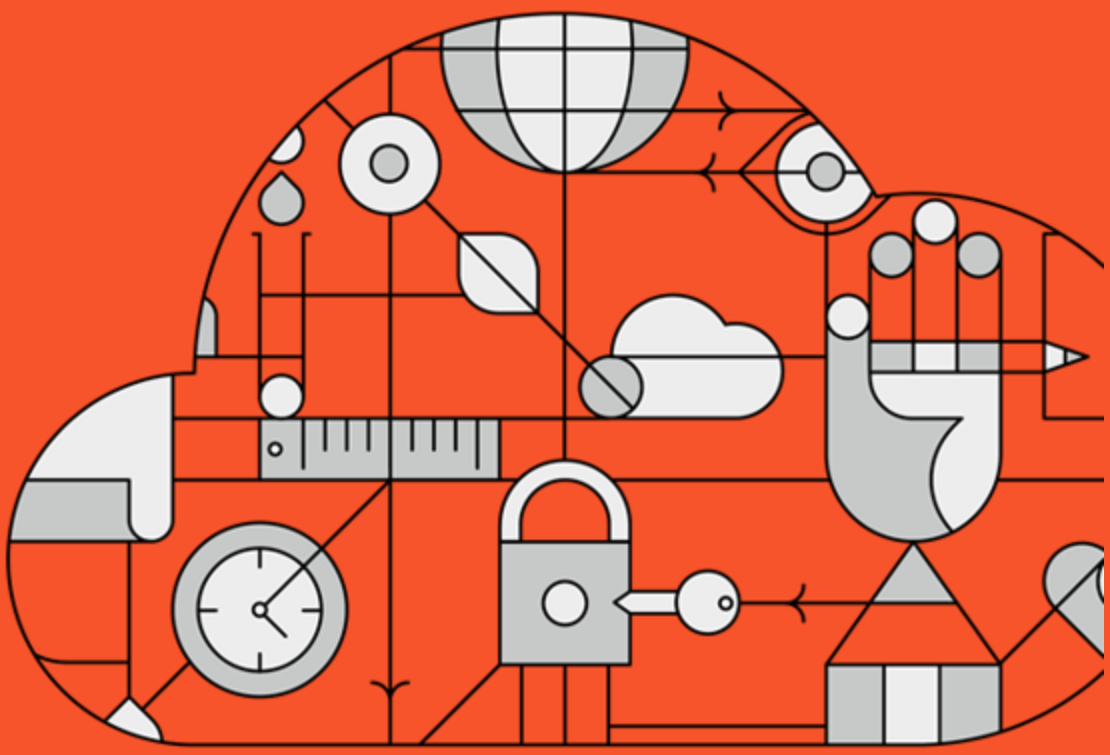
Episerver Campaign

User Guide



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Episerver Campaign User Guide

Version 6.75

Table of contents

Table of contents ... **3**

Basics and getting started ... **15**

Welcome ... 15

Symbols ... 15

ISO 27001 certification ... 16

Service description ... 17

Omnichannel marketing ... 18

Campaign management ... 21

Content management ... 24

Segmentation ... 27

Analysis tools ... 28

Episerver integrations ... 30

Dispatch and deliverability ... 40

Security and availability ... 42

Recipient management ... 43

System user and permission management ... 45

User interface ... 46

Expandability ... 47

Service ... 47

Usage notes ... 48

About Episerver Campaign ... 48

Notes on use of the manual ... 48

Operating tips ... 49

Login and logout ... 53

Start menu ... 55

Menu bar ... 57

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Clients ... 65
Client hierarchy ... 65
Decision guidance: One client or multiple clients? ... 66
Client setup ... 68
Users ... 69
Manage users ... 69
Permissions ... 75
Roles ... 75
Exclusive IP addresses ... 78
Omnichannel campaigns ... 79
Omnichannel information center ... 79
Episerver Print ... 79
Episerver Mobile Push ... 102
Episerver SMS ... 110
Episerver Fax ... 120
Smart Campaigns ... 123
Campaign overview ... 124
Create and edit campaign ... 132
Smart Campaigns nodes ... 135
Edit message content ... 146
Marketing automation ... 160
Keeping customers in your sites ... 161
Marketing Automation packages ... 163
Campaign overview ... 165
Create and edit automated Marketing Automation campaigns ... 165
Marketing Automation nodes ... 169
Marketing Automation campaign report ... 182
Marketing Automation guide ... 183

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Transactional mails 204
Transactional mail overview 204
Confirmations 206
Registration confirmations overview 206
Message templates 208
Template overview 208
Template actions 208
Basic configuration 209
Content 212
Mailings Classic 212
Mailing type 212
Mailing actions 213
Details 214
Create new mailing 216
Step 1 – Name and description 216
Step 2 – Recipients and sender 218
Step 3 – Subject and content 219
Step 4 – Tracking 223
Step 5 – Test email 225
Step 6 – Options 226
Split dispatch 228
Create and edit a split mailing (Mailings Classic) 228
Recipients 229
Target groups 231
Dispatch 232
Optimize and send the master mailing 232
Examples 234
Send time optimization 236

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Why should you automate optimization? 237
How it works 238
Overview of benefits 239
Setup 239
Using send time optimization 239
Send time optimization in the Wait node 239
Send time optimization in the A/B test node 246
Analysis: Send time optimization overview 256
Validate mailing prior to dispatch 261
Send automatic notification after dispatch 262
Send S/MIME signed emails 262
Requirements 262
Setup 263
Import S/MIME certificates 263
Delete S/MIME certificates 265
Edit and manage content 267
Edit mailing content 268
Editing mode Easy edit 268
Change view 268
Action buttons 270
Paragraphs 271
Edit directly 276
The Template Kit 278
Simply transfer your design specifications directly into the Template Kit 278
Basic settings are inherited all the way to the content 278
The separation of structure and content provides highest flexibility 278
Configuration paragraphs – Organizing your newsletter 278
Flexible tables of contents 279

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Fully equipped and seamlessly integrated 279
Technical instructions for your layout in the Template Kit 280
General settings 283
Pre-header 319
Header 322
Footer 323
Grouping paragraphs 323
Content paragraphs 327
a) If your system/your data source has a feature that allows the export of datasets into a CSV file (e.g. a plugin) 358
b) If you want to save your product data into a CSV file 359
a) Use a recipient list as a mapping reference 384
b) Use a mapping file as a mapping reference 385
a) If you are using your recipient list as the mapping reference 388
b) If you are using a mapping file as a mapping reference 389
Field functions 470
Add a field function to a mailing 471
Use cases of field functions 471
Edit field functions 472
Template engines 473
Dynamic Rendering 473
Velocity 474
Hints for using velocity 479
Coupon system 479
Assignment 480
Insert coupon codes in a mailing 480
Test emails 480
Manage coupon blocks 481

