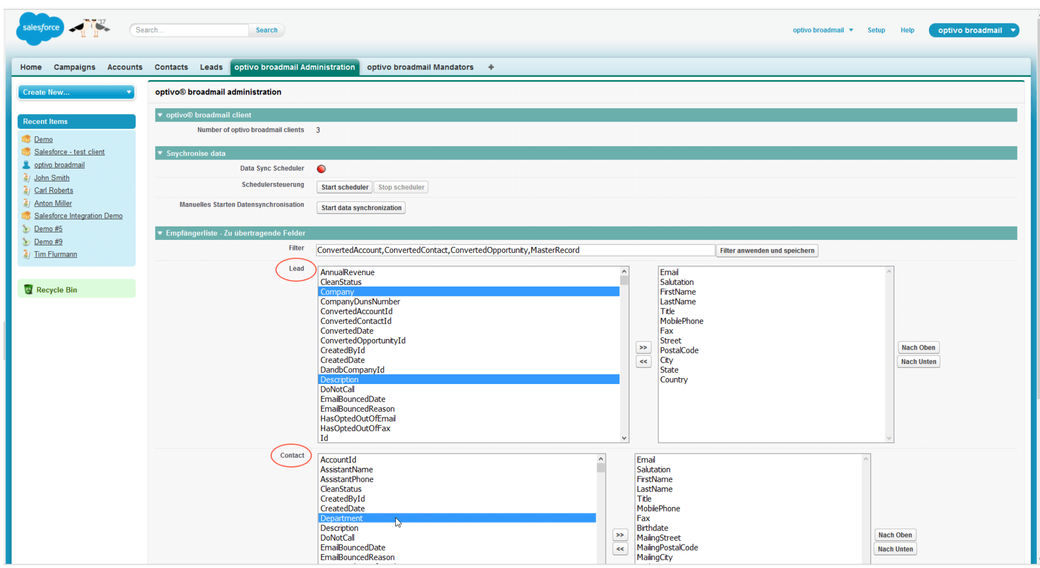
1. Log into your Salesforce CRM with administrator rights.
2. Switch to the **Administration** tab. The administration window opens. In the fields area, you can find the data fields that can be transferred to Episerver Campaign, separate for leads and contacts.



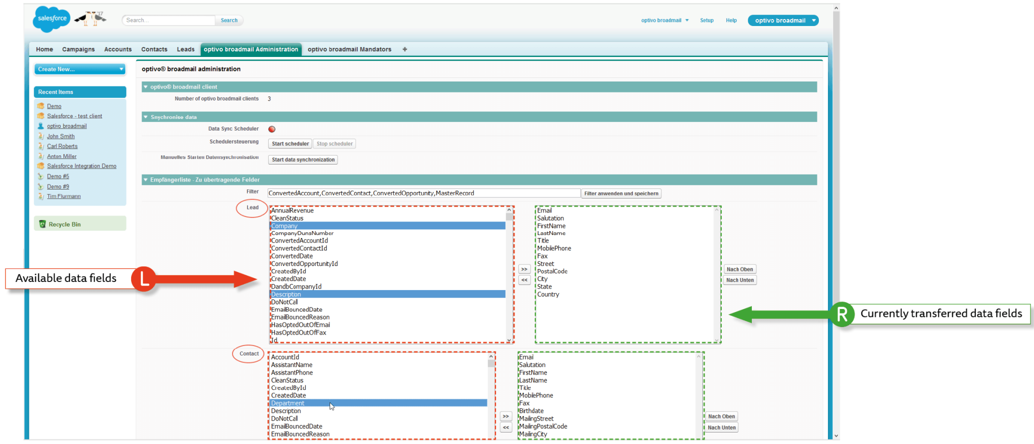
3. When data synchronizing is enabled, disable synchronization by clicking **Stop scheduler**.



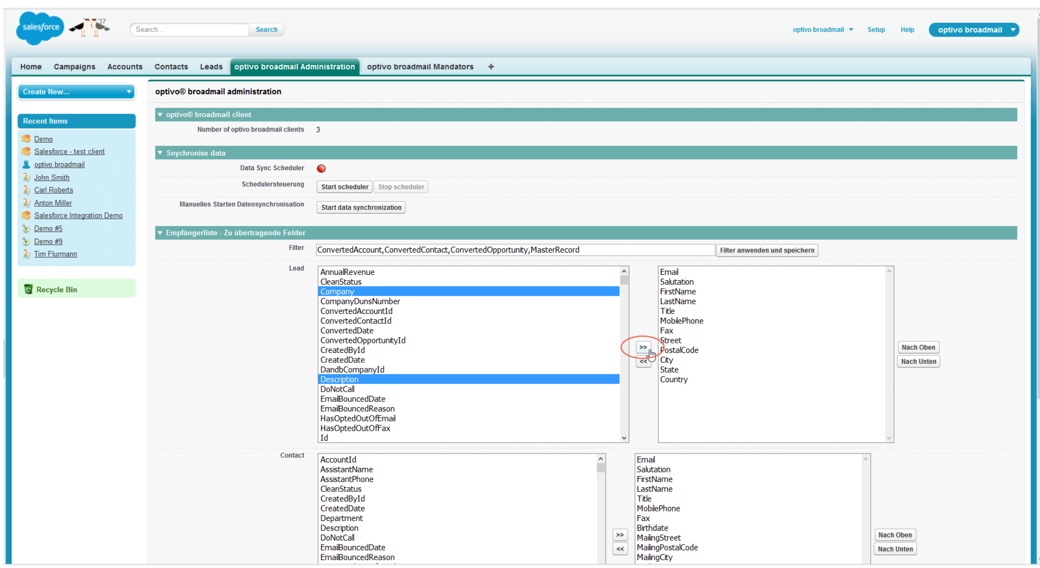
4. In the **Lead** and/or **Contact**” lists to the left, select the data field you would like to transfer to Episerver Campaign. To select multiple data fields at once, hold down the **Ctrl** key on your keyboard.



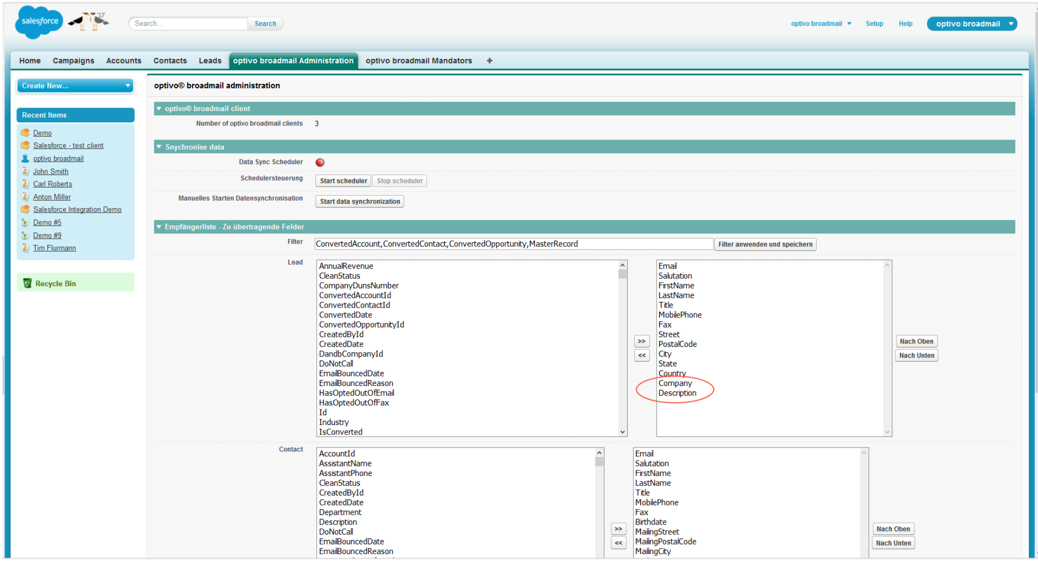
The lists on the left contain the Salesforce objects that can be transferred to Episerver Campaign. The lists on the right contain the Salesforce objects that are currently transferred to Episerver Campaign.



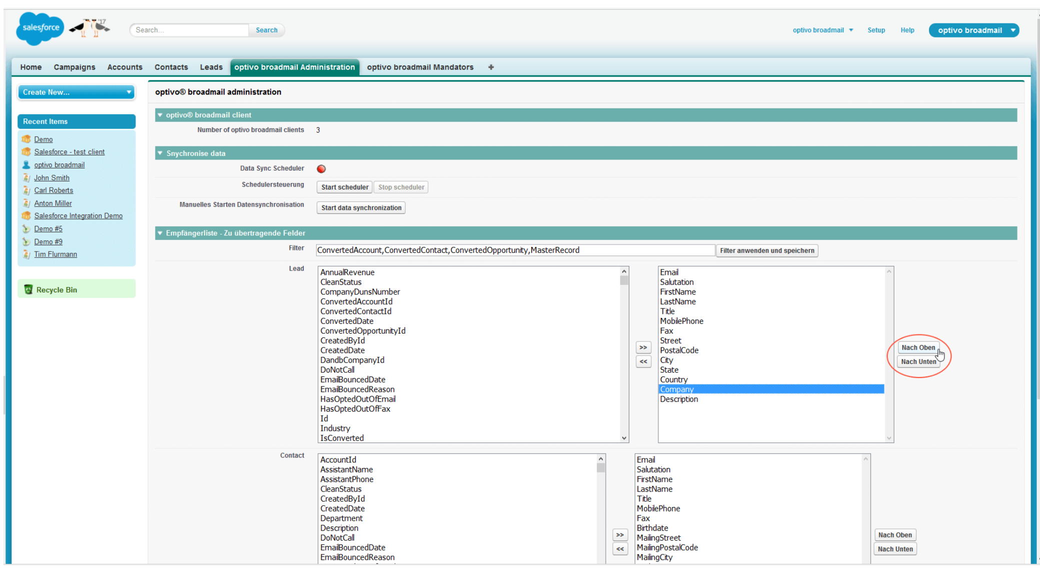
5. To add one or more selected data fields to the list of data fields to be transferred, click the right arrows (**>>**).



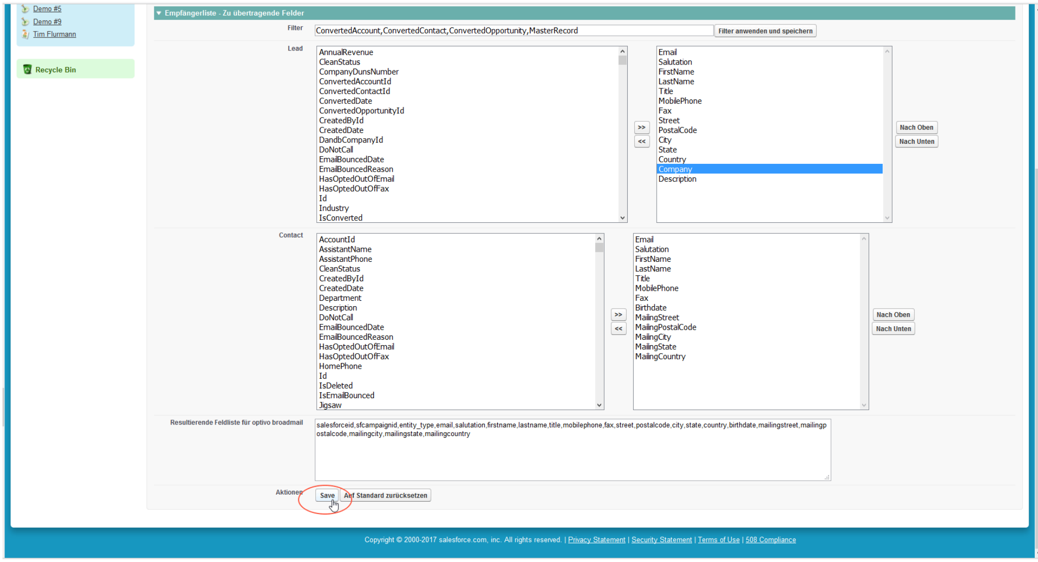
The selected data fields are added to the list of fields to be transferred.



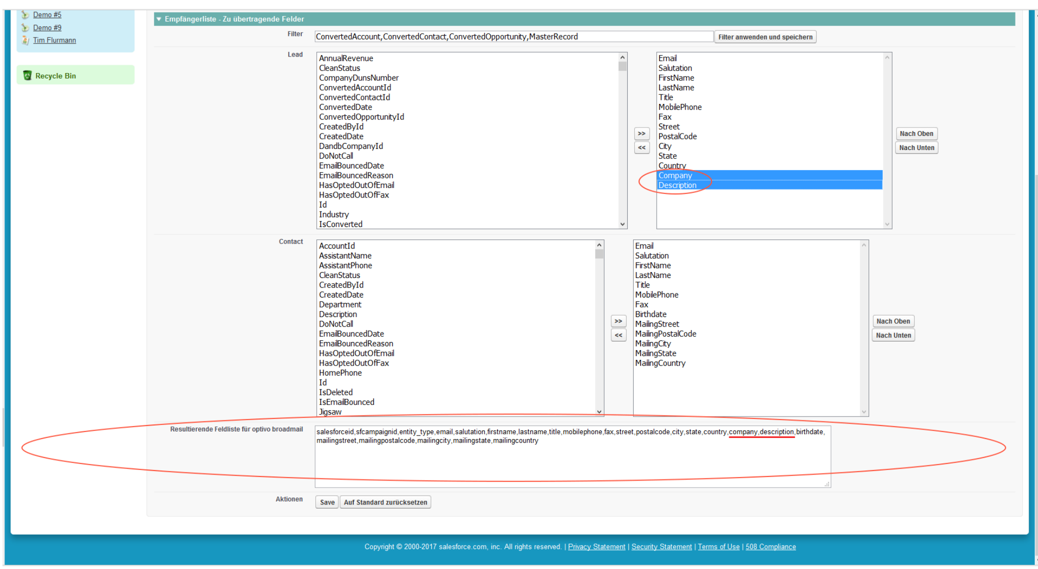
6. Optional: If required, you can change the order in which the data fields are transferred to Episerver Campaign by selecting the respective data field and clicking **Nach Oben** (**Up**) or **Nach Unten** (**Down**).



7. To save your settings, click **Save** at the bottom of the screen.



You have successfully configured additional data fields to be transferred to Episerver Campaign. Under **Resultierende Feldliste für optivo broadmail** (**resulting field list for** Episerver Campaign), the list of data fields to be transferred is expanded by the newly added data fields.



If you would like to discard your changes and return to the default settings, click **Auf Standard zurücksetzen** (**Reset to default**).

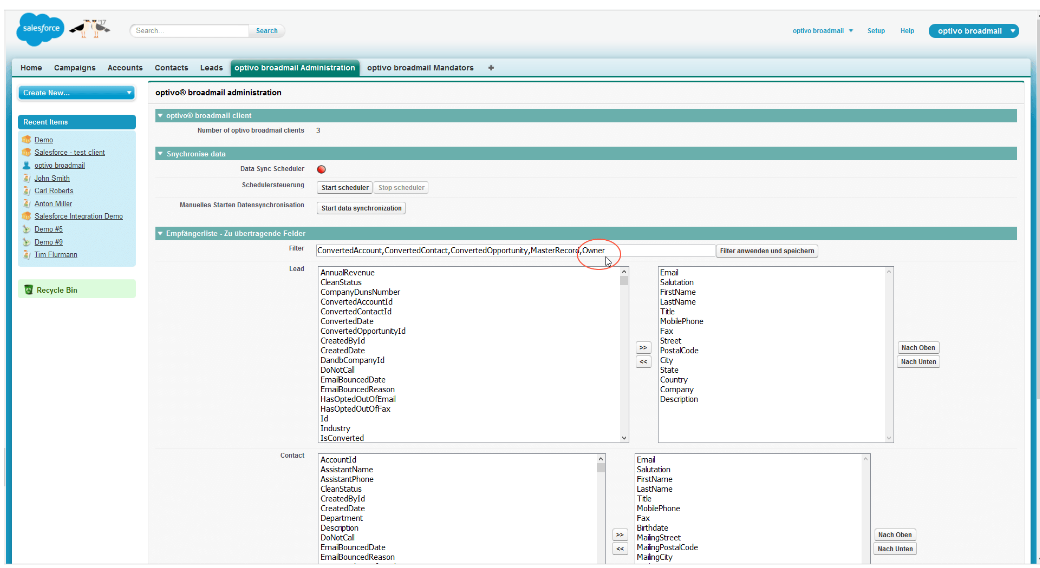
8. Do not close this window as you will need this screen for the next step Request additional fields to be added to recipient lists.

For technical reasons, not all of the available Salesforce objects can be displayed in the **Lead** and **Contact** lists at the same time. You can use the filter function to hide individual data fields or entire data field groups. This way, Salesforce objects which were previously not visible due to the limit are now displayed. If individual data fields that you would like to transfer to Episerver Campaign are missing in the list, you can, e.g. hide the data field group **Owner**. Perform the following steps:

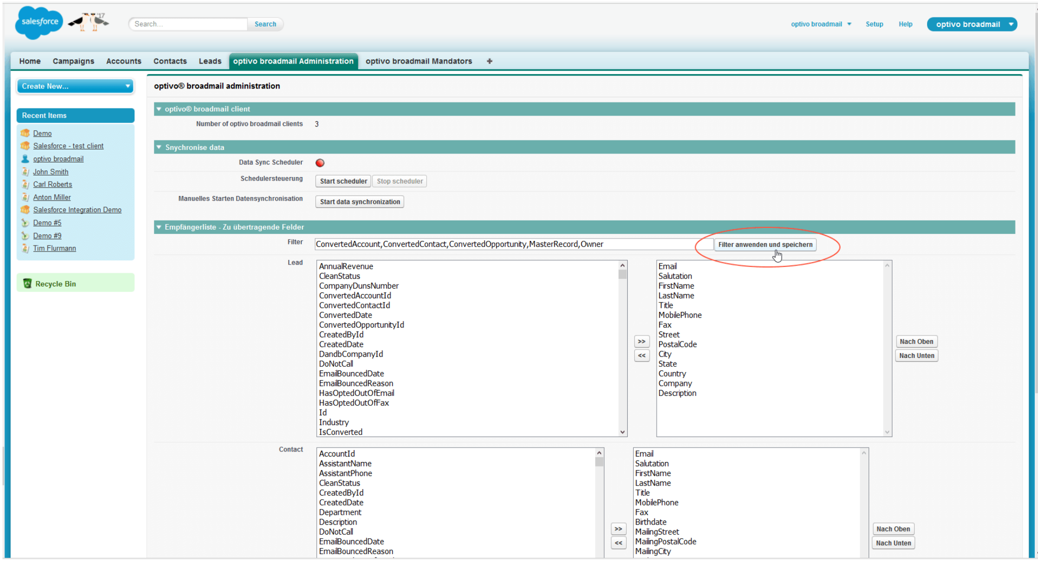
9. Make sure that you saved all previously made changes to the data fields to be transferred.

When you edit and apply the filter, all unsaved changes to the data fields are lost. Always save any changes prior to editing the filter.

10. Under **Filter**, add the entry **Owner**. Separate this entry with a comma; do not use any spaces.



11. Click **Filter anwenden und speichern** (**Apply filter and save**). All data fields that start with **Owner** are now hidden and previously non-visible Salesforce objects are automatically displayed.