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Countdown timers 487
Set up countdown timers 488
How it works 488
Prepare graphics 490
Create a countdown timer 498
Insert a countdown timer into a message 502
Edit, copy and delete a countdown timer 511
Troubleshooting countdown timers 513
Click2Go 515
Activate Click2Go 515
Insert and design buttons 515
Picture Perfect 518
What features does Picture Perfect offer? 518
How do you activate and use Picture Perfect? 519
Image personalization 520
How does image personalization work? 520
Setting up a mailing project with personalized images 521
Uniting image personalization and target groups 521
Motif selection 521
Examples of use 522
Costs 523
Easy Copy 523
Setup 523
Copy content 523
Mobile Fusion 527
Why a mobile version? 527
Adaption of your template 527
Flexible vs. fixed width 528

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Optimizing newsletters for mobile devices ... 529
Attachments ... 543
New ... 543
Edit ... 543
Delete ... 543
Deselect ... 544
Categories ... 544
Add image ... 545
Add attachment ... 546
Personalized Attachments ... 547
Prefix or suffix subject line ... 547
Upload file ... 547
Update mailing content prior to dispatch ... 547
Publish mailing ... 548
Video emails ... 548
Tips for your video emails ... 548
Tools for incorporating videos into emails ... 548
Incorporating videos into a mailing ... 552
Newsletter design ... 555
Best practice in newsletter design ... 555
Template Kit or custom template? ... 556
Layout fundamentals ... 557
Recipients ... 561
Recipients overview ... 561
Show recipient datasets ... 561
Manage recipient lists ... 562
Import ... 564
Step 1: Start ... 565

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Step 2: Recipient list ... 566
Step 3: Row mapping ... 567
Step 4. Import options ... 568
Step 5: Import ... 570
Trial import ... 571
Export ... 571
Cross checking recipients ... 572
When importing recipient lists ... 573
When choosing recipients for a mailing ... 574
When sending out a mailing ... 574
Bounces ... 574
Blacklists ... 576
Unsubscribe lists ... 576
Recipient lists ... 578
Copy ... 578
Edit ... 578
Clear ... 579
Data fields ... 579
Data types ... 579
Cleanup ... 580
Target groups ... 582
Target groups overview ... 583
Target group analysis ... 585
Target group definition ... 588
Opt-in ... 598
The opt-in method ... 599
Subscription and unsubscribe forms ... 606
Send last mailing after double opt-in ... 610

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Recipient history 611
Set up recipient history 611
Use recipient history 612
Display message history 612
Export mailing and performance data 623
Click profiles 624
Create and edit click profiles 625
Assign click profiles 625
Returned emails – Overview 629
Display returned emails 629
Blacklist overview 631
Add 632
Edit 632
Delete 632
Wildcards 633
Find 633
Feedback loop entries 633
Import blacklists 634
Cleanup blacklists 634
Import and export blacklist automatically 635
Change email addresses 635
Export recipients by category 635
Import recipients by category 636
Preference Center 636
What data should be requested and for what purpose? 637
Data exchange 638
Form fields 638
Error messages 639

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Design/Templates 639
Security hints 641
Analytics **643**
Deep Analytics 643
Use of raw data to enable incredible detail 644
Analyze data using Excel – or simply with our software 644
Multidimensional analyses par excellence 645
Regular reports via email 645
Analyses across multiple clients 646
Target group-specific evaluations 646
Introduction 646
Overview 646
Report templates and ad hoc reports 647
Execute, display and download reports 661
Display and download a Deep Analytics report 662
Pivot tables 663
Reports 665
Create and edit reports and report templates 666
Evaluate and edit charts 668
Live Analytics 670
Live Analytics packages 671
Overview 672
Create and edit Live Analytics analysis 673
Live Analytics analysis items 677
Live Analytics detail view 685
Pre-check for deliverability 689
Execute and display pre-check 691
Post click tracking 694

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Setup ... 694
Technical implementation ... 695
Working with post click data ... 697
Visual link analysis ... 700
Visual link analysis of post clicks ... 702
Attention analysis ... 702
New attention analysis ... 703
Attention analyses guide ... 705
Activity overview ... 712
Set up the activity overview ... 713
Layout of the activity overview ... 714
Use the activity overview ... 714
Service and support ... 720
Customer support ... 720
Full service dispatch ... 720
What we need from you ... 720
Lead in time ... 721
What Episerver does for you ... 722

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Basics and getting started

In this chapter, you'll learn all the basics you need for working with Episerver Campaign. What's more, you can find out about the range of features and upgrade options of our software and services.

- Welcome: Introduction to this document and information about the security functions
- Service description: Overview of standard functions and upgrade options
- Usage notes: Working with the user interface, including logging in and out
- Clients: Layout of the Episerver Campaign working environment
- Users: Setting up user accounts and permissions
- Exclusive IP addresses: Information on dedicated IP addresses

Welcome

Welcome to the Episerver help, Episerver's help portal.

Episerver help provides detailed instructions, information and tips to ensure that you get the best use out of our omnichannel platform. The following sections describe:

- the features of Episerver Campaign
- expansion options
- how to use the software
- campaign creation
- dispatch channels
- the content management system
- recipient management
- analysis options
- the integration and interfaces

When you visit Episerver help for the first time, take a few minutes of your time to familiarize yourself with the meaning of the various symbols used.

Symbols

1. Text designations

Some sentences and paragraphs throughout the instructions are marked with symbols.

➜ Action. Blue arrows require you to perform an action.

✔ Result. Green ticks show the result of taking an action or set of actions (to check whether all required actions were performed successfully).

✘ Error. The red X indicates an error that may occur due to an operation being performed incorrectly.

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2. Tips and warnings

Information, tips and warning messages are marked with symbols throughout the instructions.

Information. The blue light bulb symbol indicates information that will help you understand features, requirements or actions needed.

Note. The yellow warning circle indicates important information. If this information is ignored, errors of minor or medium severity may occur.

Warning. The red warning triangle indicates warnings. If these warnings are ignored, serious errors will occur.

ISO 27001 certification

Episerver Campaign's safety management

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

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

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

Your advantages

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

What does ISO/IEC 27001:2013 mean?

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

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1. **Information security management**: Information security management evaluates processes, their functionality and infrastructure of Episerver Campaign by identifying possible threats, risk handling and responsibilities. It represents the current state and serves as a base for the PDCA guidelines for continuous improvement of information security.
2. **PDCA guidelines for continuous improvement of information security**: These guidelines for the **P**lan-**D**o-**C**heck-**A**ct process define in four phases the suitable measures to determine and evaluate information security; the measures to be implemented and realized; how these measures and their effectiveness can be verified constantly; and finally how these measures can be maintained, improved and fixed during operation.
3. **Inventory sheet**: All assets of the company are registered here. Each asset is evaluated regarding its priority for information security. Next, a procedure directory is created, which contains and describes all processes related to this asset.
4. **Risk measure matrix**: In this matrix, all implemented security measures are correlated to a concrete risk. With this matrix, the remaining risk can be determined and thus assured that only a minimal acceptable remaining risk will occur at any time in any process.
5. **Compliance**: This aspect ensures that all processes are defined within the legal range and in compliance with the standards set by the legislature.