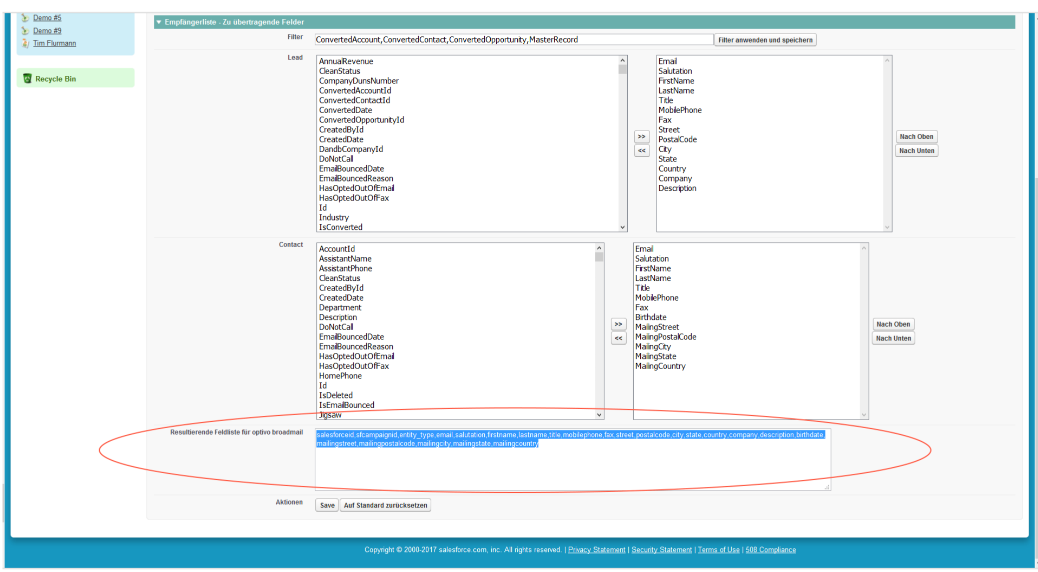


12. Find the desired, previously hidden data field in the list and add it to the data fields to be transferred using the arrow button (**>>**).

Request additional fields to be added to recipient lists

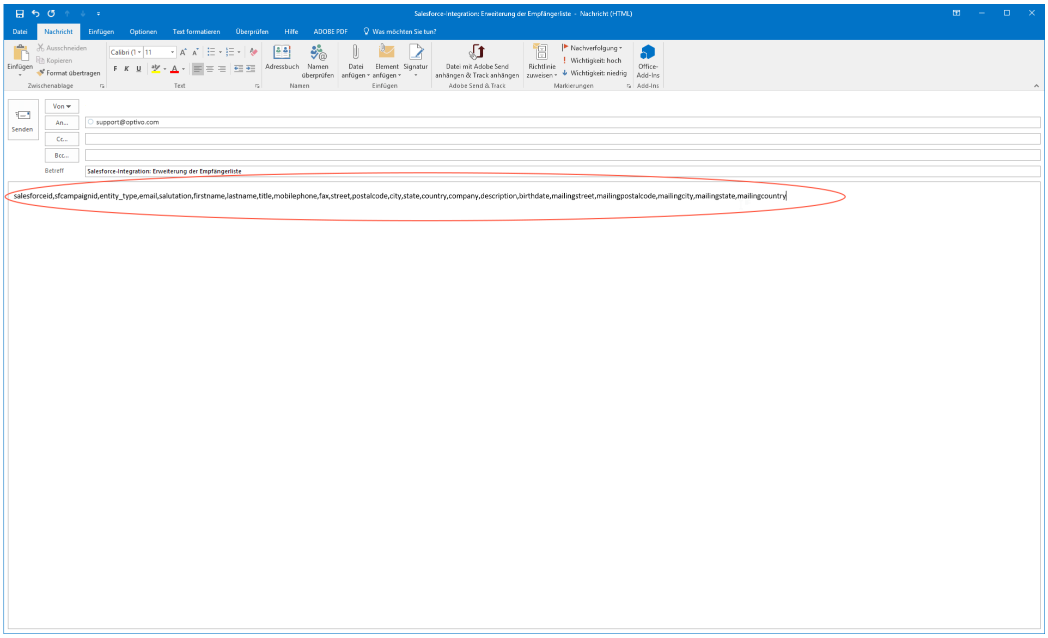
After you have configured the additional data fields and saved your settings, have the relevant additional fields added to your recipient lists by our customer support team. Perform the following steps:

1. Under **Resultierende Feldliste für optivo broadmail** (**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 this email to: developmentsupport@episerver.com.



Our staff will make the corresponding updates to your recipient lists. After the update is completed, you will receive a confirmation email.

4. When you receive the confirmation email, enable data synchronization by clicking Start scheduler in the **Administration** tab (also see Start data exchange).

   The additional data fields are automatically transferred to Episerver Campaign after data exchange has been enabled and you can then use the respective Salesforce objects to personalize your mailings via the different field functions.

Send mailings

With the Salesforce integration, you can send campaign mailings via Episerver Campaign directly from your CRM. After the mailing is sent, response data from recipients (openings, clicks, direct replies, unsubscriptions and outbounces, see Response data) are automatically imported into your Salesforce CRM.

To send campaign mailings, you need to:

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 your Salesforce CRM

Perform the following steps:

Prepare a Smart Campaign and mailing in Episerver Campaign

The Smart Campaign that you prepare in Episerver Campaign must at least have the following three nodes:

1. A **Recipients** node, to which you assign the master recipient list of the closed-loop interface

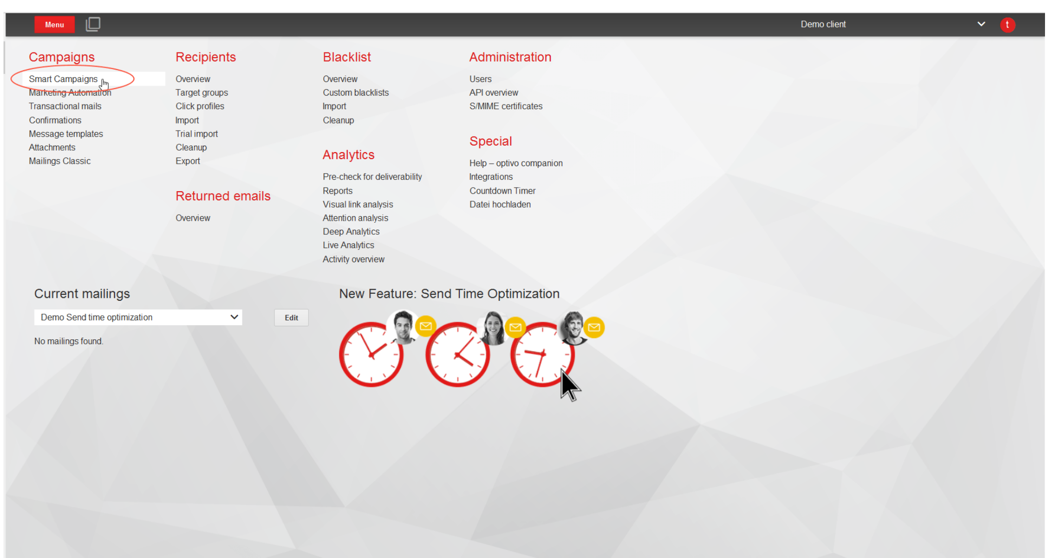
> The Salesforce integration links your CRM to our closed-loop service. Our customer service team sets up a so-called *master recipient list* when your client is configured.

2. A **Wait** node, in which you enable the **Wait until import has been finished** option
3. A message node which contains the mailing to be sent

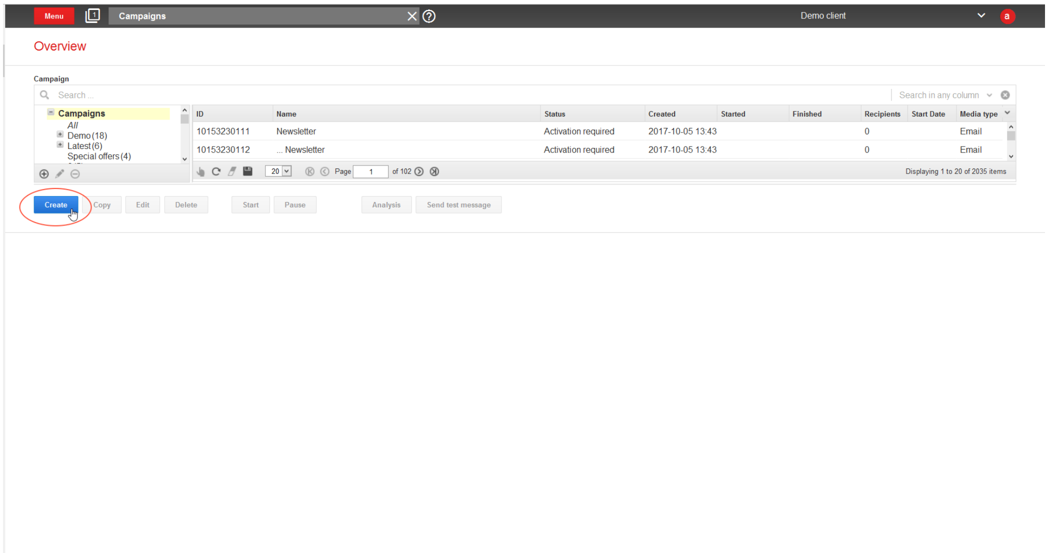
> The Salesforce integration supports the following media types: email, SMS, and fax.

To meet the Smart Campaign's minimum configuration requirement of three nodes, perform the following steps:

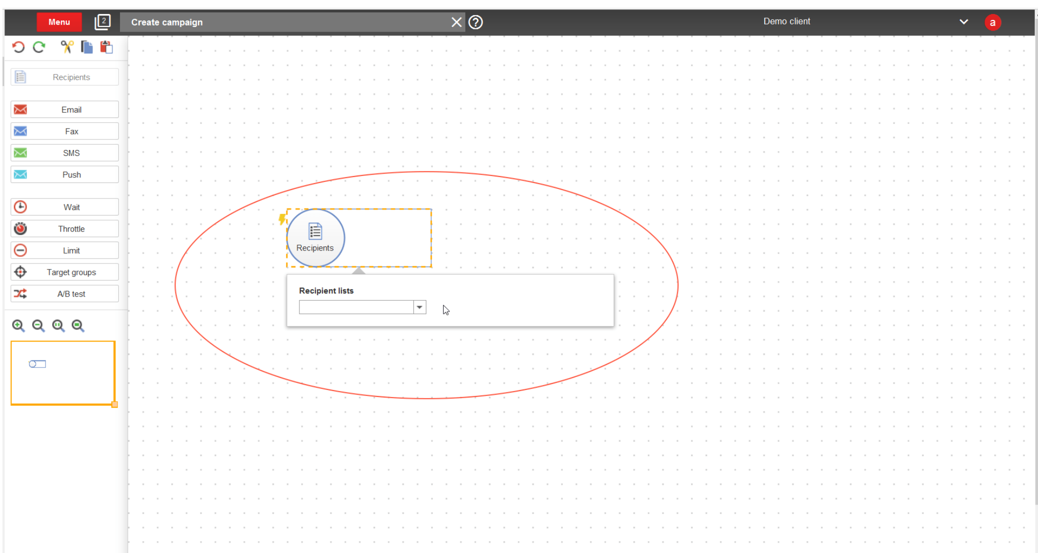
1. Log in to Episerver Campaign.
2. In the start menu, under **Campaigns**, click **Smart Campaigns**. The Campaigns window opens.



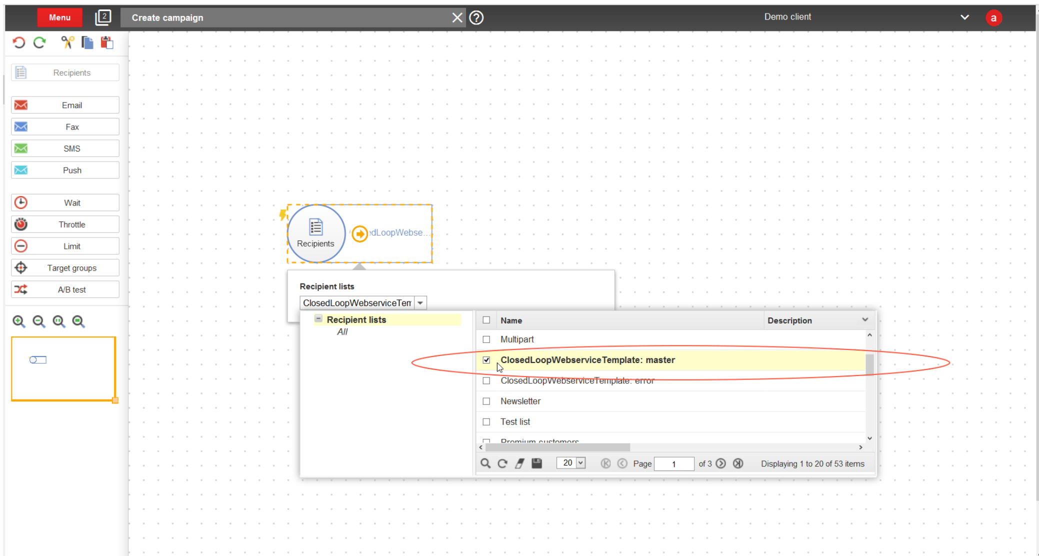
3. Click **Create**. The Create campaign window opens.



4. Drag the **Recipients** node from the left action area to the working area on the right. A context menu opens in the **Recipients** node.

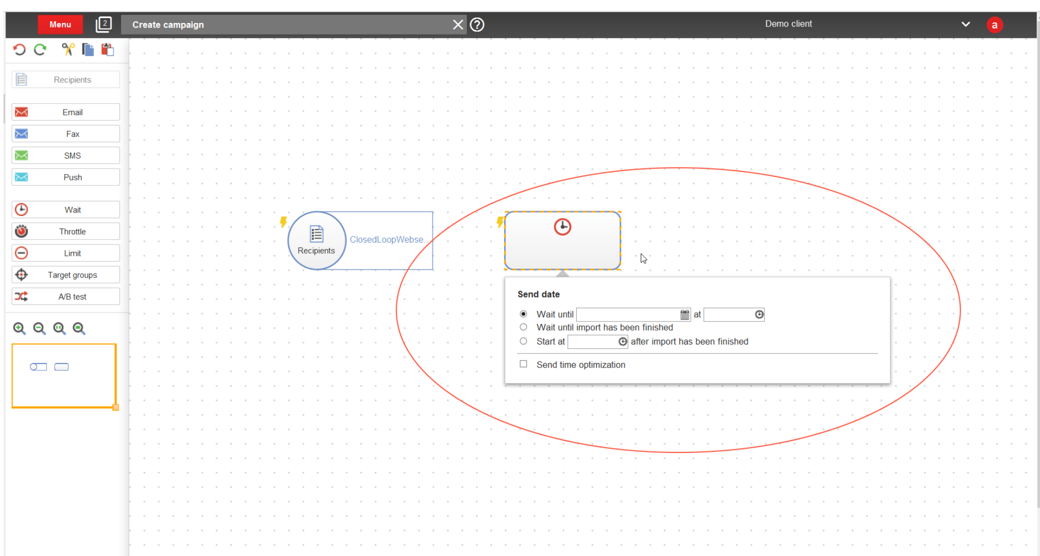


5. In the **Recipient lists** drop-down list of the context menu, select the master recipient list of the closed-loop interface by selecting the respective check box.

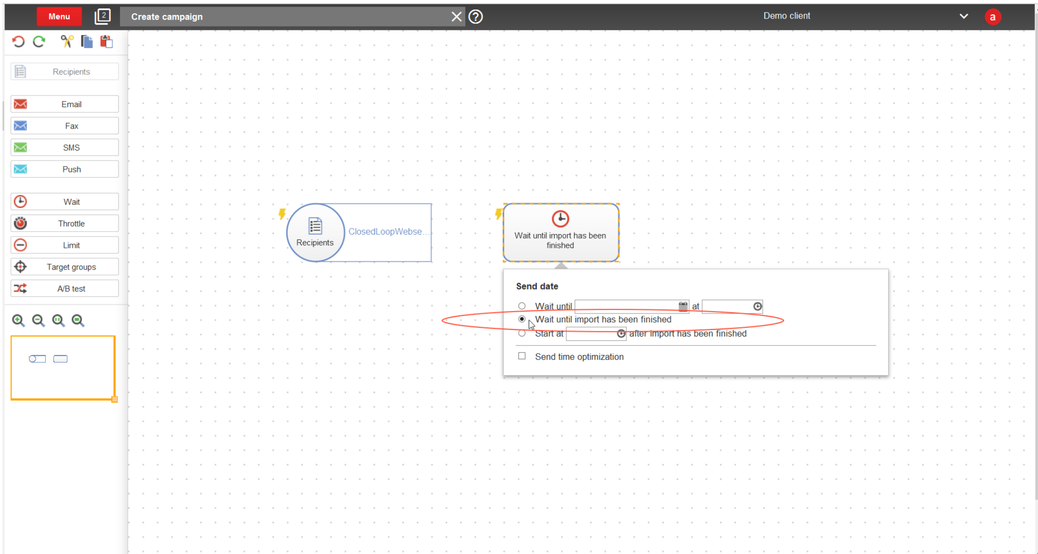


Our customer support team created a master recipient list for the closed-loop interface when the Salesforce integration was set up in your client. Only use this master recipient list, not any other recipient list.

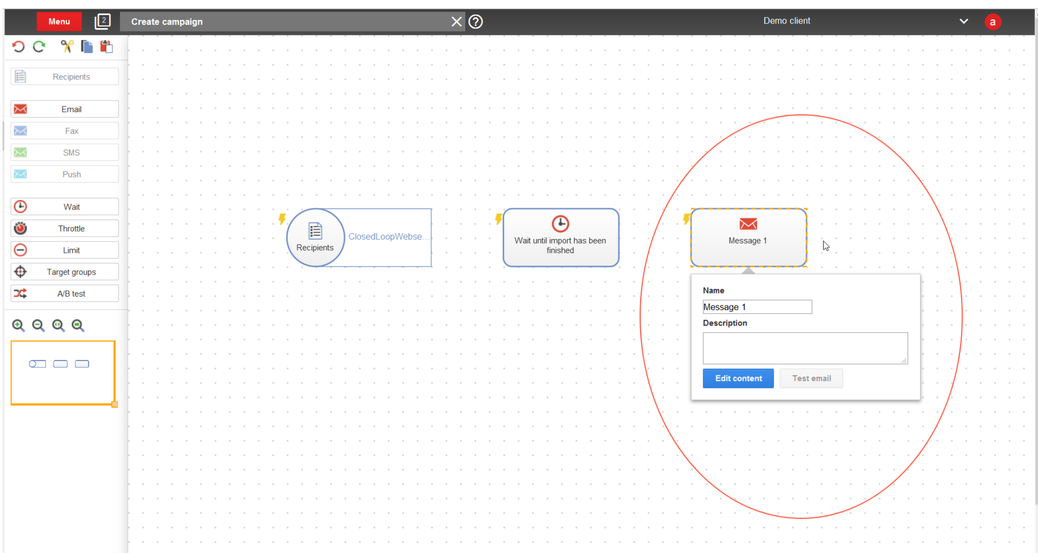
6. Drag the **Wait** node from the left action area to the working area on the right. A context menu opens in the **Wait** node.



7. In the context menu, enable the option **Wait until import has been finished**.



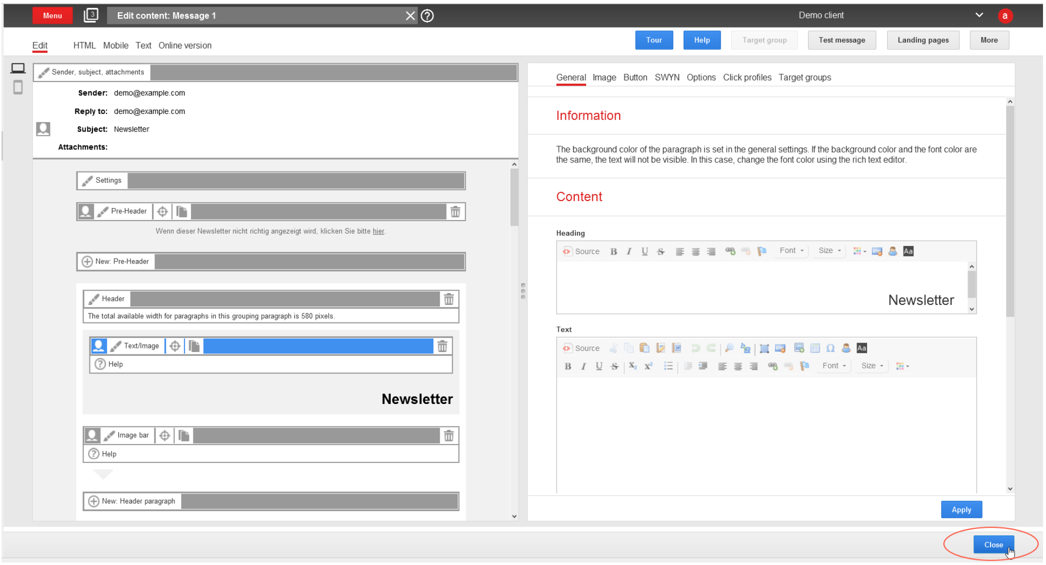
8. Drag a message node (**email**, **fax**, **SMS**) from the left action area to the working area on the right. A context menu opens in the message node.



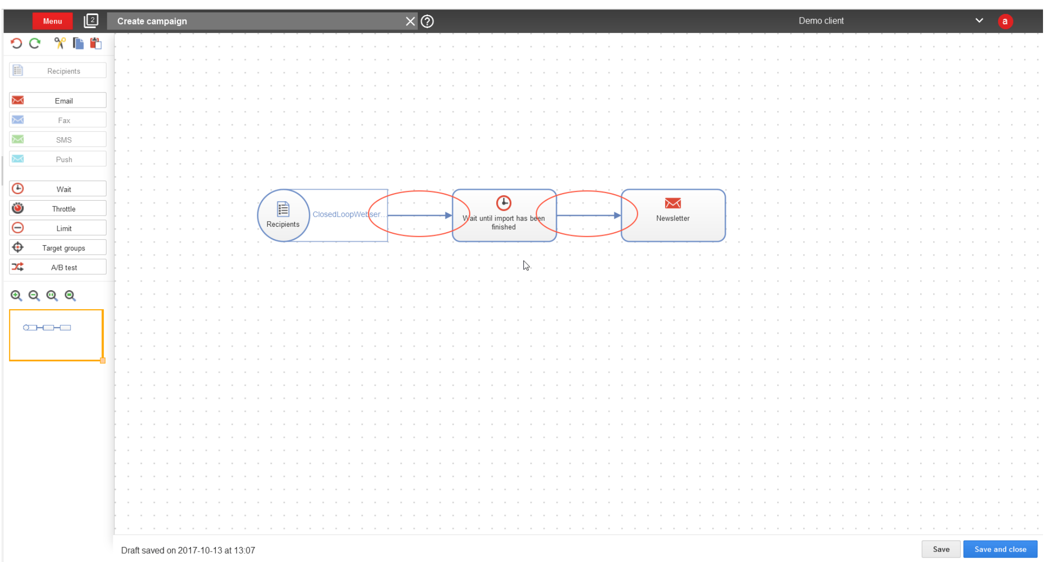
9. Click **Edit content**, select a template and insert your message content into the mailing.

You can design your mailing as usual, using all available tools and features. Detailed instructions on how to design mailings can be found here: **Edit mailing content**.

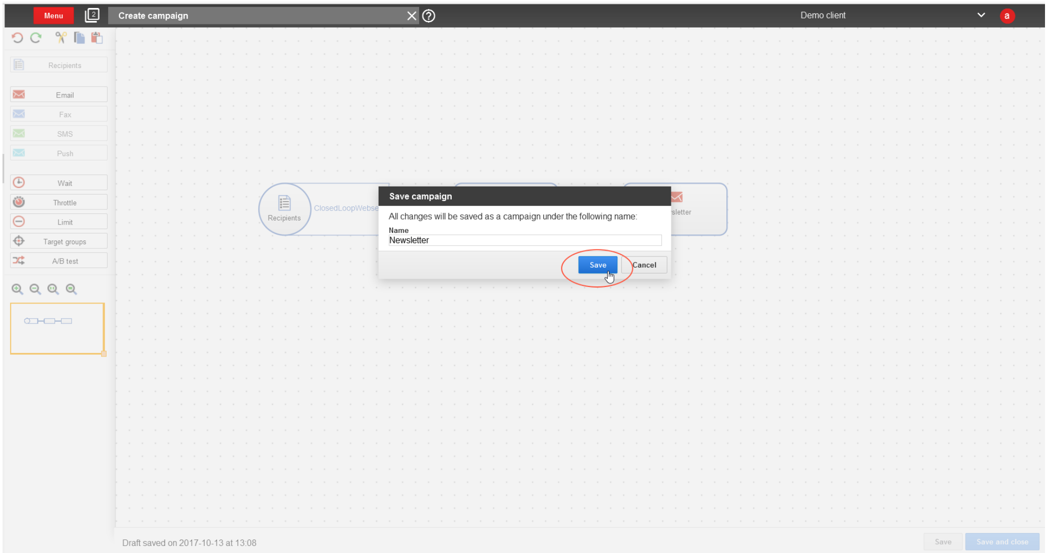
10. After you insert your message content, click **Close**. The working area with the campaign nodes opens once again.



11. Connect the campaign nodes.



12. Click **Save and close**, enter a campaign name and click **Save**.



You have successfully prepared a campaign and mailing in Episerver Campaign for the Salesforce integration.

Do not activate the campaign or manually send it. If you activate the campaign and/or manually send it, starting and sending the campaign from your Salesforce CRM is no longer possible.

If you start and send your campaign mailing from your Salesforce CRM at a later point, the campaign mailing is automatically duplicated. If required, you can delete the original in Episerver Campaign after it was sent.

Create a CRM campaign and add members

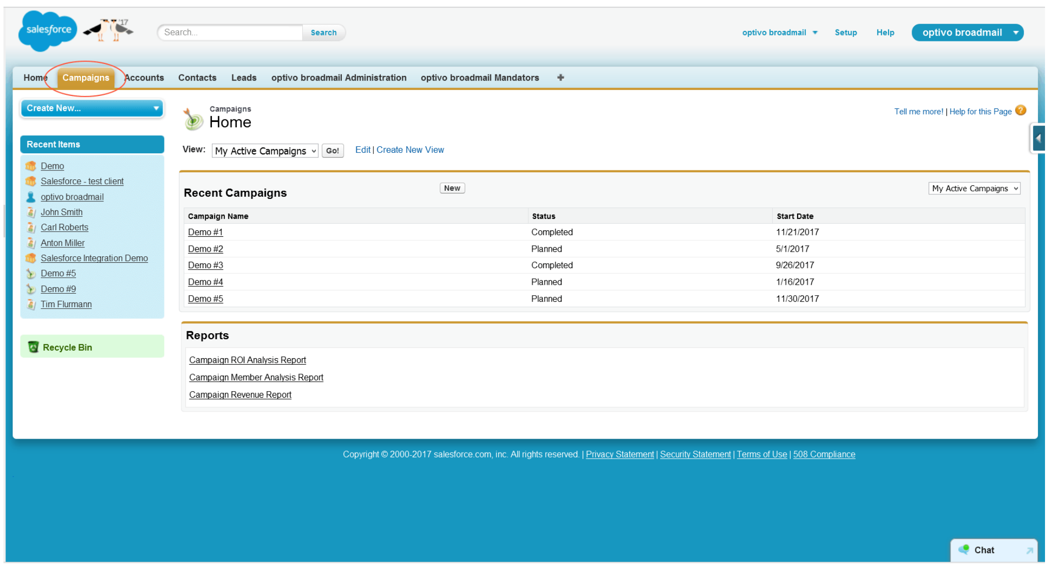
After you prepare a campaign and mailing in Episerver Campaign, the next step is to create a CRM campaign in Salesforce and assign members to this campaign.

The CRM campaign in Salesforce controls the Smart Campaign you 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.

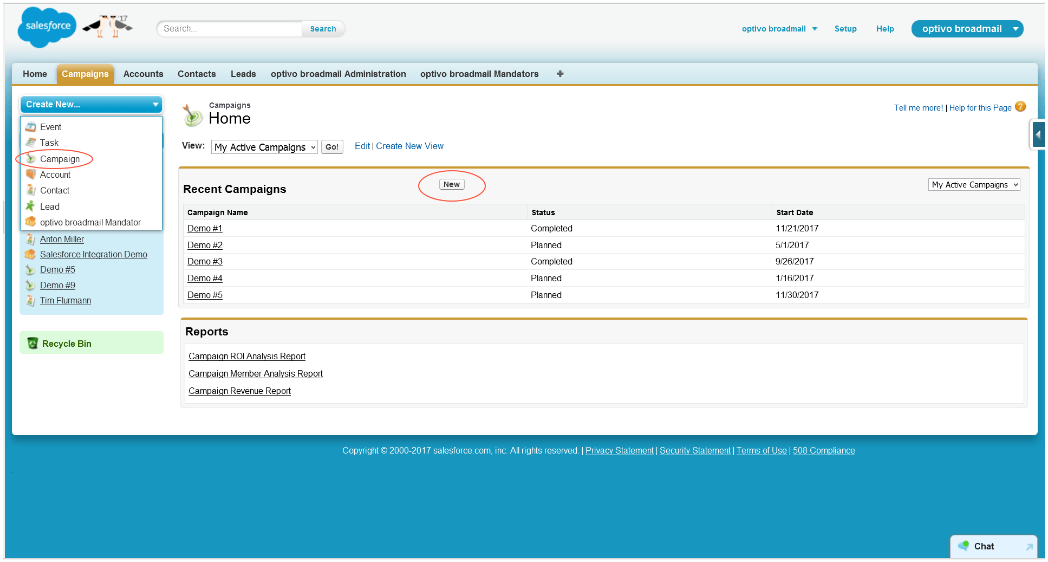
To create a CRM campaign and assign members, proceed as you usually do; all of the regular features in Salesforce will be available. The steps below are an example and show one possible approach.

Perform the following steps:

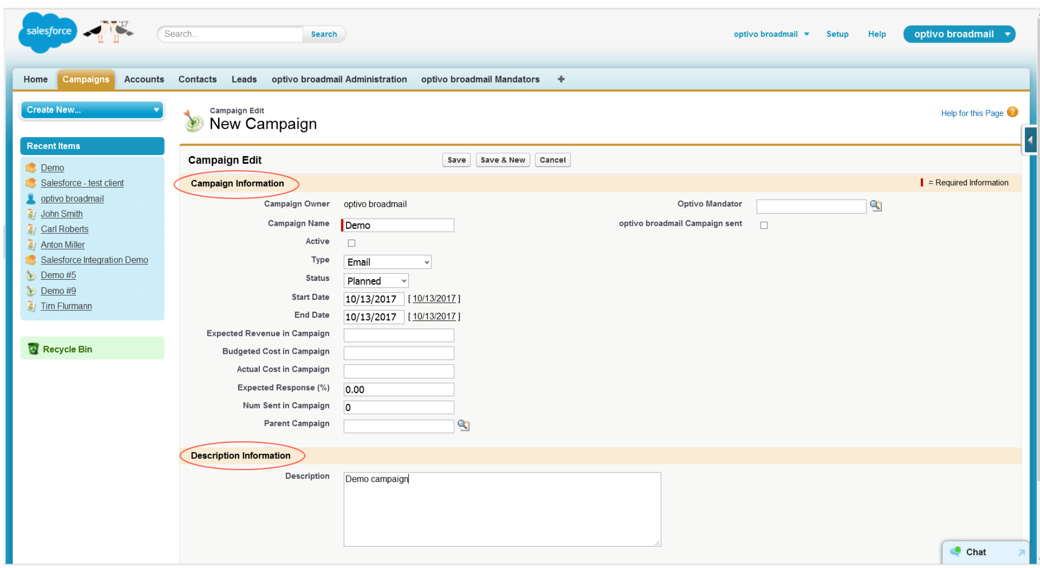
1. Log in to your Salesforce CRM.
2. In the menu bar, click **Campaigns**. The Campaigns - Home window opens.



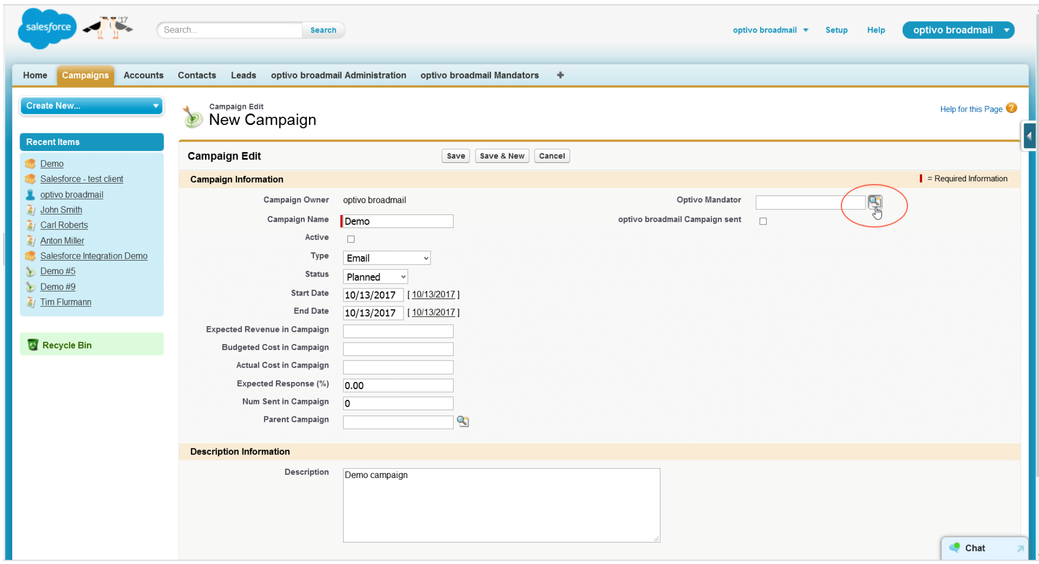
3. Click **New** or, in the **Create New...** drop-down list (in the left menu), select **Campaign**. The Campaign Edit - New Campaign window opens.



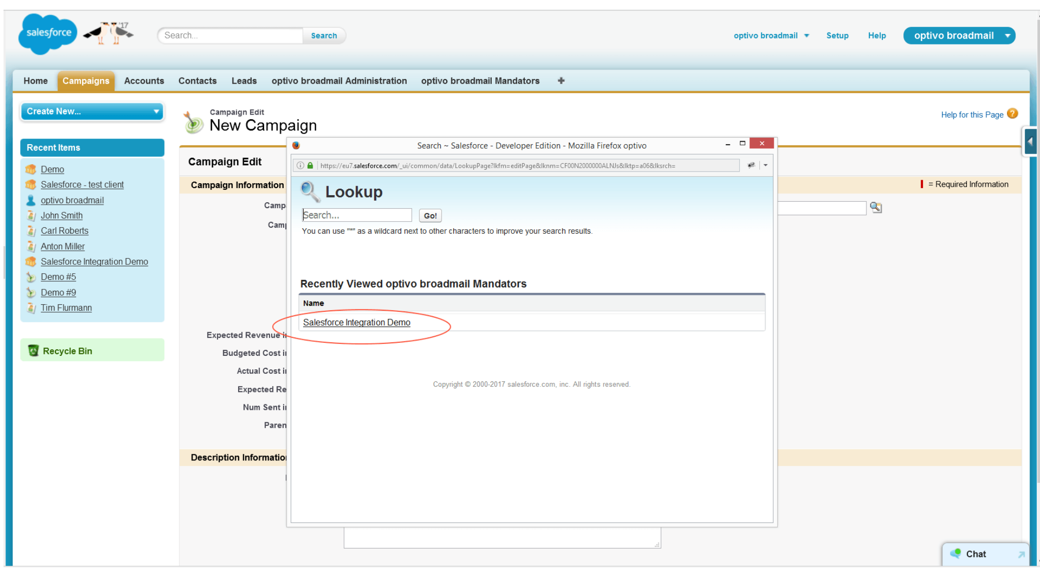
4. Enter the campaign information and description information according to your requirements.



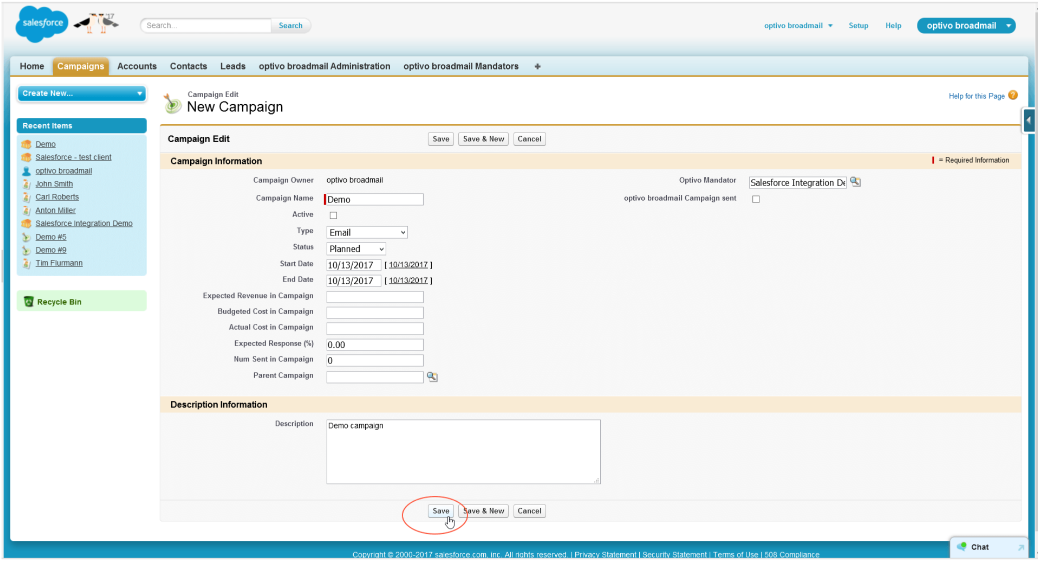
5. Click the magnifying glass icon next to the **Mandator** field. The Lookup window with the previously set up Episerver Campaign clients opens.