Who certifies all this and how is the process conducted?

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

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

Service description

Episerver Campaign is a powerful software for creating and sending email and omnichannel campaigns.

What makes Episerver Campaign special: Episerver Campaign and its associated services allow you to run dialog marketing campaigns on all channels and send professional marketing messages by email, SMS, push, or fax[1], letter[2] or post card[2] from a single software package. With Episerver Campaign, there is no longer any need to buy and combine different products to communicate with your customers.

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Episerver Campaign comes fully integrated with all the tools you need for your one-to-one dialogs with your customers: One-shot campaigns, Marketing Automation, transactional emails, opt-in processes and powerful segmentation and analysis tools. This allows you to analyze the success of your mailings down to the smallest detail or even separately for each recipient and to generate reliable data for your marketing research.

Episerver Campaign is furthermore a team player and – thanks to its many interfaces – will effortlessly communicate with your webshop, customer relations management system or web analytics service provider. Connect your systems to Episerver Campaign and profit from the benefits of seamless data exchange – automatically display products from your webshop in your messages, create specific target groups and create personalized product recommendations, or to further consolidate your customer relationships through successful closed-loop marketing.

All you need for Episerver Campaign is internet access and a web browser. Episerver Campaign can be accessed from any computer around the clock. It does not have to be downloaded or installed on your computer.

For maximum peace of mind and to guarantee the highest level of data safety possible, Episerver Campaign is TÜV-certified as compliant with ISO 27001 and also is a member of the Certified Senders Alliance (CSA) – to make sure that your mail will always arrive where intended.

[1] This feature is only available in Germany, Austria and Switzerland.
[2] This feature is only available in Germany.

Omnichannel marketing

Reach your customers on all channels: Episerver Campaign contains flexible tools for successful omnichannel marketing – using a single provider.

Range of features	
Email campaigns	✓
SMS campaigns[1]	✓
Print campaigns[1, 2]	✓
Push campaigns[1]	✓
Fax campaigns[1, 3]	✓
Multi-channel campaign automation[1]	✓
Separate blacklist management for each channel	✓

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Episerver email

EpiserverCampaign virtually sends your emails in real time. Episerver Campaign also comes with deliverability management, which allows you to significantly increase your deliverability rates.

Range of features	
Sending speeds of up to 50 million emails per hour: more than 90% of emails are delivered within the first minute.	✓
Comes with email throttling to allow you to, e.g., avoid unusually high traffic to your website and stagger customer visits for campaigns that are likely to attract a lot of interest (such as, special offers, prize draws, or surveys)	✓
Enhanced HTML layout for ensuring emails are correctly displayed in webmailers and email programs	✓
Mobile Fusion – responsive design for optimized display of your emails on mobile end devices	✓
Auto generated text version	✓
Auto generated online version	✓
Landing pages	✓
Can be personalized	✓
Web forms for allowing recipients to register and recipient management*	✓
SWYN (Share With Your Network) – Sharing email contents on social networks (Facebook, Twitter, Xing, Myspace).	✓

Episerver SMS

The seamless integration of SMS messaging means that you can reach your customers no matter where they are.

Range of features	
Supports GSM and UCS2 coding for international character sets	✓
Capable of sending multi-part SMS (concatenated SMS)	✓
Direct message routing to 12 countries	✓
Standard number-based sender identification	✓

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Range of features	
Speed-dial number-based sender identification	✓
Alphanumeric character-based sender identification	✓
Can be personalized	✓

Episerver Fax

Event-driven and automatic: Episerver Campaign allows you to launch professional fax-based campaigns. The integrated content management solution allows you to give every fax-based campaign a unique design.

Range of features	
Infofax template	✓
Custom fax templates	✓
Import templates	✓
Can be personalized	✓

Episerver Print

EpiserverCampaign supports direct mail print mailings. Using a combination of print mailings and emails in one-to-one dialog marketing campaigns can increase your response rate by up to 50%. Print mailings can be triggered by a special offer or an event (e.g., following a purchase or by a birthday). The printing process and the mail dispatch are handled by Deutsche Post, which is Germany's leading dialog marketing service provider.

The Episerver print mailing service is only available in Germany.

Range of features	
A4-size letters containing up to 3 pages, printed on one or both sides	✓
A6-size postcards, DIN long, DIN long envelope, Maxi	✓
Templates for print mailings for optimal print results and maximum ease of use – no previous experience required	✓
Short production lead times	✓

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Range of features	
Automated pre-press workflow and dispatch	✓
High-quality digital prints	✓
Delivery options: Economy delivery	✓
Delivery options: Express delivery	✓
Can be personalized	✓

Episerver Mobile Push

Send automated push messages and reach every customer who has your app on their smartphone or tablet.

Range of features	
Available for Android	✓
Available for iOS	✓
App-based opt-in methods	✓
Can be personalized	✓

[1] Setup and use of these features may be associated with additional costs depending on application and selected configuration.
[2] This feature is only available in Germany.
[3] This feature is only available in Germany, Austria and Switzerland.

Campaign management

Smart Campaigns

Sleek, intelligent and easy to use: Episerver Campaign Smart Campaigns have a convenient front-end for one-shot campaigns. Navigation paths and click paths have been optimized for maximum efficiency. You create campaigns with the drag-and-drop function and insert contents using templates.

Range of features	
Create campaigns with drag-and-drop	✓
A/B tests (split tests) and automatic send function for the best performing message	✓
Six criteria for selecting the best split	✓

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Range of features	
Allows campaigns to be worked on by several users simultaneously	✓
Designed for creating email, SMS, print, fax and push campaigns	✓
Create campaigns from message templates	✓
Reuse successful campaigns with a single click	✓
Integrated pre-campaign recipient-path-analysis	✓
Integrated post-campaign reporting	✓
Select send dates and delayed delivery in line with A/B test results	✓
Send messages to specific target groups or a limited number of recipients	✓
Campaign throttling	✓

Marketing Automation [1]

Automated, complex lifecycle campaigns using drag-and-drop: Marketing Automation is designed for maximum efficiency and allows you to automate frequently recurring customer dialogs, such as welcome and happy birthday messages, reactivation campaigns, abandoned cart emails and much more. Marketing Automation event and date-triggered mailings increase conversion rates and allow you to analyze recipient flows and activities in real time. Marketing Automation furthermore comes with an automated feature for changing recipient data and moving or copying recipients into different recipient lists.

Range of features	
Create Marketing Automation campaigns with drag-and-drop	✓
Omnichannel: Send out email, SMS, fax, print and push messages to different end devices and target groups from a single Marketing Automation campaign	✓
Create automatic lifecycle marketing campaigns	✓
Send out activity and event-based mailings from a single campaign	✓
Allows you to actively run multiple campaigns at the same time	✓
Link multiple campaigns, e.g., by automatically assigning recipients from one campaign to another	✓
Modify campaigns while active	✓

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Range of features	
Post click-triggered campaigns	✓
Integrated campaign recipient-management (updating, moving and copying recipients/recipient data)	✓
Integrated campaign reporting for active campaigns – allowing you to monitor the number of recipients that have already passed the individual campaign nodes at any time	✓

Transactional mails

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

Range of features	
Sent through Marketing Automation	✓
Can be sent as email, SMS, print or fax	✓
Sent in real time using high-performance interfaces	✓
Can be personalized	✓
Can be used to send personalized attachments (only for HTTP API)	✓

Registration confirmations

Manage your double opt-in mailings with Episerver Campaign and make them reflect your corporate design. The integrated reporting feature means that you can check the number of recipients that have completed the registration process at any time.

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

[1] Setup and use of these features may be associated with additional costs depending on application and selected configuration.

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Content management

Content management system

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

Range of features	
WYSIWYG editor	✓
Source text editing	✓
Import mailings as zip archives	✓
Automatic text version generator	✓
Create, manage and change landing pages	✓
Content reports for link validation	✓
Send images with offline HTML[1]	✓
Automatic link extensions for click tracking	✓
Manage HTML, text and mobile link tracking	✓
Personalized and target group-specific subject lines	✓
Personalized images	✓
Automatically creates online version	✓
Centralized administration of attachments	✓
Personalized attachments (only when used with transactional emails and the HTTP API)[1]	✓

Template Kit

You define the basic layout and appearance of the different elements in your mailing into which you can copy or move individual content blocks with drag-and-drop. All of the basic mailing elements (e.g., sender information) are predefined to make it easier to create new mailings and to make them less error-prone.

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Range of features	
Predefined pre-header, header, body and footer sections	✓
Grouping paragraphs for creating flexible layouts (1- or 2-column)	✓
Paragraph types for all essential applications	✓
Target groups and click profiles for use at paragraph level	✓
Nine fonts to choose from	✓
Install additional standard web fonts[1]	✓
RSS feed integration[1]	✓
Content interface[1]	✓
Add links to social networks (SWYN)	✓
Mobile Fusion – responsive web design – to ensure that your mailings are optimally displayed on mobile devices, with a preview function for all conventional device formats	✓
Separately edit HTML, text, and mobile mail versions	✓
Picture Perfect – integrated image editing tool for enhancing image quality, resizing, adding effects and text	✓
Click2Go – button generator for adding buttons or call-to-action elements in a design-consistent layout, conveniently and directly to your template	✓
Easy Edit – split-screen view for previewing menus	✓
Easy Copy – copy and paste individual elements from other mailings or clients	✓

Custom mailing content templates

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

Range of features	
Template with your corporate design	✓

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Range of features	
Template modules designed in line with your design specifications	✓
Layout and design principles based on your style guide	✓
All features available in the Template Kit can be integrated into individual templates	✓

Coupon system [1]

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

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

Countdown timers [1]

Count down the time when your top offer ends using Countdown Timers from Episerver Campaign. Increase the attention of your recipients and the conversion rate. Countdown timers display the days, minutes, hours and seconds remaining – regardless of when a recipient opens your newsletter.

Range of features	
Supports static and animated countdown timers	✓
Editor for designing, editing and managing countdown timers	✓
Field function for mailing integration	✓

[1] Setup and use of these features may be associated with additional costs depending on application and selected configuration.

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Segmentation

Target groups

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

Range of features	
Recipient-based filter criteria, which can be based on any recipient list field	✓
Action-based criteria, such as clicks, open, hard and soft bounces, as well as post clicks	✓
Campaign-based criteria for linking several Marketing Automation campaigns	✓
Use of the operators contains, starts with, ends with, equals	✓
Use of mathematical operators for numeric fields	✓
Use of time-based operators for date fields	✓
Boolean operators ("true" or "false")	✓
Instant target group analyses	✓
Ad-hoc target groups created from Live Analytics segments with a single click	✓

Click profiles

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

Range of features	
Cross-campaign click profiles	✓
Manually assign click profiles	✓
Rule-based click profile assignments based on wildcards	✓
Rule-based click profile assignments based on regular expressions	✓

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Analysis tools

Live Analytics [1]

Recipient-based reports: Live Analytics allows you to keep a constant eye on all of your recipient data and to create real-time RFM analyses, making it easy to boost your campaigns' profitability and return on investment (ROI).

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

Deep Analytics [1]

Mailing-based reports: In-depth campaign performance analyses are key to effectively targeting your recipients and to further develop your omnichannel marketing. Deep Analytics provide you with in-depth and highly detailed data on your campaigns' success.

Range of features	
User-friendly report builder with graphical interface	✓
Create reports with drag-and-drop	✓
Choose from up to 28 analysis measures	✓
13 groupings	✓
Predefined basic reports for campaign and progression-based analyses	✓
Automatic raw data analyses for all reports based on high-performance database algorithms	✓
Post click analyses with external web analytics tools	✓
Global report parameters based on clients, time intervals, target groups, mailings and mailing types	✓

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Range of features	
Choose from different diagrams (bar charts, line charts, regional and pie charts)	✓
Aggregation of comprehensive reports in pivot tables	✓
Seamless integration with Microsoft Excel	✓
Configurable report templates in your corporate design	✓
Automatic report generation and distribution by email	✓

Attention analysis [1]

Episerver Campaign attention analyses allow you to assess the impact of your mailings, templates and landing pages' layout on viewers. This analysis tool, based on eye-tracking, creates a graphic representation of the analysis results that clearly show whether the most crucial elements of your mailing (logo, offer price and period, call-to-action) are in the right place to effectively attract the viewer's attention.

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

Deliverability testing [2]

The Episerver pre-check for deliverability and mobile preview feature helps make sure that your mailings are delivered to their recipients' inbox.

Range of features	
Mobile preview allows you to check your mailings' appearance on different provider and webmail systems	✓
View your mailing at different resolutions	✓
Spam test your mailing using over 750 rules	✓
Color-scale based spam classification analysis	✓

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Visual link analysis

A visual link analysis instantly shows the number of times the links in a mailing have been clicked. The analysis is performed directly inside the mailing itself, which means that you can quickly see whether links placed in particular locations of your mailing are clicked more or less frequently.