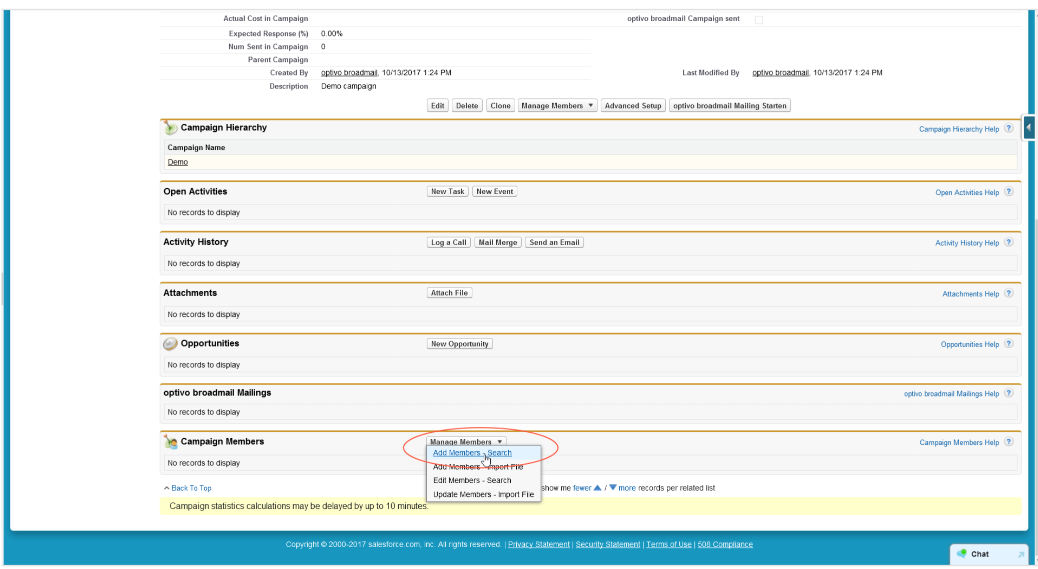
6. Click the client in which you prepared the mailing you wish to send. The Lookup window closes.



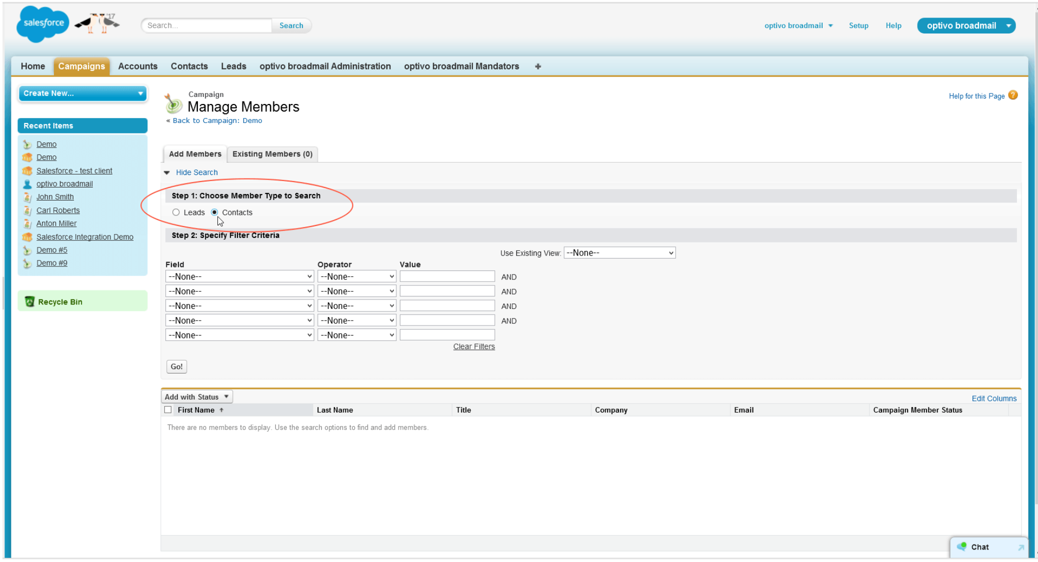
7. Click **Save**. The Campaigns - <Your campaign name> window opens.



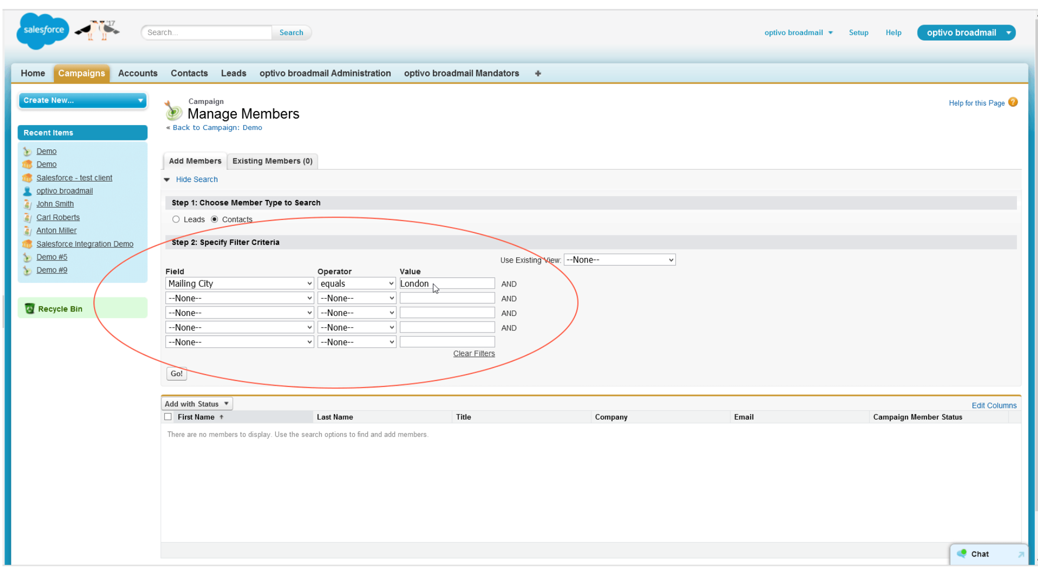
8. In the Campaign Members area, select the option **Add Members - Search** in the **Manage Members** selection list. The Campaign - Manage Members window opens.



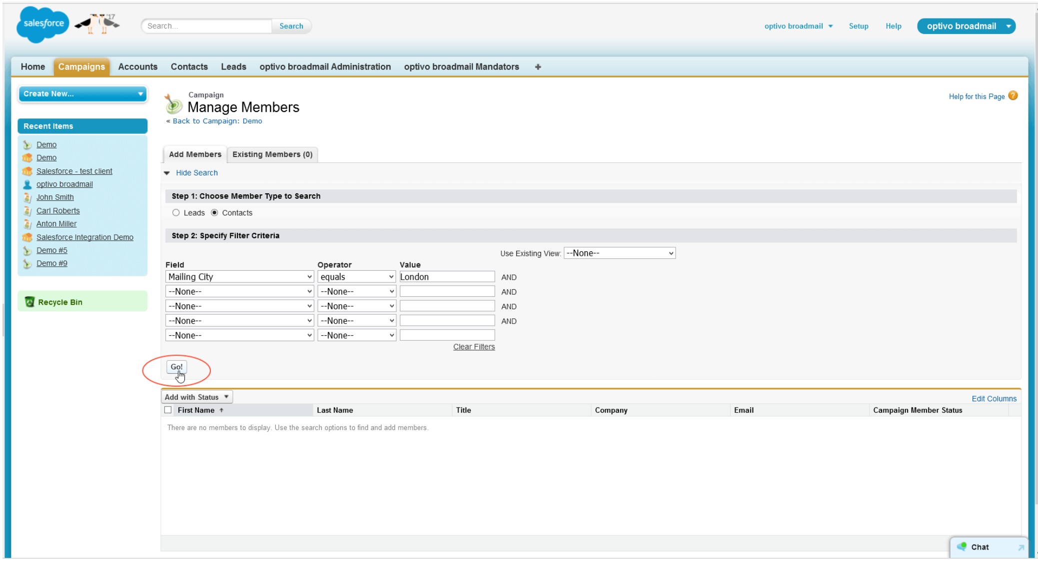
9. Under Step 1, enable the option **Leads** or **Contacts** - depending on what contact type you would like to add to the campaign.



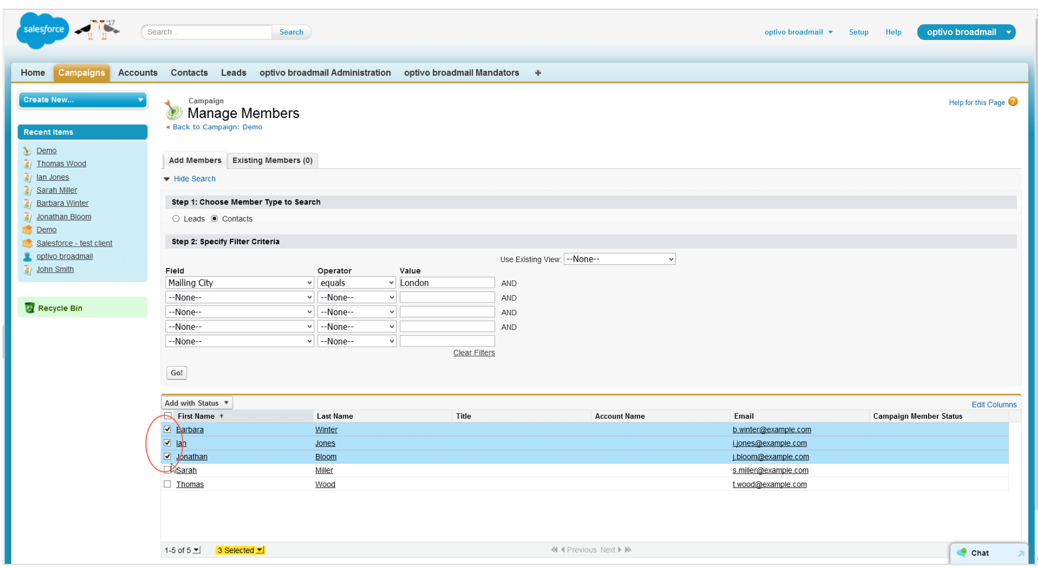
10. Under Step 2, select the filter criteria you would like to use to narrow down campaign members, e.g. one customer group, customers from a specific state, customers within a certain age range or with specific interests, etc.



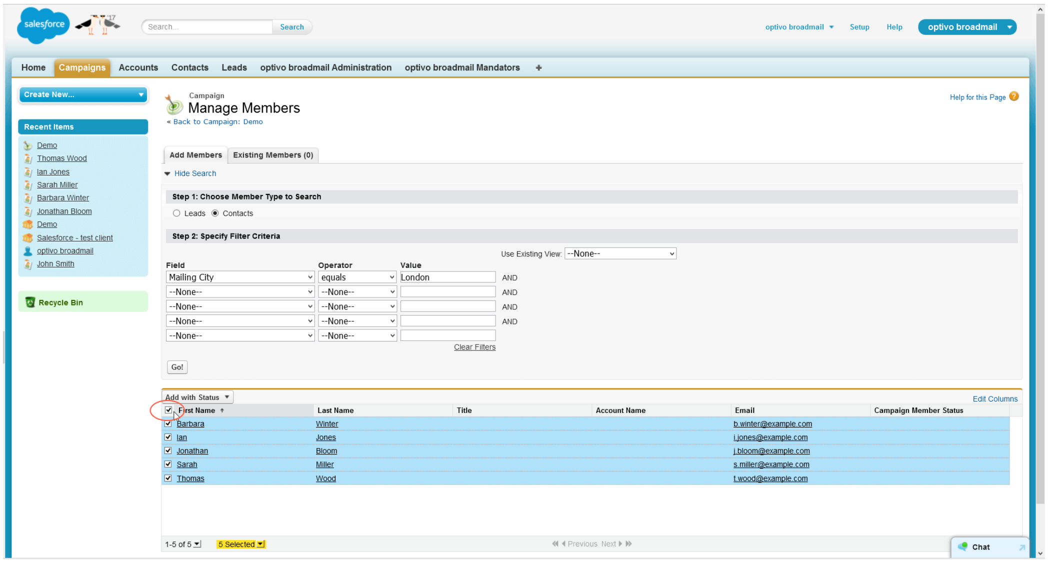
11. To apply the selected filter criteria, click **Go!**. The contacts/leads to which the selected filter criteria apply are displayed.



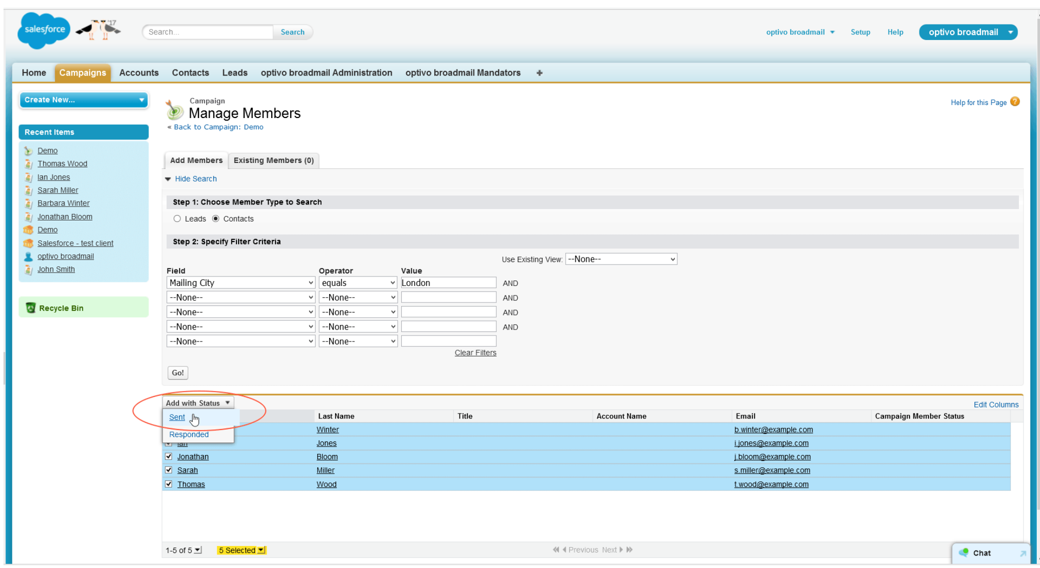
12. Select the check box next to the contacts/leads you wish to include in the mailing.



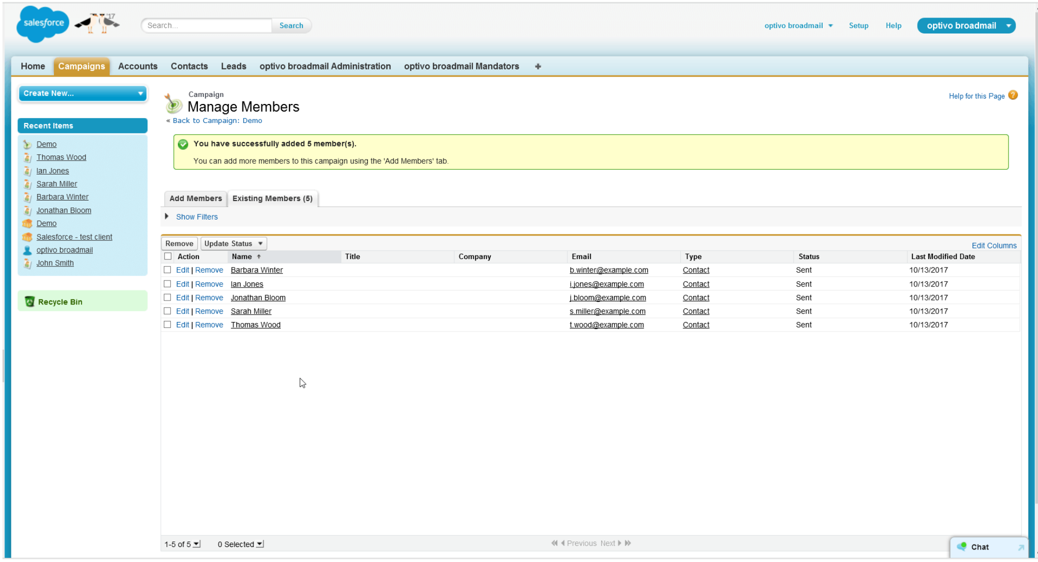
To select all listed contacts/leads with one click, select the check box next to the column heading.



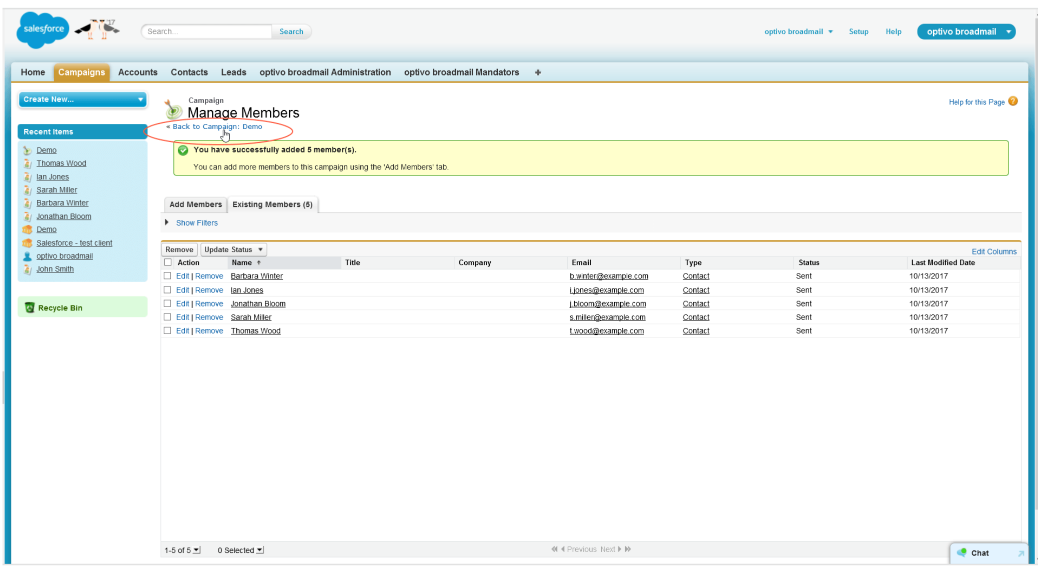
13. In the **Add with Status** drop-down list, select the **Sent** option. The selected contacts/leads are added to the campaign.



The Campaign – Manage Members window opens.



14. If you would like to add additional contacts/leads, switch to the Add members tab and perform a new search, using the respective filter criteria. If you do not want to add any other contacts/leads, you can exit the window. Click **Back to Campaign: <Your campaign name>**.