Range of features	
Analyzes absolute and unique clicks	✓
Proportional analysis based on recipients or clicks	✓
Visual analysis of post clicks[1]	✓

Activity overview[1]

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

Range of features	
Evaluate multiple clients at once	✓
Filter by mailing types, media types and mailing status	✓
Transactional emails and registration confirmations are supported	✓

[1] Setup and use of these features may be associated with additional costs depending on application and selected configuration.
[2] This feature is only available in Germany.

Episerver integrations

Web analytics integrations

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

Adobe Analytics[1]

When using Adobe Analytics integration, tracking data from your online shop is sent to Episerver Campaign. User actions and product data from Adobe Analytics are available for creating re-marketing

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campaigns in Episerver Campaign. Bi-directional data exchange also sends mailing and campaign parameters as well as recipient actions to Adobe.

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

econda [1, 2]

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

Range of features	
Bi-directional data exchange	✓
Tracking of standard actions: product purchase, product view and abandoned shopping carts	✓
Tracking of standard variables: Item number, order number, transaction number, category, quantity and price	✓
Grouping of mailings within a campaign for aggregated, post click evaluation	✓

etracker [1, 2]

When using etracker integration, tracking data from your online shop is sent to Episerver Campaign. User actions and product data from the etracker Web-Controlling Suite are available for creating re-marketing campaigns in Episerver Campaign. Bi-directional data exchange also sends mailing and campaign parameters as well as recipient actions to etracker.

Range of features	
Bi-directional data exchange	✓

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Range of features	
Tracking of standard actions: product purchase, product view and abandoned shopping carts	✓
Additional actions such as product reviews can be defined	✓
Tracking of standard variables: product ID, price, quantity, order number and session ID	✓

Google Analytics [1]

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

Range of features	
Unidirectional data exchange.	✓
Mailing ID, mailing name and description, mailing type and dispatch date are transmitted	✓
All recipient list fields are transmitted	✓
Time and campaign-based analyses available in Google Analytics	✓

Webtrekk [1, 2]

When using Webtrekk integration, tracking data from your online shop is sent to Episerver Campaign. User actions and product data from Webtrekk Q3 are available for creating remarketing campaigns in Episerver Campaign. Bi-directional data exchange also sends mailing parameters and recipient actions to Webtrekk.

Range of features	
Bi-directional data exchange	✓
Tracking of standard actions: product purchase, product view and abandoned shopping carts	✓
Additional context parameters can be sent, e.g., product descriptions and categories	✓

intelliAd [1]

intelliAd integration for Episerver Campaign allows you to evaluate your email campaigns using intelliAd.

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

E-Commerce integrations

Quickly and securely send order and dispatch notifications, double opt-in emails or entire campaigns. Seamless and automatic e-commerce integration with Episerver Campaign matches recipient data and recipient status and imports product data directly into your newsletter template. You further benefit from performance and reputation of our dispatch infrastructure.

OXID [1, 2]

Take advantage of the performance available from Episerver Campaign in combination with the OXID E-Shop system. Recipient data are automatically synchronized – including registrations and canceled subscriptions.

OXID integration also exports the product catalog from your OXID shop to Episerver Campaign and makes product data available in your template via a content interface. Use the features of Episerver Campaign to personalize, automate and evaluate newsletters for targeted cross and up-selling. Benefit from high delivery rates as well as the reputation and performance of our Dispatch infrastructure.

Range of features	
Available for OXID Professional Edition and Enterprise Edition	✓
Sign-up processes and newsletter registration	✓
Integrated registration forms	✓
Transactional email and double opt-in emails	✓
Personalized newsletters with shop products	✓
Opt-in using Episerver Campaign	✓
Ability to configure multiple clients	✓
Automatic import of product data	✓
Automatic import of recipient data	✓

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Magento 1[1] and Magento 2[1]

Take advantage of the performance available from Episerver Campaign in combination with Magento e-commerce platform. Recipient data is automatically synchronized, including registrations and canceled subscriptions.

Magento integration also exports the product catalog from your Magento shop to Episerver Campaign and makes product data available in your template via a content interface. Use the features of Episerver Campaign to personalize, automate and evaluate newsletters for targeted cross and up-selling. Benefit from high delivery rates as well as the reputation and performance of our Dispatch infrastructure.

Range of features	
Available for Magento 1 and Magento 2	✓
Transactional email and double opt-in emails	✓
Newsletter registrations and sign-up processes	✓
Integrated registration pages	✓
Dynamic newsletters with shop products	✓
Custom recipient lists	✓
Ability to configure multiple clients	✓
Automatic import of product data	✓
Automatic import of recipient data	✓

Shopware[1, 2]

Take advantage of the performance available from Episerver Campaign in combination with the Shopware e-commerce platform. Recipient data are automatically synchronized, including registrations and canceled subscriptions.

Shopware integration also exports the product catalog from your online shop to Episerver Campaign and makes product data available in your template via a content interface. Use the features of Episerver Campaign to personalize, automate and evaluate newsletters for targeted cross and up-selling. Benefit from high delivery rates as well as the reputation and performance of our Dispatch infrastructure.

Range of features	
Available for Shopware Professional and Professional Plus	✓

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Range of features	
Newsletter registrations and subscription cancellation processes	✓
Transactional emails	✓
Newsletter containing dynamic shop product	✓
Ability to configure multiple clients	✓
Automated, cyclical product data import	✓
Send transactional emails via Episerver Campaign	✓

CRM integrations

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

MS Dynamics CRM[1]

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

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

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Salesforce [1]

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

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

SAP CRM [1, 2]

Transfer your B2B and B2C contacts to Episerver Campaign and keep your marketing permissions up to date. With SAP CRM Integration, you will automatically receive all bounces and unsubscribes.

Range of features	
Available for SAP CRM 7.0	✓
Contact export	✓
Response data import	✓
Secure and automated data transfer via SFTP	✓

APIs

Smart and flexible: Episerver Campaign offers you a range of comprehensive programmable interfaces known as APIs (Application Programming Interfaces) to automate your marketing activities.

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SOAP API[1]

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

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

HTTP API[1]

The HTTP API can be used to register new recipients, manage blacklists and unsubscribe lists, for personalized tracking and for sending trigger and transactional emails – also with personalized attachments. The HTTP API operations can be easily and safely embedded into emails, web forms and online shops.

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

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SMTP API [1]

The SMTP API offers a simple solution for sending your campaigns via the high-performance infrastructure and lets you benefit from the reputation of the Episerver server. After setting up a special SMTP client, you can continue to create your mailings using your usual software package. Mailings are sent via our high-performance server that is recognized by all major providers. This allows you to benefit from the reputation and performance of Episerver Campaign with minimal modifications.