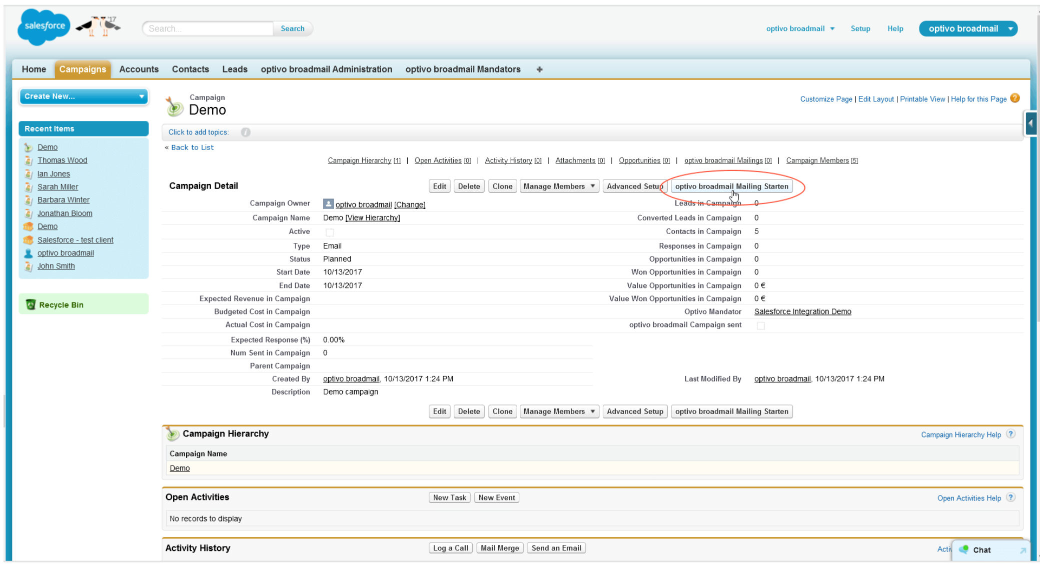
You have successfully added all of the members that are supposed to be included in your Episerver Campaign mailing to your campaign and returned to the Back to Campaign: <Your campaign name> window.

Do not close this window as you will need this screen for the next step Start dispatch of the Episerver Campaign mailing.

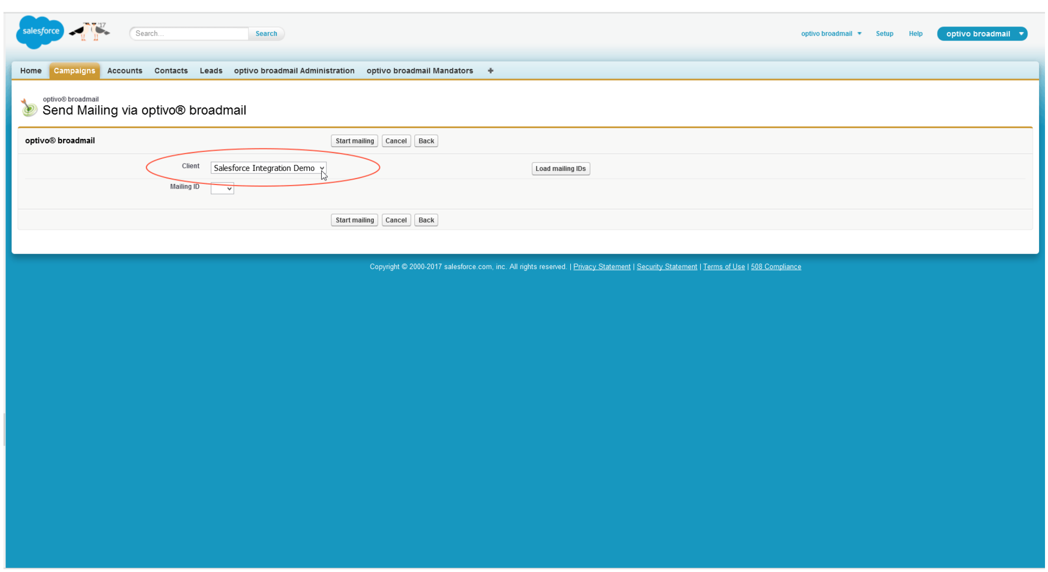
Start dispatch of the Episerver Campaign mailing

To start the dispatch of the Episerver Campaign mailing from your Salesforce CRM, perform the following steps:

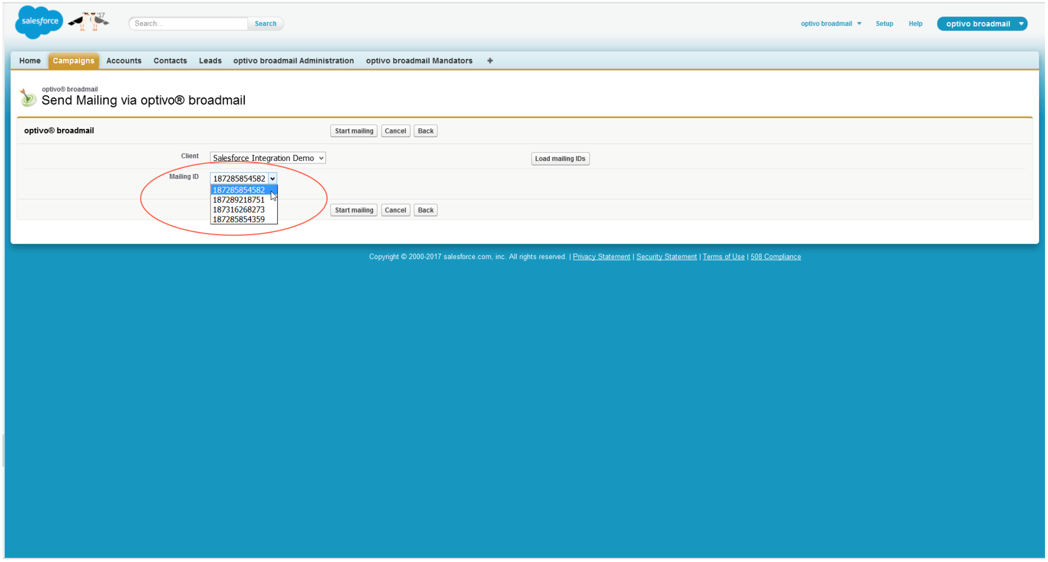
1. In the Campaign: <Your campaign name> window, click Episerver Campaign **Mailing Starten** (**Start** Episerver Campaign **mailing**). The Send Mailing via Episerver Campaign window opens.



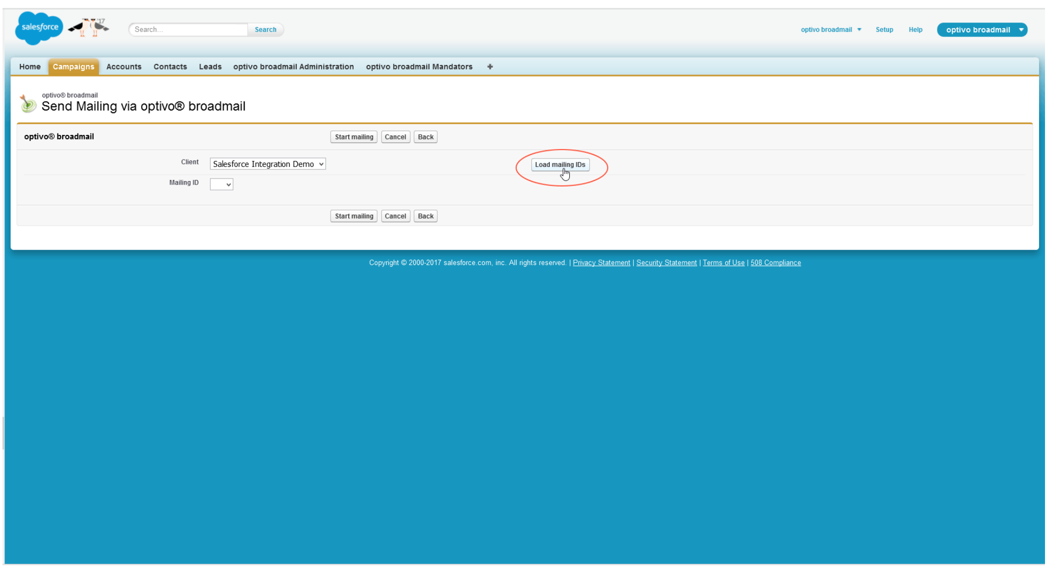
2. Make sure that the correct Episerver Campaign client is selected under **Client** - change the client using the drop-down list, if required.



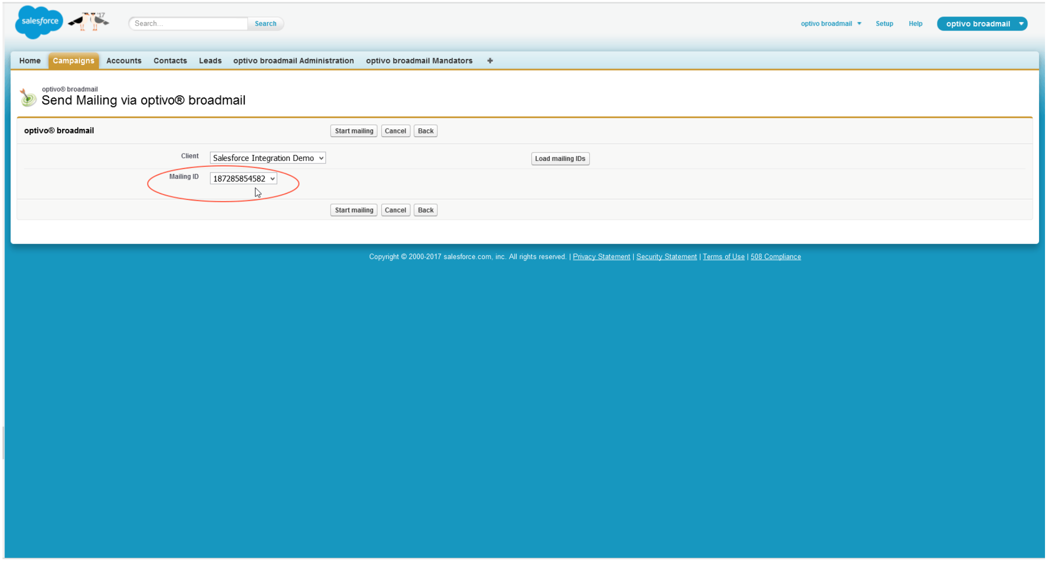
3. Click **Load mailing IDs**.



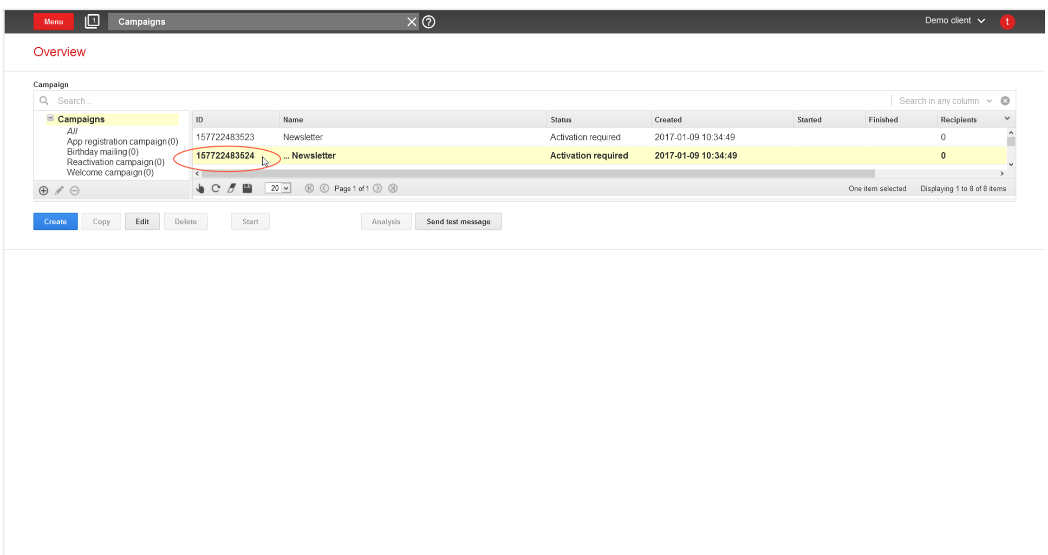
The Mailing ID selection list loads the mailing ID of the Episerver Campaign mailing you prepared. If you prepared multiple mailings in Episerver Campaign, the IDs for all available mailings are loaded.



4. If you prepared multiple mailings in Episerver Campaign, proceed as follows: Select the ID for the mailing that you wish to send from the **Mailing ID** drop-down list.

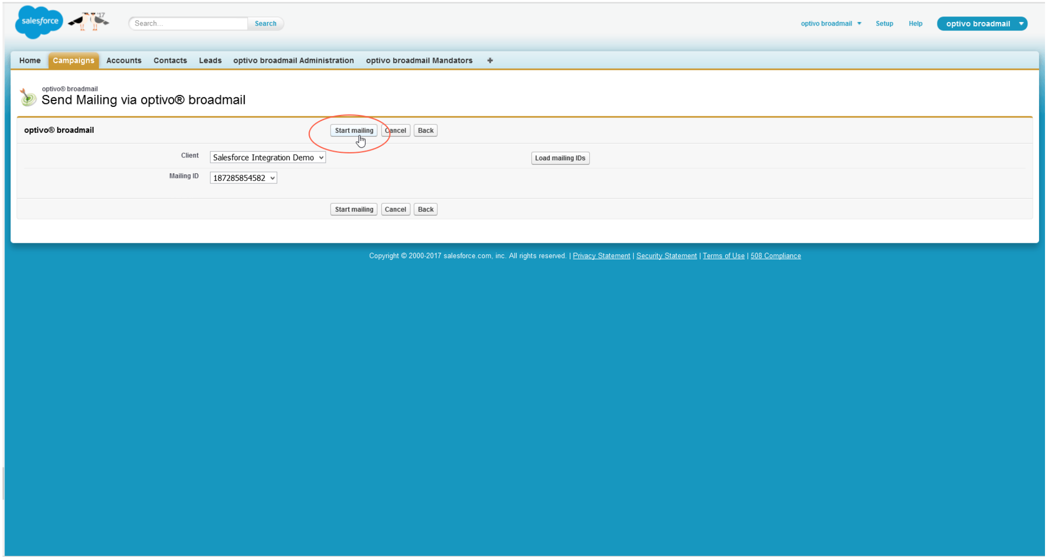


If you are unsure which ID belongs to which mailing, you can look up the individual mailing IDs in Episerver Campaign. Open the Episerver Campaign start menu and, under **Campaigns**, click **Smart Campaigns**. Copy the relevant mailing ID from the ID column of the campaigns overview.

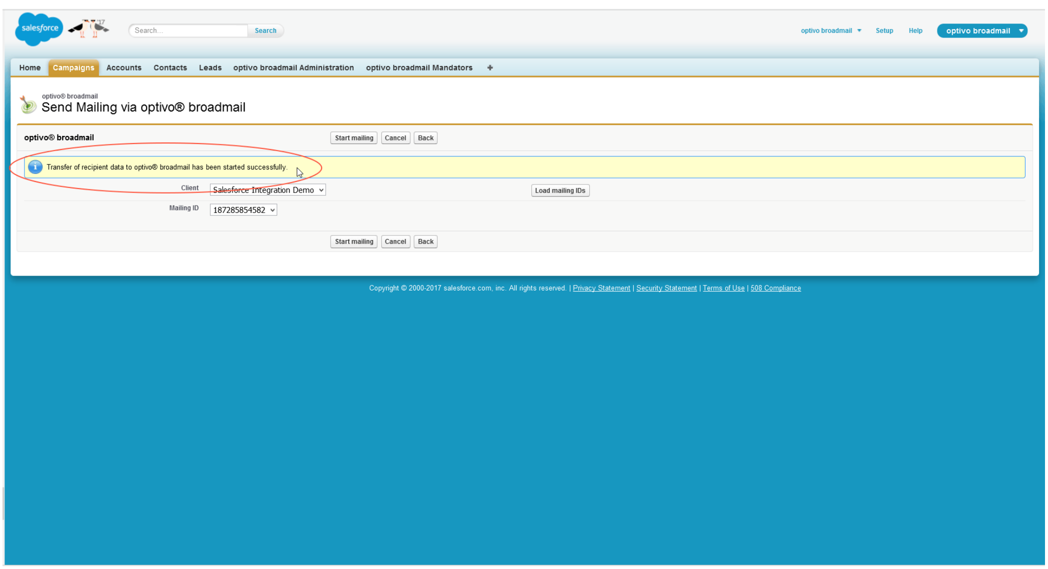


Do not confuse the campaign ID with the mailing ID. Mailings are always indented in the list and the mailing name is preceded by three dots.

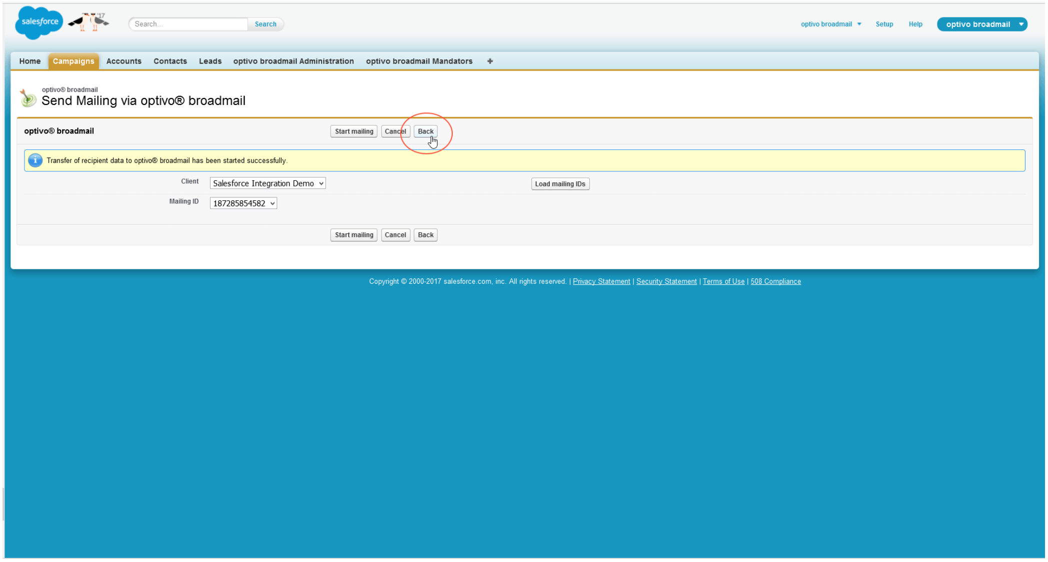
5. To start dispatch of the mailing and the transfer of the contacts/leads that are to be included in the mailing, click **Start mailing**.



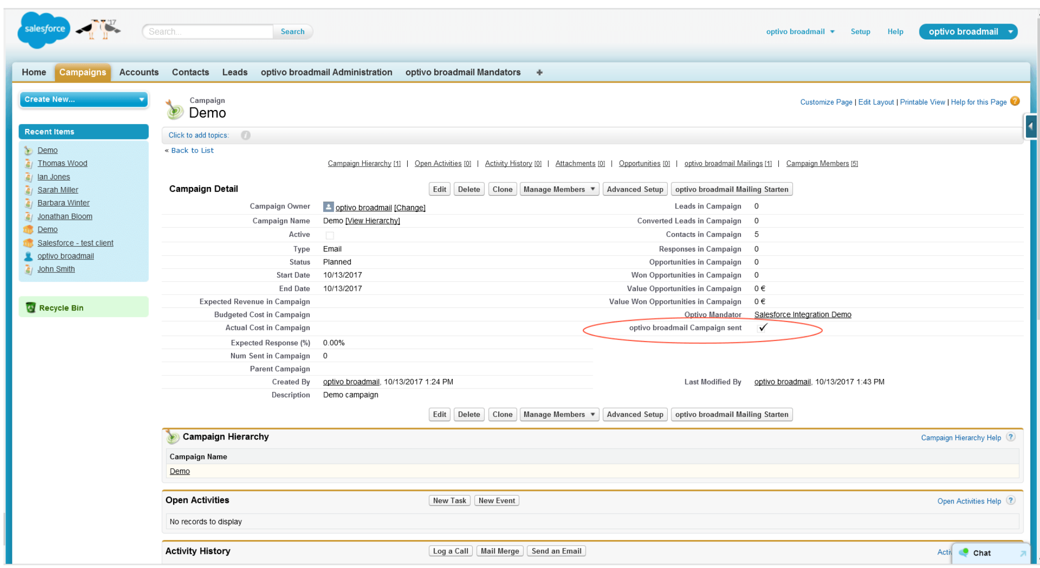
The contacts/leads that you added to you CRM campaign as members are transferred to Episerver Campaign. The message *Transfer of recipient data to Episerver Campaign has been started successfully* is displayed.



6. To check the current dispatch status for the mailing, click **Back**. The Campaigns - <Your campaign name> window opens.



7. Check Episerver Campaign **Campaign sent** for the current dispatch status. If the check box is not selected, the mailing has not yet been sent. A selected check box means that the mailing has been sent successfully.



Depending on the system load, it may take a few minutes for the mailing to be sent.

Response data

After an Episerver Campaign mailing has been sent, Salesforce automatically imports the response data from your contacts and leads to your CRM. The CRM campaigns, campaign members and contacts/leads detail pages provide you access to the following data:

- dispatch status of the mailing
- openings
- clicks
- outbounces
- unsubscriptions
- direct replies

The response data of your contacts/leads is not transferred to Salesforce in real time. This data import may be delayed by several hours.

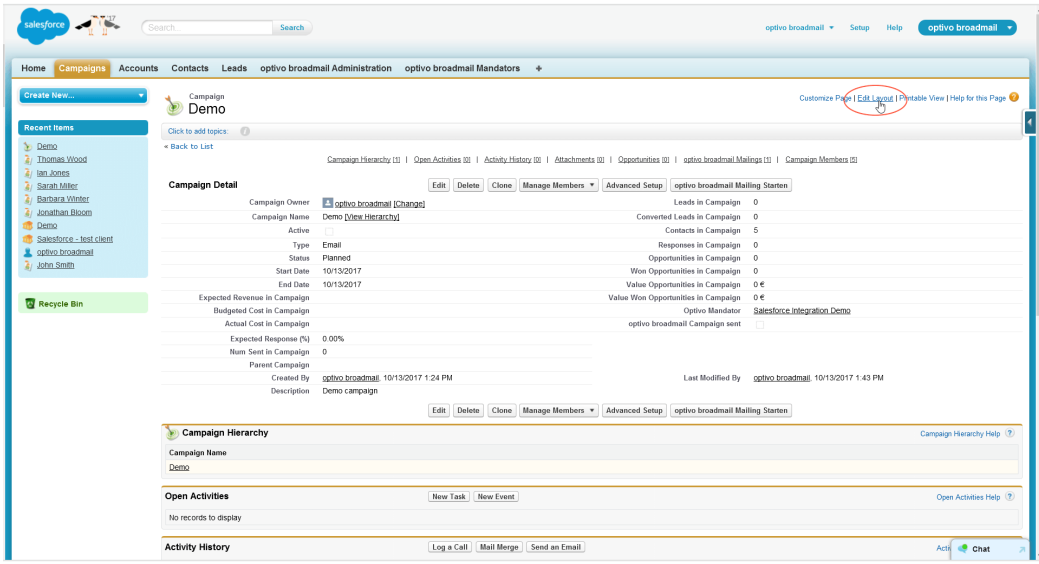
Configure the page layout to display response data

To receive information on the dispatch status, openings, clicks and direct replies on the CRM campaigns detail pages, you must first configure the page layout of the campaign detail pages and add fields for the individual data elements. Perform the following steps:

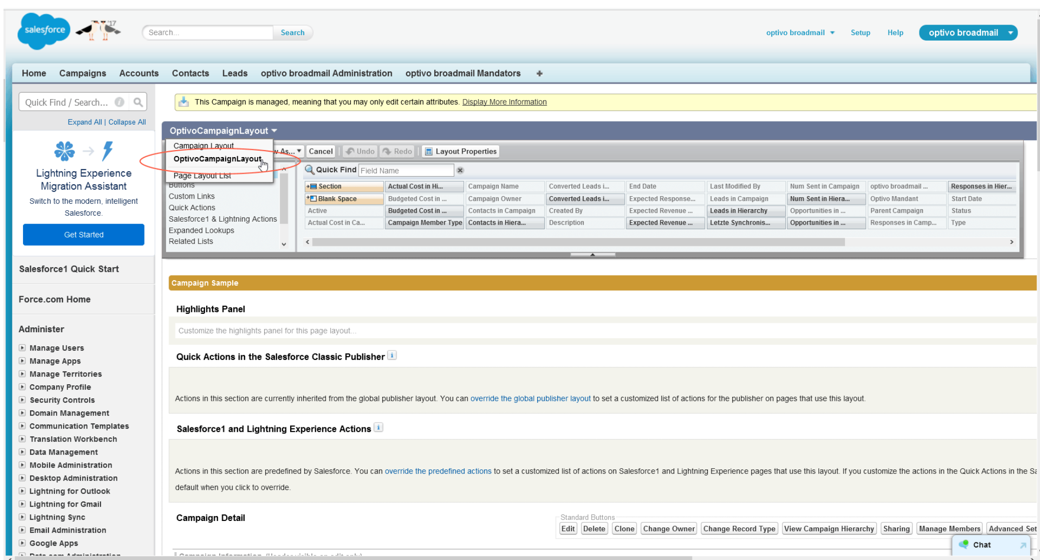
1. Log in to your Salesforce CRM.
2. In the menu bar, click **Campaigns**. The Campaigns - Home window opens.
3. Select a campaign by clicking the campaign name.

   To configure the page layout, you can select any campaign. The configuration is applied globally and can be implemented on any campaign detail page. The Campaigns – <Your campaign name> window opens.

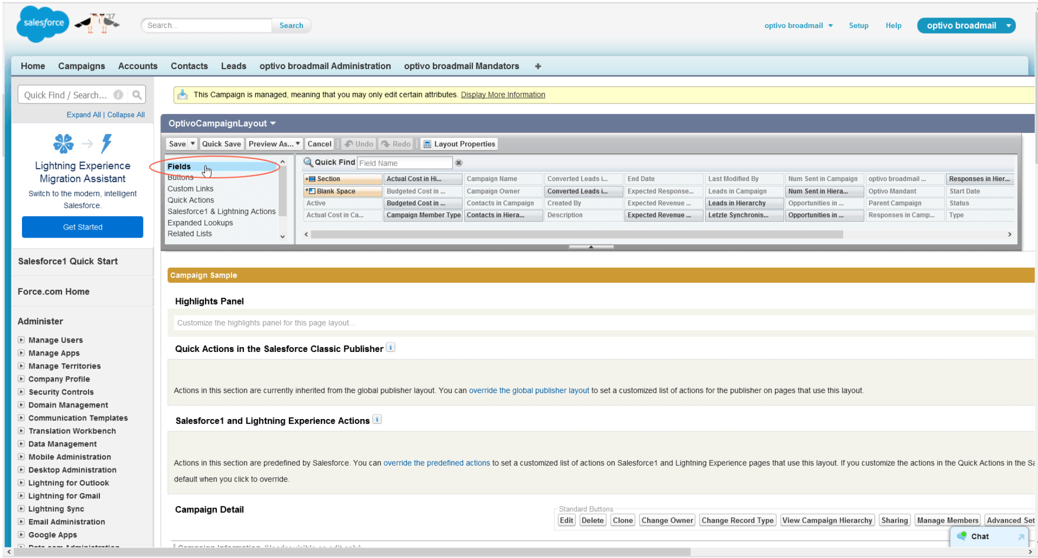
4. Click **Edit Layout**. The layout configuration opens.



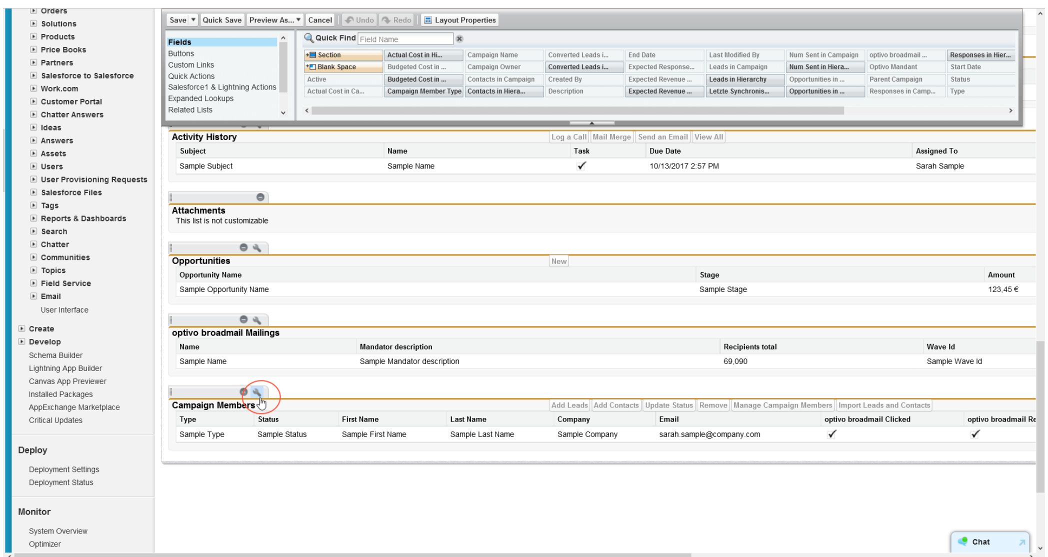
5. In the menu bar of the option menu, select the entry **OptivoCampaignLayout**.



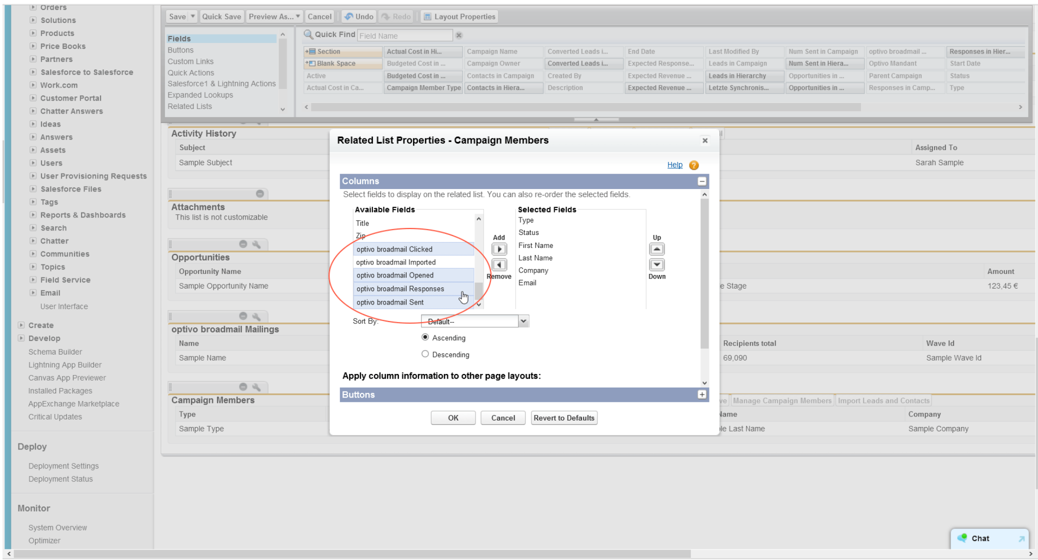
6. In the option menu list, click **Fields**.



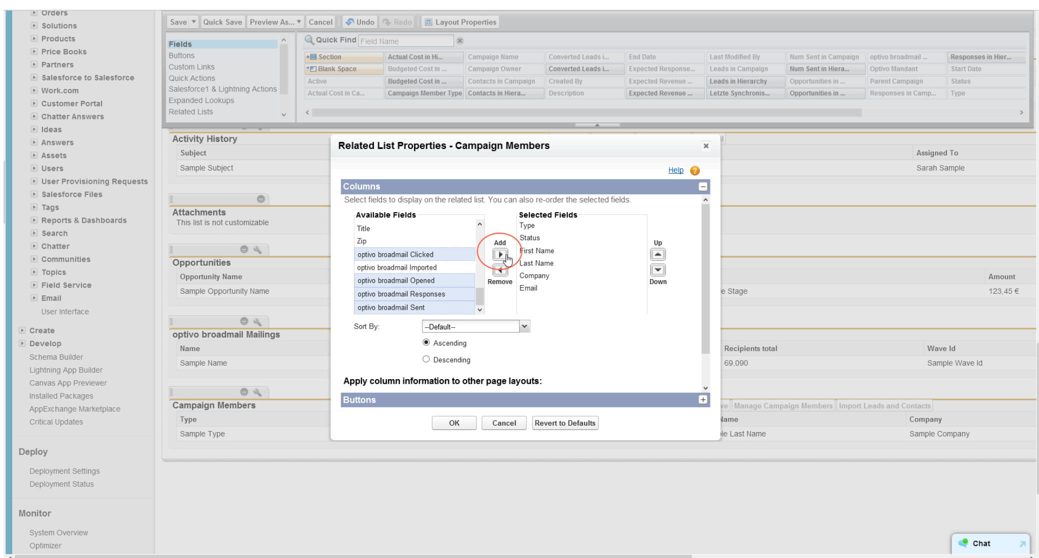
7. Scroll down to the **Campaign Members** area and click the tool icon. The Related List Properties - Campaign Members window opens.



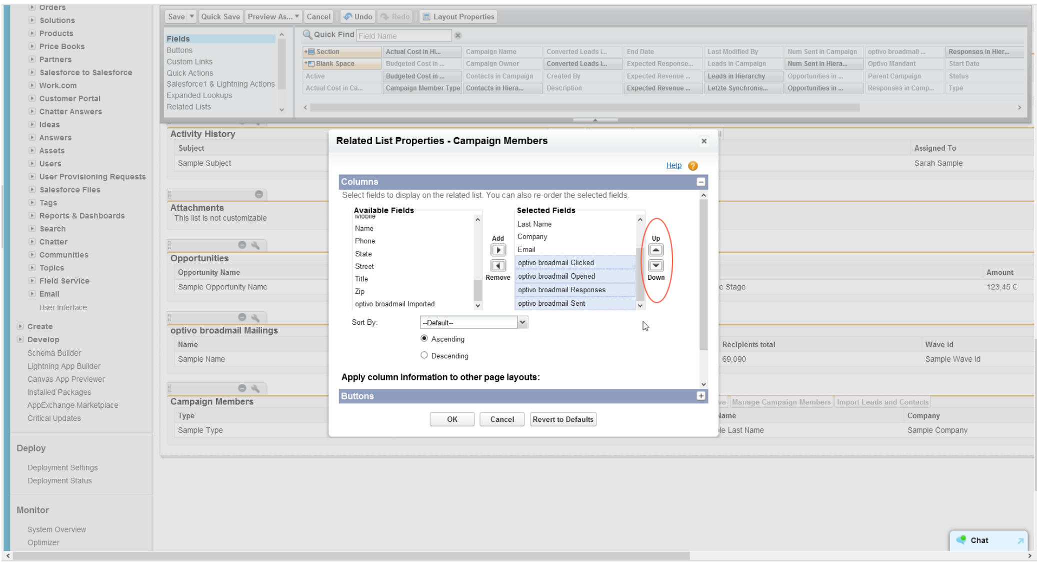
8. Press and hold down **the** Ctrl key and, under **Available Fields**, highlight **Sent**, **Opened**, **Clicked** and **Responses**.



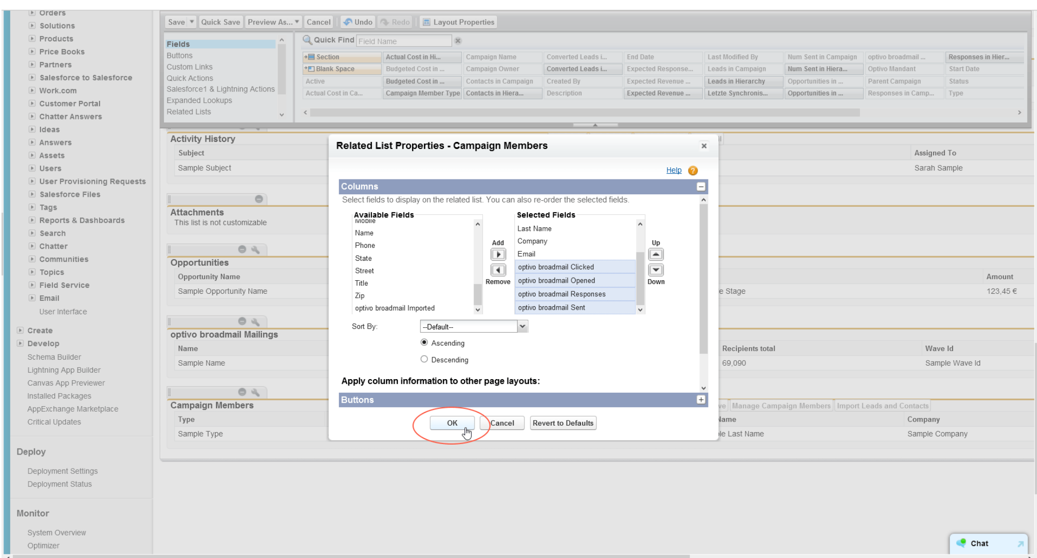
9. Click **Add**.



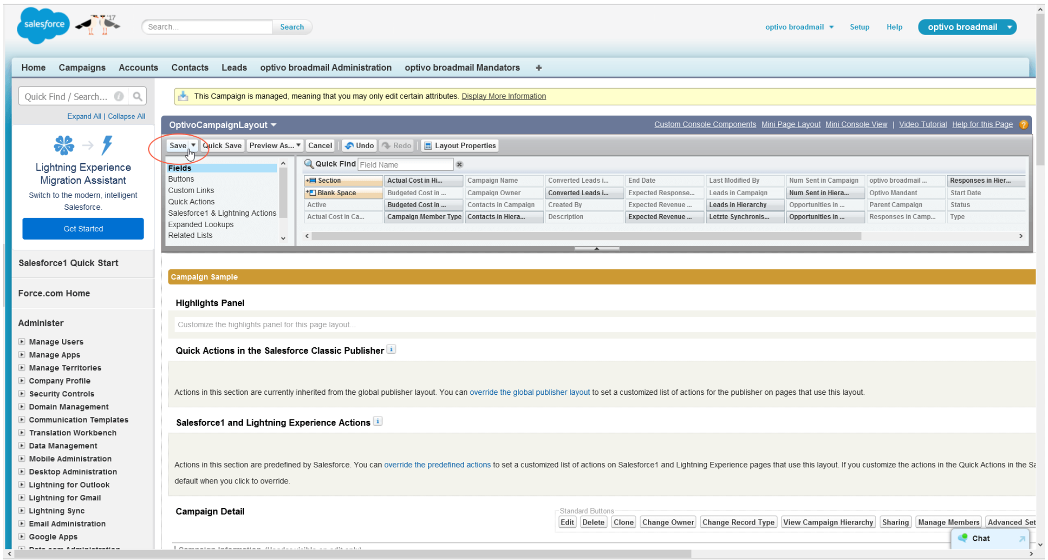
The selected data fields are added to the **Selected Fields** list. If required, you can change the order of the data fields using the **Up** and **Down** buttons.