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

Additional interfaces

Content interface [1]

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

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

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Translation interface [1]

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

Range of features	
Data exchange using standard XML format	✓
It is possible to link to practically all translation providers	✓
Automatic creation of mailings in the target language	✓
Automatic requests for the status of a translation ensures that mailings are only sent once the translation is complete	✓

Closed loop interface

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

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

FTP interface

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

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

[1] Setup and use of these features may be associated with additional costs depending on application and selected configuration.
[2] This feature is only available in Germany, Austria and Switzerland.

Dispatch and deliverability

Dispatch

You can send your messages any time you like. This means that you can send high volumes of messages either immediately, delay their dispatch or even split your messages and send different contents to different target groups. You can also test every message before sending it: To do so, select a number of test addresses and lists, start separate tests for text, HTML and multi-part messages, and simulate the messages' dispatch to the different target groups.

Range of features	
Sending speeds of up to 50 million emails per hour	✓
Throttled dispatch (e.g., for campaigns that are likely to generate a high level of traffic to your online shop). Throttled message dispatch will allow you to better control and manage follow-up traffic.	✓
Sending of emails using international ISO-8859-1, ISO-8859-2 or UTF8-compliant character sets	✓
SMS message routing to 12 countries	✓
SMS delivery using international GSM and UCS2 data coding	✓
Target group-based SMS delivery to specific regions using telephone dialing codes[1]	✓
SMS delivery with sender recognition using individual short codes (on request, exclusive code)[1] or long codes[1]	✓
Delivery of print mailings throughout Germany delivered by Deutsche Post AG	✓

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Range of features	
International fax mailings	✓
Target group-based fax delivery to specific regions using telephone dialing codes[1]	✓
Exclude specific regions and special numbers from fax delivery using blacklists[1]	✓

Send time optimization[1]

Customize the time your messages are sent. The send time optimization of Episerver Campaign identifies when your recipients actually use and interact with their inbox and sends your message to each individual recipient at their own individual time – i.e., when the recipient is most attentive.

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

Deliverability management

Episerver's deliverability team constantly monitors mail delivery and takes proactive action to ensure high sending rates at all times. This includes collaborating with providers and organizations to develop optimal strategies for improving deliverability – irrespective of the growing complexities of spam filters.

Range of features	
Active deliverability management and monitoring	✓
On-boarding deliverability – our deliverability team will perform an advance analysis of the specific requirements for ensuring the deliverability of your messages	✓
Episerver is a member of the Certified Senders Alliance (CSA)	✓
Provider relations and Episerver server whitelisting ensure high delivery rates at all times	✓
Mails are sent in compliance with the formatting standards for email headers and email HTML	✓
Automatic steering of the optimal sending speed – ensuring that all emails are accepted by all	✓

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Range of features	
providers	
Automatic server switch in the event of delivery problems to prevent email loss during sending	✓
Blacklist monitoring – our deliverability team constantly monitor the blacklists of all major providers and takes immediate action if an Episerver IP is accidentally listed there	✓
24/7 open and click rate monitoring and provider comparisons for all messages	✓
Progression analysis of open and click rates in your clients to identify and resolve deliverability issues[1]	✓
SSL certificate for your sending domain[1]	✓
Multiple sending domains for your use[1]	✓
Dedicated IP pool for your exclusive use[1]	✓

[1] Setup and use of these features may be associated with additional costs depending on application and selected configuration.

Security and availability

As an Episerver Campaign customer, you benefit from maximum data safety and consistent Episerver software and service availability.

Range of features	
ISO 27001 certified by TÜV to guarantee the security of the operation, service and development of our software	✓
Episerver Campaign software is hosted in a Tier IV high-security data center	✓
Redundant server structure	✓
Continually updated firewall hardware for blocking hackers	✓
SSL-encrypted connections	✓
Split second main database replication	✓
Daily data backup	✓
Automatic application and service availability monitoring	✓

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Range of features	
24/7 system administrator helpline	✓

Recipient management

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

Range of features	
Easy-to-use list-based recipient management	✓
Unlimited number of potential recipients	✓
Unlimited number of recipient lists	✓
Recipient list fields in the data types string, integer, float, date and boolean	✓
Manual recipient import using standard CSV	✓
Automatically import and export recipients using FTP protocol and standard CSV file[1]	✓
Automatic duplicate identification during import	✓
Automatic data validation during import (mandatory fields, correct email addresses etc.)	✓
Download of duplicates and faulty datasets for review and archiving purposes	✓
Export complete and filtered recipient lists	✓
Recipient data encryption[1]	✓
Integrated subscription process based on double opt-in or confirmed opt-in emails	✓
Subscription form[1]	✓
Preference Center form[1]	✓
Tracking-opt-out option that enables recipients to disable personal data tracking in accordance with statutory regulations. This does not impact on anonymized campaign-specific data tracking	✓
Delayed subscription confirmation emails[1]	✓
Integrated unsubscribe request management in accordance with statutory regulations	✓

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Range of features	
Fully integrated unsubscribe links in all mailing templates	✓
Records all subscriptions, opt-ins and unsubscribe requests with IP and time stamp for your records	✓
Separate recipient list data storage available on request[1]	✓
Development of an individual data management concept by our consultants[1]	✓
Recipient data enrichment with third-party system data such as web analytics, CRM, e-commerce, recommendation engines and other data sources using high-performance automated interfaces	✓
Recipient history: Access to the entire message history for each individual recipient in an easy to read format including all action data (opens and clicks)	✓

Blacklist

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

Range of features	
Client-wide blacklist	✓
Blacklist inheritable by sub-clients	✓
Manually add recipients to the blacklist	✓
Manually import blacklisted recipients from a CSV	✓
Search the blacklist for datasets	✓
Delete datasets from the blacklist	✓
Use of wildcards for blocking entire domains or email addresses using key words	✓
Automatic external blacklist cross-checks via interfaces or linked databases[1]	✓
Global blacklist with email addresses that may not be contacted	✓
Automatic feedback-loop recognition and addition to blacklist	✓

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Returned emails and bounce management

Regardless of whether they are hard or soft bounces, or genuine replies: Episerver Campaign automatically filters and processes your returned emails by categories in order to lighten your workload.

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

[1] Setup and use of these features may be associated with additional costs depending on application and selected configuration.

System user and permission management

User management

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

Range of features	
Every user can be assigned up to 214 different permissions	✓
Easy-to manage user roles	✓

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Range of features	
Permissions and user roles can be assigned for specific periods	✓
Every user can be assigned permissions for every client	✓
Every user can be assigned a number of different user roles for every client	✓
User permissions are inheritable by sub-clients	✓
Permissions can be assigned separately for every channel/media type (email, SMS, print, push, fax)	✓
Password and PIN-protected user logins	✓
Users can change passwords at any time	✓

User interface

Intuitive user interface

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

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

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Expandability

Add-ons and custom features

Episerver Campaign can be expanded any time in line with your specific needs and requirements. Thanks to its modular structure, it is easy to add various different special features to Episerver Campaign as and when needed. Apart from our wide range of standard add-ons, we are also constantly developing new customer-specific special features for you.