10. Click **OK**.



11. In the option menu, click **Save**.



You have successfully configured the page layout of the campaign detail pages to display the dispatch status, openings, clicks and direct replies.

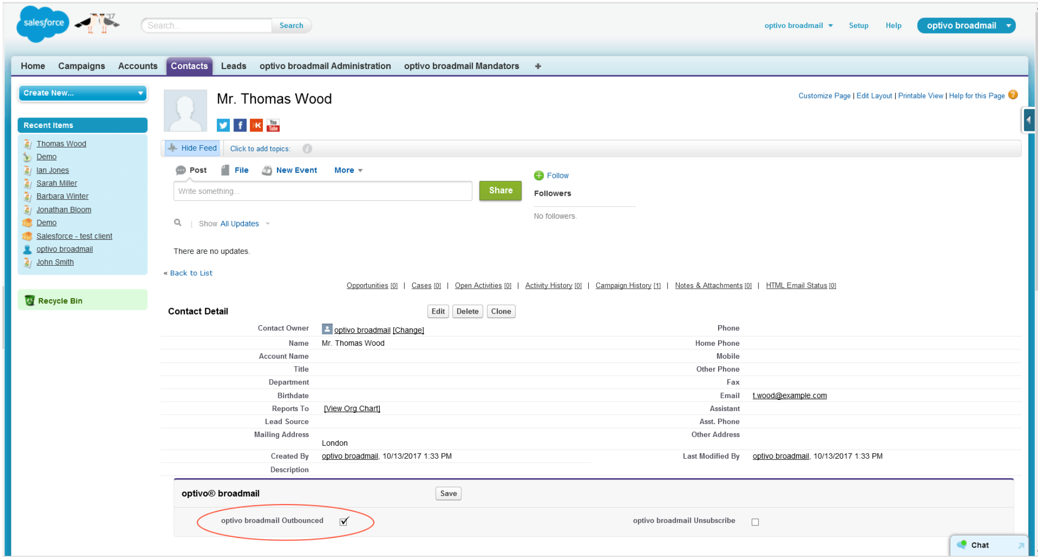
Bounces and unsubscriptions

To check in your Salesforce CRM whether the bounce limit has been exceeded for a contact/lead or whether a contact/lead has unsubscribed from your mailings, perform the following steps:

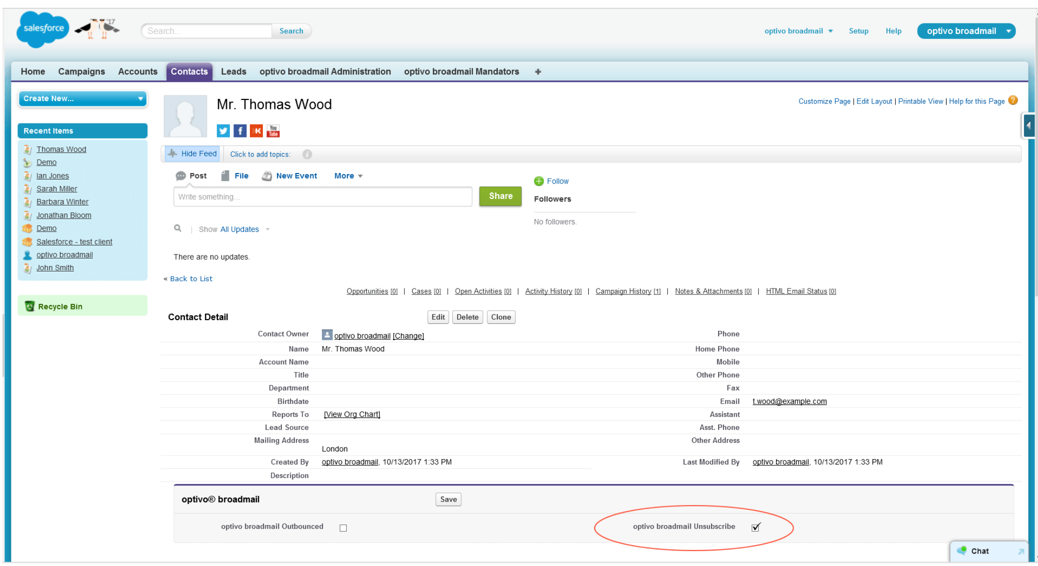
1. Log in to your Salesforce CRM.
2. In the menu bar, click **Contacts** or **Leads**. The Contacts - Home or Leads - Home window opens.
3. Select the contact/lead for which you would like to obtain information and click on the name of the respective contact/lead. A window containing details for the contact/lead opens.
4. Under **optivo broadmail**, you can check whether the bounce limit has been exceeded for a contact/lead or whether a contact/lead has unsubscribed from your mailings.

   If a contact/lead has exceeded the bounce limit, the check box next to **Outbounced** is ticked.

   Messages can no longer be sent to this contact/lead.



If a contact/lead has unsubscribed from your mailings, the check box next to **Unsubscribe** is ticked. This contact/lead is no longer transferred to Episerver Campaign.



Dispatch status, openings, clicks and direct replies

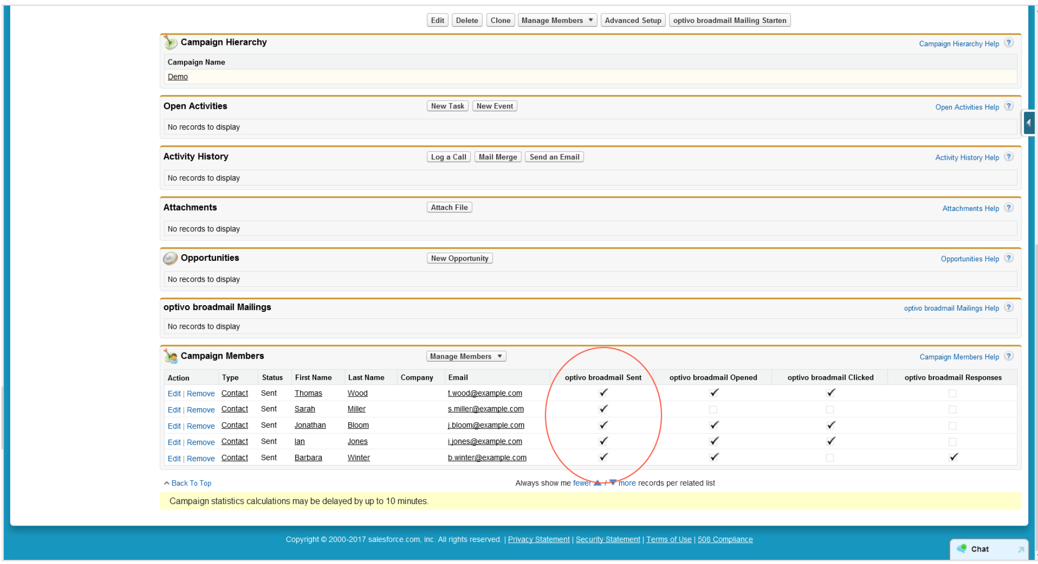
On the campaign and campaign member detail pages you can check whether:

- A mailing was sent to a contact/lead
- A contact/lead has opened your mailing
- A contact/lead has clicked on one or several links in your mailing
- A contact/lead has replied directly to your mailing

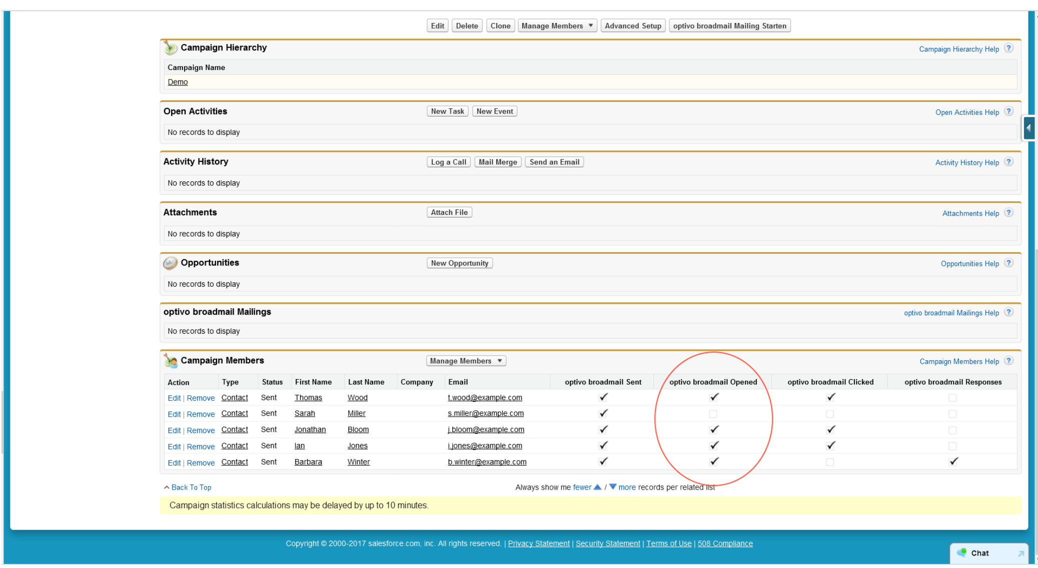
To obtain this information, perform the following steps:

1. Log in to your Salesforce CRM.
2. In the menu bar, click **Campaigns**. The Campaigns - Home window opens.
3. Select the campaign for which you would like to obtain information and click on the respective campaign name. The Campaign - <Your campaign name> window opens.
4. You can find the desired information under **Campaign Members**.

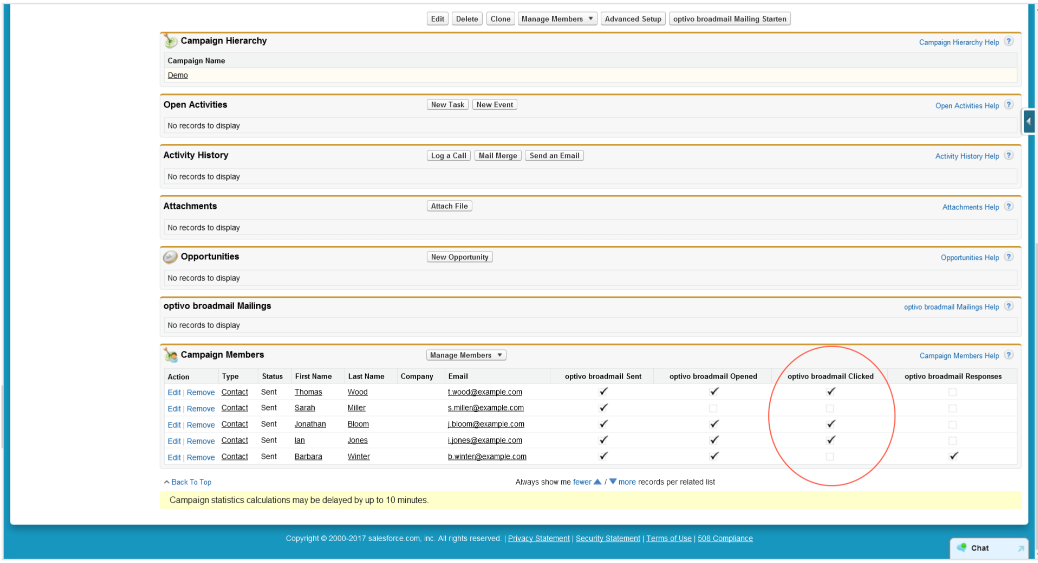
   If your mailing was sent to a contact/lead, the corresponding check box under **Sent** is selected.



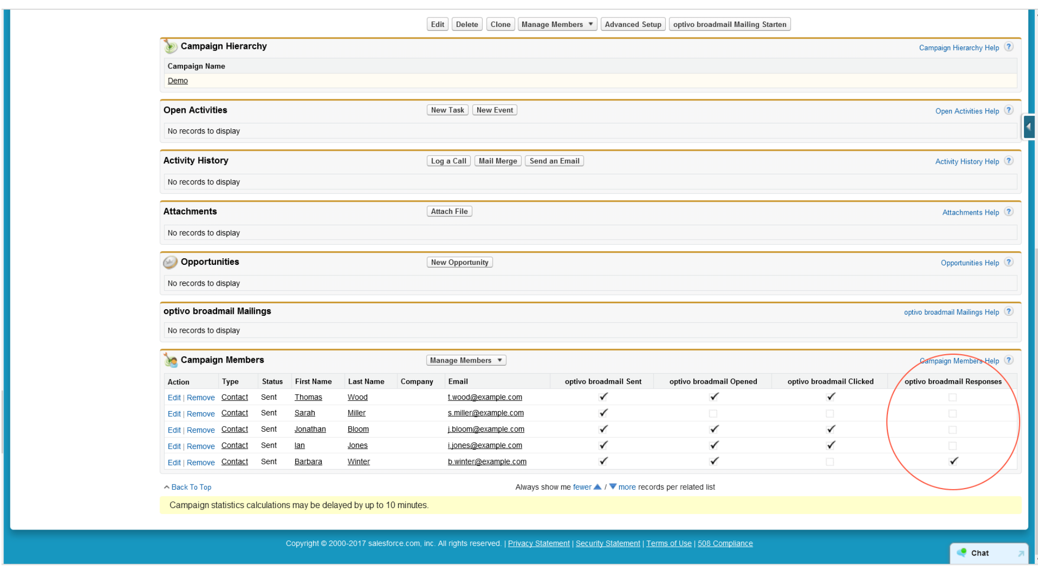
If the contact/lead has opened your mailing, the corresponding check box under **Opened** is selected.



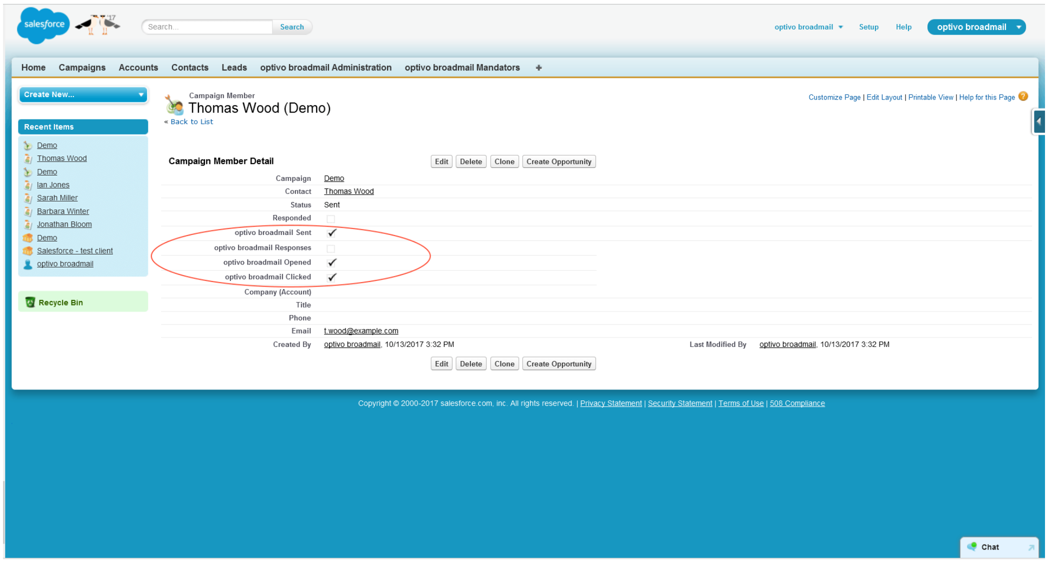
If the contact/lead has clicked on one or several links in your mailing, the corresponding check box under **Clicked** is selected.



If the contact/lead has directly replied to your mailing, the corresponding check box under **Responses** is selected.



You can also find information on the dispatch status, openings, clicks and direct replies on the campaign member detail page. To open the campaign member detail page, click the name of the respective contact/lead on the campaign detail page under **Campaign Members**.


Home
Campaigns
Accounts
Contacts
Leads
optivo broadmail Administration
optivo broadmail Mandators
Campaign Member
Thomas Wood (Demo)
Campaign Member Detail
Campaign
Demo
Contact
Thomas Wood
Status
Sent
Responded
optivo broadmail Sent
optivo broadmail Responses
optivo broadmail Opened
optivo broadmail Clicked
Company (Account)
Title
Phone
Email
t.wood@example.com
Created By
optivo broadmail, 10/13/2017 3:32 PM
Last Modified By
optivo broadmail, 10/13/2017 3:32 PM

Translation interface

The semi-automatic translation interface makes it easy and fast to create and send mailings in multiple languages. The original mailing is used as source mailing for other languages. Any mailing you create can be used as source mailing with the translation interface. After the mailing has been created and the content is introduced, the translation is requested via the interface. Until the translation has been submitted, the mailing cannot be dispatched. When the translation is submitted by the translation service provider, a new mailing in the target language will be created automatically in your Episerver Campaign client.

Data format

Episerver Campaign creates an XML file for translation from the source mailing. The delivered data have an identical data structure within the same XML namespace.

Translation service provider

The translation is carried out by a translation agency. The data transfer between Episerver Campaign and the translation service provider is realized via email. The XML file to translate is sent automatically to an email address provided by the translation service provider and configured at setup. The translation into the target language is sent back to Episerver Campaign vial email, too. The translation is imported automatically.

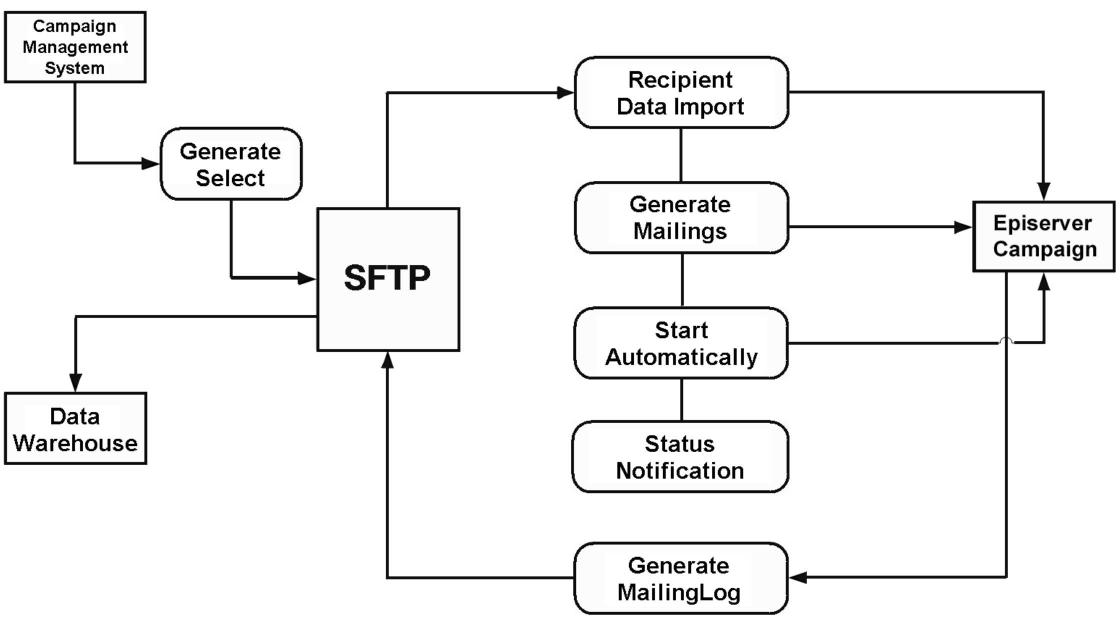
> Which translation service providers can be used? In principle, any translation service provider can carry out the translations for you. The only condition is, that the chosen translation service provider can handle the delivered XML format.

Closed Loop interface

To realize complex email marketing campaigns, a bi-directional interface between Episerver Campaign and external systems has been implemented. The external system (i.e. the customer's system) automatically triggers mailings Episerver Campaign. Action-based mailing data are logged in Episerver Campaign and returned to the external system. This response data can be further processed by the customer within a third system, e.g. in a data warehouse.

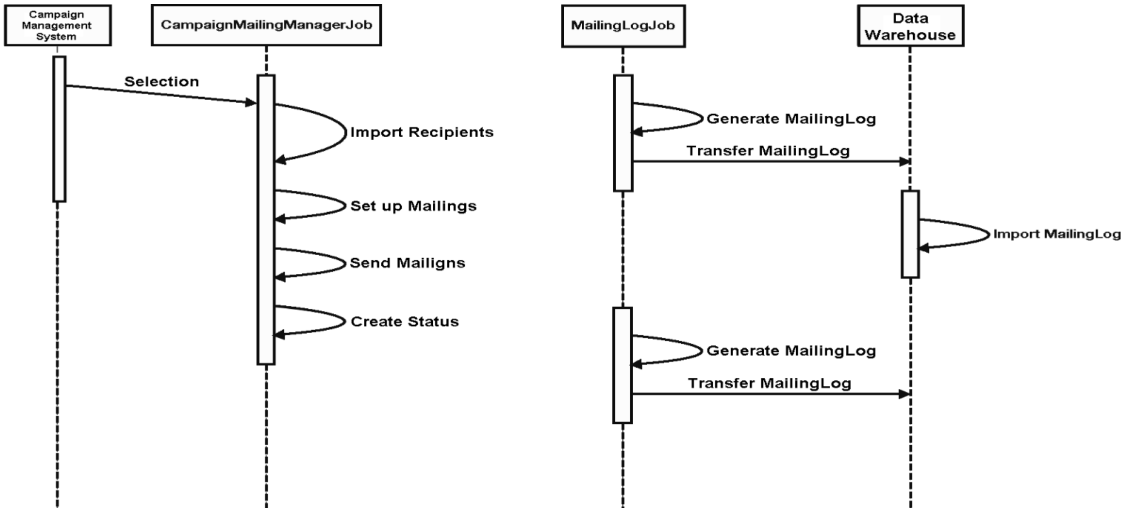
The closed loop interface consists of two modules. The import module automatically transfers recipient data (e.g. product recommendations) from your IT system (e.g. data warehouse) to Episerver Campaign and automatically triggers mailings. The response data export module transfers action-based mailing data – such as openings, clicks, responses, unsubscribes etc. – back to your IT system. Both modules of the interface can be configured separately and used independently of each other. The following picture shows this process in a simplified way without possible exceptions.

Data Exchange: External system I—External system II (data warehouse)



A service processes all received data within Episerver Campaign. As soon as you store a file on the server, various jobs are being executed: Recipients are imported, mailings are created, sent and a status notification is sent. The response data export module is responsible for the return channel. This module exports all statistical data to the customer's system. The log data can be integrated into the customer's data warehouse.

Sequence diagram: External system I—External system II (data warehouse)



Data exchange

The data exchange is realized through a SFTP server set up at Episerver. Recipient data is transferred to that server. Response data is available for download from this same server. Running transfers must have a temporary file name, to avoid incomplete file exchange. The naming conventions are described in the respective paragraphs.

For trouble-shooting in the case of incomplete data transfer see Data transfer trouble-shooting.

The above described does not respect the strict separation of clients. All user data can be transferred through one SFTP account. It is possible, though, to set up separated SFTP accounts for each client, if this is necessary for security reasons. Alternatively, it is possible to set up separate sub-directories in one client. In both cases, the recipient data import module must then commit one file per client/directory.

Recipient data transfer

Recipient data can be transferred to Episerver Campaign at any time. The transfer is made to the SFTP server as described above. The name convention of the transferred files must be as follows:

```
YYYYMMDDHHMMSS_subscribers.csv
```

The actual 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.
- For line breaks use line feed.

- 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 are processed automatically every 10 minutes. The SFTP server of Episerver Campaign provides log files for download within 30 days after creation.

According to the specifications, all fields of the main recipient list must be committed. Fields that are supposed to not contain any value are committed as empty columns. The existing fields as well as the field sequence are fixed and must not be altered without the consent of both parties.

Personalization and recommendations

Data enhancement of the delivered recipient data is possible to add personalized content, for example product recommendations, to the mailing. One or more fields reserved to a product ID are added to the CSV file containing the recipient data. The product information (e.g. title, description, image-URL) for these recommended products are transferred in a second CSV file. In the mailing product information is inserted using a placeholder and field functions. Assignation of product id's to recipients is done by the customer.

With a web analysis software recommendations are available via a CSV file. To each product other recommended products are assigned. Product information is rendered into the mailing using a special field function, similar to the process described above. No assignation of products to a recipient has to be made, since the web analysis software automatically assigns recommended products according to the initial configuration.

To take advantage of personalized content, Episerver first needs to create a new template for you.

Create source mailings and send mailings

Using Episerver Campaign a so-called source mailing is created. Placeholders that are referencing a specific field of the recipient list are inserted into the paragraphs of the mailing. Thus, product data and other information can be individually assigned and inserted into the mailing when sending it. If you want to send multiple newsletters or newsletters are sent at the same time, you have to create multiple source mailings. The source mailing is never sent. The system automatically creates a copy of the source mailing and then sends it. The source mailing can then be used again.

As soon as a file containing recipient data is stored on the SFTP server (in the corresponding directory), the mailing is sent. Every ten minutes a cron job checks this directory for new files. If there is a new file, 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:

1. **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.
2. **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. Thus, all types of content (texts, pictures, attachments, hyperlinks) can be added to a mailing.

As soon as the data is imported, the mailing is automatically sent. Every sent mailing gets a unique ID.

> Send test email using the closed loop interface. It is possible to send test emails by storing test data on the server instead of real recipient data. 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.

Mailings are triggered only by storing a file on the server that is configured for the closed loop interface. It is not possible to send mailings by using the Episerver Campaign user interface.

> The source mailing can be customized for different newsletters. If you want to change the source mailing, you have to ensure that the previous mailing was successfully sent. Additionally, you have to ensure that the correct mailing ID of the source mailing is used within the recipient CSV file.

Data transfer trouble-shooting

Should there be any problem transferring the data, an email notification is sent. The email address, to which notifications are sent, can be any email address and will be configured beforehand. An error file is generated and the transfer stopped. The exact behavior of the interface in case of an error can be configured in the course of the implementation process. After the implementation has been completed, this setting can be switched off.

After an error has occurred, the interface must be restarted accordingly. The restart will be made according to the error file. There are two cases:

1. Data import failed
2. Error when mailing was started after data import

Errors during the data transfer are handled by our support, since such errors only can be resolved manually.

Monitoring and sending status

The status of the process after the recipient data has been imported is sent via email and logged into a log file. This assures that all actions within the interface are properly logged and documented by 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 (**BROADMAIL_ID**)
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

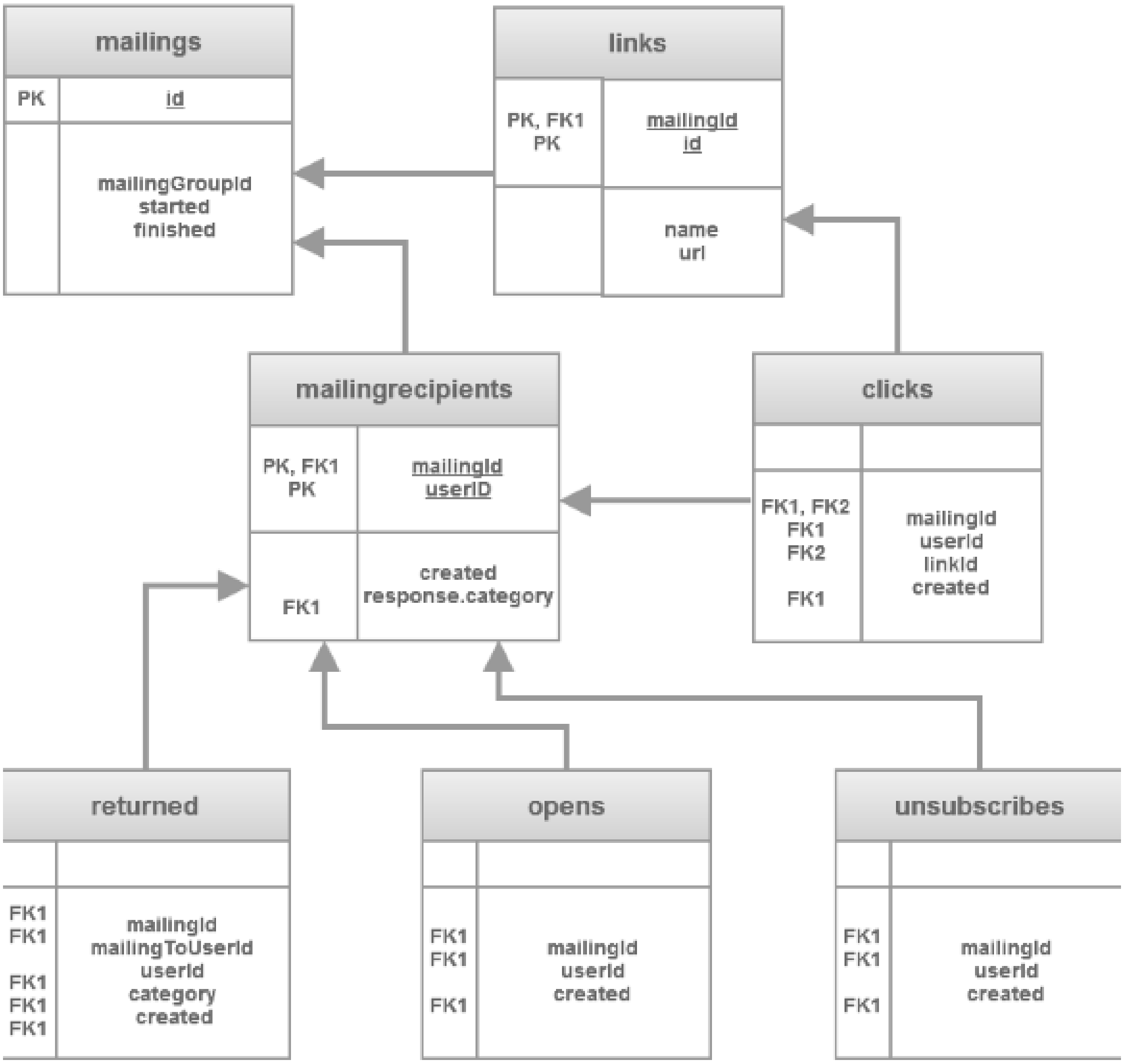
The list configuration described above is only a proposal. If necessary, more fields can be added to the list. If additional data are necessary for personalization purposes, tell us beforehand and document them in the interface setup.

Specification of the response data

The response data is generated every day from the log files and available for download at an appointed time via an SFTP server within Episerver Campaign. The files contain the latest data since the last delivery. The files containing the mailing data are available for download within 30 days after starting the mailing. The response data consists of seven CSV files. Basically, each CSV file can be read as a table according to the following ER diagram. More detailed type information can be found in the respective paragraphs for each file.

The file names used in the following sections are examples. The file names can be configured in accordance with your requirements.

Simplified ER diagram of the response data (PK = primary key, FK = foreign key)



Sent mailings

File **YYYYMMDD_mailings.csv** contains all mailings, which have been sent in the referenced period.

Column name	Data type	Example	Remarks
id	Bigint/Long	`51106527229`	Mailing ID in (**BROADMAIL_ID**)
mailingGroupId	Bigint/Long	`44018617811`	Client ID in Episerver Campaign
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

The file **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

The file **YYYYMMDD_links.csv** contains all links from the mailing.

Data are 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	Episerver Campaign BLOCKht-	Link target (URL)

Column name	Data type	Example	Remarks
	(255)	tp://www.example.com	

Clicks

The file **YYYYMMDD_clicks.csv** contains all clicks in a mailing, within the referenced period, generated by recipients. 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. There can be multiple clicks from one recipient within one second.

Opens

The file **YYYYMMDD_opens.csv** contains all opens by recipients for all mailings 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.

Column name	Data type	Example	Remarks
			One recipient can open a mailing several times. In this case, each opening generates a singular data set.

Unsubscribes that refer to a mailing

The file **YYYYMMDD_unsubscribes.csv** contains all unsubscribes from recipients within 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

The file **YYYYMMDD_responses.csv** contains all emails that have been 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.
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.	Delivery status.

Column name	Data type	Example	Remarks
		» `temporary_bounce`. Soft bounce. » `fatal_bounce`. Hard bounce. » `autoresponder`. Autoresponder.	
created	DateTime	`2007-10-24 12:07:55`	Date and time of the response.

Installation and fees

The installation of a closed loop interface is subject to one-time expenses. For operation and maintenance a monthly service fee is charged. Prices vary due to the configuration of the interface (uni- or bi-directional). For detailed information and calculation, ask customer support.

Since the response data consists of non-anonymized action-based data, you will have to indemnify and hold us harmless in advance from any potential liabilities and third-party claims which may result from making this functionality available to you.

SMTP API

The easiest way to send emails

Are you investing a lot of time and creativity in the design of your mailings – only to find that their deliverability rates leave a lot to be desired? Or maybe you either cannot or do not want to outsource your mailing lists to an external system? Then we are sure that our SMTP API is the dispatch solution you have been looking for. Conversion is extremely resource friendly, because you can continue using your own software for design, distribution and recipient data management. You profit from our high-performance dispatch infrastructure as well as the reputation among internet service providers Episerver enjoys both in Germany and around the world.

Regardless of whether it is transactional emails from your online shop, marketing emails from your content management system or specially designed campaigns for special occasions – dispatch via our SMTP API means your emails are certain to reach recipients. You will not need to hire a deliverability expert or set up an elaborate server structure to obtain significantly higher delivery rates. All you need to do is take advantage of our years of know-how, technical capabilities and deliverability management skills.

Here is how you will benefit:

- Above-average email delivery rates and reputation
- Seamless integration into existing system architecture
- Mailing development and recipient management using your current system
- Deliverability monitoring by our deliverability experts
- Quicker and more reliable distribution, even for large recipient lists

Technical implementation

A client for use by Episerver Campaign is required for the installation of SMTP API. If you are not already an Episerver customer, our support team can install a client for you. To activate the interface, we will need to have the IP addresses you use for sending out emails. You will need to register the email server as SMTP server, together with authentication, in your distribution system. Our support team will provide you with this information. In addition, we also require a sending domain that corresponds to the host name of the sender address. If, for example, you send out your mailings from the address "newsletter@news.example.com", then you will need to enter the sending domain "news.example.com". This domain will be delegated to Episerver.

Standard distribution

The requirements described in the previous paragraph are sufficient for standard distributions. Distribution is handled internally via a mailing ID. Billing for emails sent occurs monthly and is based on this mailing ID.

Distribution through sub-clients

If you are an agency tasked with sending out mailings for a number of different clients and therefore need to bill each separately, it is possible to address different mailings through a single ID that is integrated into the email header. Our support team will provide you with the code and relevant ID. Simply integrate this code into the email header of the mailings you wish to send out.

Response management

By carrying out distribution through SMTP API you will also be able to take advantage of our response management. This ensures that blocked email addresses and those email addresses that have exceeded a set limit of hard or soft bounces will no longer receive mailings. This helps contribute to our reputation by maintaining exceptionally high delivery rates for mailings sent through Episerver. To use bounce management, installation of the SMTP API requires an email address where we can forward all returned emails. This forwarding address is obligatory and may not be part of the sending domain.

Why is an email not being delivered?

An email sent via SMTP API may be undeliverable for a number of reasons:

1. Delivery may fail if the server charged with delivery does not recognise the email address (hard bounce) or the mailbox is temporarily unavailable (soft bounce).
2. Delivery may fail if the mail server at Episerver is unable to verify the email header or associate it with a mailing.
3. An email will not be sent if the recipient's email address is on a global blacklist or if it exceeded the bounce limit.

What we need from you to install the SMTP API

In order for our support team to be able to install the SMTP API, you will need to provide us with the following information. Fill out the PDF form you get from the customer support to set up your client and email it to developersupport@episerver.com.

- Requested name of your client (or the name of your current Episerver Campaign client)
- IP address(es), to be used to access the SMTP interface
- Sending domain
- Email address for bounce management - the host name of this address may not be the same as the sending domain name.

What you receive from us to install the SMTP API

Once your client and SMTP API has been set up and configured, our support team will provide you with the following information:

- Name of the SMTP server
- SMTP authentication
- An email header code for distribution via several mailings

What you need to do in your system

Configure your dispatch system using the data you received from our support team. Once this is completed, you can then begin sending out mailings via the SMTP API:

1. Delegate the sending domain to Episerver. Instructions can be found here.
2. Add the name of the SMTP server smtpapi.campaign.episerver.net, the SMTP authentication and the Port 25 to your dispatch software. To ensure that the authentication data is transmitted encrypted, TLS encryption must be enabled. The certificate "Thawte SSL CA" of the certification authority "Thawte" must be known as a trusted certificate in your dispatch software.
3. If you are sending via several mailings, include the email header code in the header of the mailings.

Technical specifications for emails sent through the SMTP API

When submitting an email for dispatch to Episerver Campaign, the following rules must be observed. Otherwise, the dispatch will be aborted:

- The size of each email must not exceed 300 KB.
- A message ID header must be set and must have the pattern <32hhr34-42hkjh42@example.com>.
- The email must contain exactly one to header with a valid email address.
- The email must contain exactly one from header with a valid email address. The domain of this address must be identical with the sending domain configured in your client.
- No cc or bcc header must be set.
- The subject must not be empty.
- A maximum of one reply-to header must be set.
- If you use an email header code (X-bm-mailing) from Episerver to address a specific mailing, this code must be valid.
- Envelope sender and from header must be identical. The domain of the sending address must be identical with the sending domain configured in your client.
- The organizational part of the Return-Path header (envelope-from) must match the organizational part of the From header.

  > Example domain in Return-Path header: Steps 1 to 4 at https://world.episerver.com/campaign/setting-up-a-domain/.

  > Example domain in From header: Step 5 at https://world.episerver.com/campaign/setting-up-a-domain/.

- No return-path must be set.