Range of features	
Over 20 optional add-ons for you to configure in your client at any time	✓
Standardized add-on interfaces, methods and operation, which ensure that add-ons can be easily used with other systems	✓
All customer-specific applications are developed, tested and managed in-house by our project team	✓
Seamless integration of add-ons, customer-specific features and Episerver Campaign‘s standard features	✓
Customer-driven development – Episerver Campaign upgrade and new version development in line with our customers’ ideas, suggestions and requirements. When it comes to the development of our software and services, you – our customers – are key.	✓

Service

Personalized customer service

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

Range of services	
Expert customer services delivered by project managers, engineers and strategy-oriented marketing experts	✓
Multilingual customer services in German, English and Polish	✓
Helpline team available Mon-Fri, 9 AM - 6 PM, by telephone, email and fax	✓
Full-service campaign package – where required, we also offer complete project management of your newsletter mailing campaign, from creating to analyzing your campaign [1]	✓
Customized campaign strategies, designs and analyses with Episerver consulting[1]	✓

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Range of services	
Free regular webinars	✓
Know-how transfer in practice-oriented seminars and workshops[1]	✓
Manuals, specialist documentation and best practice guides	✓
Manuals available offline as PDFs	✓
Video tutorials for quickly getting you started with Episerver Campaign	✓

[1] Setup and use of these features may be associated with additional costs depending on application and selected configuration.

Usage notes

About Episerver Campaign

Episerver Campaign is a professional email marketing software solution. Its primary function is to create, send and evaluate mailings. The software is provided by Episerver GmbH, an Episerver company, as a part of its ASP (Application Service Providing) operations. This means that you only need a web browser and an Internet connection to use the software. The software is available day and night at www.campaign.episerver.net.

It is not necessary to install any software on your computer, as all software functions are operated through your web browser. This also means that you are not tied to your office workstation. You can access Episerver Campaign worldwide from any Internet-capable computer.

Because the software is centrally monitored and maintained by Episerver, you do not have to rely on the resources of your company's IT department to send out mailings. All data you enter or upload is stored on failsafe, redundant servers in a high-security data center, and backups are performed regularly.

Notes on use of the manual

This document is intended to answer any questions which may arise while getting to know Episerver Campaign or during regular use of the software.

In the manual you can find links to related sites that give you further instructions, tips and examples about the manual contents.

You can download the complete manual in PDF format.

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Operating tips

Wizards

Wizards guide you step by step through key features of Episerver Campaign that require a number of inputs and actions. The wizard will help you to master even the most complex functions intuitively. Functions with assistant are, for example, Create Mailing or Import Recipient.

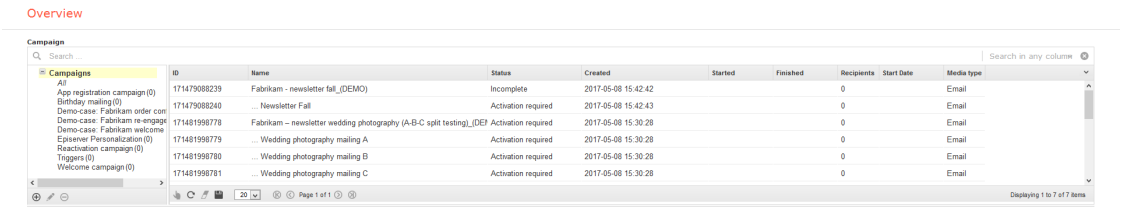
Each step is represented by an individual tab, and these tabs are then worked through from left to right. After a tab has been filled out, clicking Next in the bottom right-hand corner of the window automatically takes you to the next step. Clicking Previous at the bottom left allows you to correct entries from a previous step.

All tabs can also be reached directly by clicking on the corresponding tab.

Lists

Information is provided as a list in many areas of Episerver Campaign, for example, all mailings from the menu item Overview of the menu Campaigns or all recipients from the menu item Overview of the menu Recipients. To make the system as easy to use as possible, these lists all work in the same way.

To display all records of a recipient list, returned emails list or blacklist, you need the respective permissions. If you do not have these permissions, only the first 60 records of a list are displayed.



Customize view

Change column width

To change the width of individual columns, move the mouse pointer over the column separator between two columns until it changes to a horizontal double arrow. Hold the mouse button down and drag the mouse to the left or right until the column has the correct width.

Show and hide columns

To show and hide columns, click the table icon on the upper right corner of the table and select or clear the corresponding check boxes.

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Arrange columns

To arrange the columns, click a column heading and drag the column with the mouse to the desired position.

Sort elements

Clicking on a column heading will sort all records in the list by the content of the selected column. Text fields will be sorted alphabetically, date fields by date. The first click sorts in ascending order, and clicking again sorts in descending order.

Status bar

At the bottom of each list you find a status bar which shows you, how many elements the list contains, on which page of the list you currently are and how many elements have been selected from the list. On the right side of the status bar you find the page navigation buttons. On the left side, the buttons for actualization, printing and exporting a list are displayed.

Page navigation

By default, each list page contains 20 elements. If a list contains more than 20 elements, you can switch between the individual pages by clicking on the arrow symbol on the right in the status bar at the lower edge of the list. Your current position in the list will always be displayed (e.g. Page 2 of 10).

Export lists

You can export records from any list to your local hard drive by clicking on the disk icon in the status bar. The **File Download** window opens. Depending on your browser, you may have to manually click **Download** in a small window first.

In the download window, click **Save**. Select the location on your hard drive where the file should be saved (e.g. the desktop) and give the document a meaningful name. Click **Save** again.

The file is saved as CSV file. This is a common worldwide format for data exchange which can be read equally well by all database systems and Microsoft Excel.

To export recipient lists, returned emails lists or blacklists you need the respective permissions. If you do not have these permissions, lists cannot be exported.

Open CSV files with Microsoft Excel.

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Episerver Campaign creates CSV files in UTF-8 without BOM. Microsoft Excel incorrectly interprets the format as ISO-88591. To correctly open CSV files in Excel, perform the following steps:

1. Open a blank Excel spreadsheet.
2. Click the **Data** tab.
3. In the Get External Data area, click **From Text**.
4. Select the file to open and click **Import**.
5. In the Original data type area, click **Delimited**, set the file origin (character encoding) to UTF-8 and click **Next**.
6. Select the **Delimiters** check box **Semicolon** and click **Next**.
7. Click **Finish**.

Print lists

To print a list, click the printer symbol in the status bar. The list will be shown in a print-optimized format in a new window, and the print dialog opens automatically.

To print recipient lists, returned emails lists or blacklists you need the respective permissions. If you do not have these permissions, lists cannot be printed out.

Update lists

It may be necessary to update a list located in a window which has been open for some time in Episerver Campaign, for example, if several people are working with the system and another user makes changes to the list. To do this, click the button with the circular arrow on the left of the status bar.

List elements

To edit or delete an element from a list, first you must select it. Simply click the corresponding row in the list. The selected element is highlighted with a blue background.

Select multiple elements

Some lists allow selecting multiple elements. Such lists have a check box next to each list item and in the header. To select multiple list items, select the boxes next to the items. Selected items are highlighted with a blue background.

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The single item selection also works in multiple drop-down lists and has priority over the latter. If multiple items from a list have been selected you click a single element, the former are deselected and only the latter remains selected.

Add element

Many lists have a button to add elements to the list, e.g. the list of all recipients. Clicking on this button will add an empty row to the list in which you can make all necessary entries. Fields in which entries can be made are shown with a black border. Click in the field with the mouse to make an entry. Other fields cannot be edited.

Once you have made your entries (you may also leave some fields empty), click Apply below the row. The data record has now been saved.

The data record may not be visible after saving. However, this does not mean that it was not saved. The reason for this is that the list has been sorted (either through your own action or by the system through a default setting). Each new data record is automatically sorted into its correct position in the list after it is created, which may cause it to seemingly "disappear."

Edit element

Many lists have a button which allows an element to be modified. Selecting an element and clicking the button will show a black border around all fields which you can edit. Click in the field with the mouse to make changes. To save your settings, click Apply below the row.

Instead of clicking the Edit button, you can also double click the row to be edited to enter the edit mode.

Delete element

Many lists have a button to delete an element. First, select the object to be deleted, and then click Delete. Confirm the security confirmation dialog with OK.

Folders

In some parts of Episerver Campaign, e.g. the menu item Smart Campaigns of the Campaigns menu and Target groups, you will find an additional list to the left of the main list. This makes it possible to file the elements in the main list in folders, which is helpful if your list contains a large number of elements.

Clicking the folder symbol in the status bar of the main list shows or hides the folder list. When you hide it, the main list can most probably be displayed in full, so that you don't need to scroll horizontally to view all columns.

Initially there is just the folder All. It is always there and cannot be deleted. It is a *meta- folder* showing all existing elements, regardless of what folder you might have moved a single element to.

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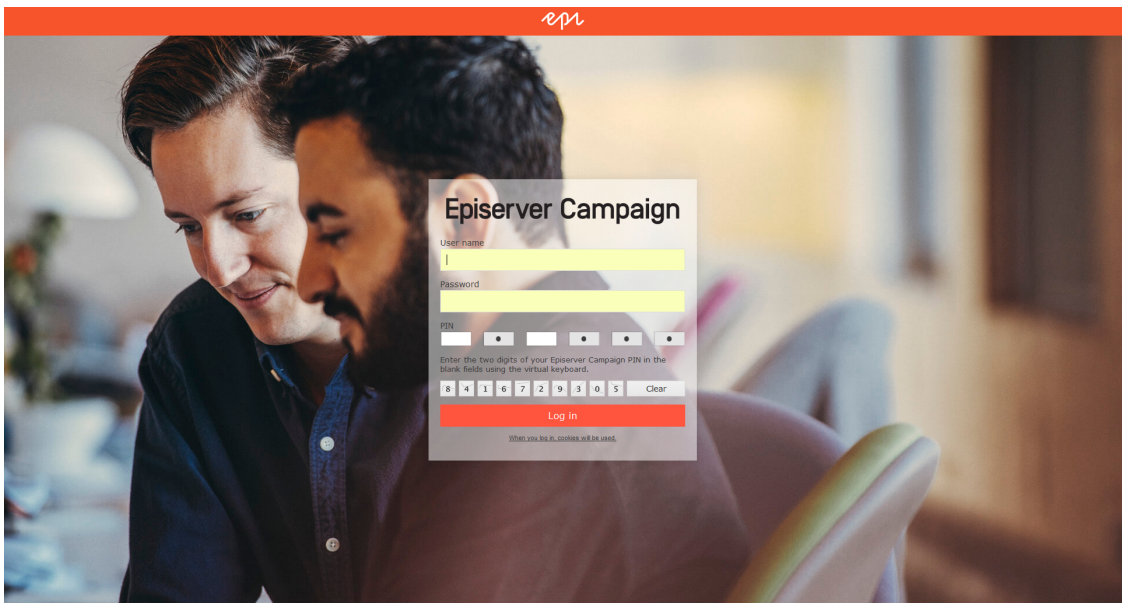
The number of all elements contained in a folder is displayed in brackets behind the folder name. The number of elements that are contained in the subfolders is not displayed in a parent folder .

To create a new folder, click the + symbol in the status bar of the folder list, enter a name for the folder and click Apply . The folder will be created within the folder that was highlighted (marked in bold type) when you clicked the + symbol. To delete a folder, highlight it and click the - symbol in the status bar.

To change a folder's name, highlight it and click the edit symbol (pen and paper) in the status bar. To move a folder, highlight it and click the crossed arrow in the status bar. Then click the folder that you want to move the original folder into.

To move one or more elements of the main list into a folder, highlight the elements and click the crossed arrow in the status bar of the main list. Then click the folder you want to move the elements to.

Login and logout



To log in to your client, perform the following steps:

1. Open the Episerver Campaign website www.campaign.episerver.net in your web browser.
2. Enter your user name and password in the respective fields.
3. Each time you log in to Episerver Campaign www.campaign.episerver.net, you will also be asked to enter two digits of your PIN using the virtual keyboard. Be aware that the numbers on the virtual keyboard are placed in a random order rather than in an ascending order. The keyboard of your PC cannot be used for this purpose. The PIN query serves to verify your identity and prevents from spying your user data by malware.

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→ 4. Click Log in.

✔ This option establishes a secured data transfer.

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

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

Episerver Campaign asks you **only at login** to enter two digits of your PIN. Never enter your entire PIN. If you receive an email asking you for your PIN or other login data, do not answer this email at any circumstances and inform our customer support immediately.

First login

You must activate your account before the first login.

You will receive two emails from Episerver: an activation email and a separate email containing your personal activation key.

→ 1. Open the activation email and click **Activate user account**.

→ 2. Enter the activation key that you will find in the second email, and then click Continue.

→ 3. Complete all the form fields and click Continue.

→ 4. Create a password and a PIN and click Save.

✔ After you have completed the entries, you will receive another email asking you to confirm your activation.

→ 5. Confirm your activation by clicking **Confirm activation** in the email.

✔ You can then log into Episerver Campaign at www.campaign.episerver.net.

Change password or PIN

See the Change password or Change PIN sections.

Logout

→ End every session by logging out. This prevents third parties from accessing the system from your computer. In the menu bar, in the profile area, click Logout and confirm with Close application.

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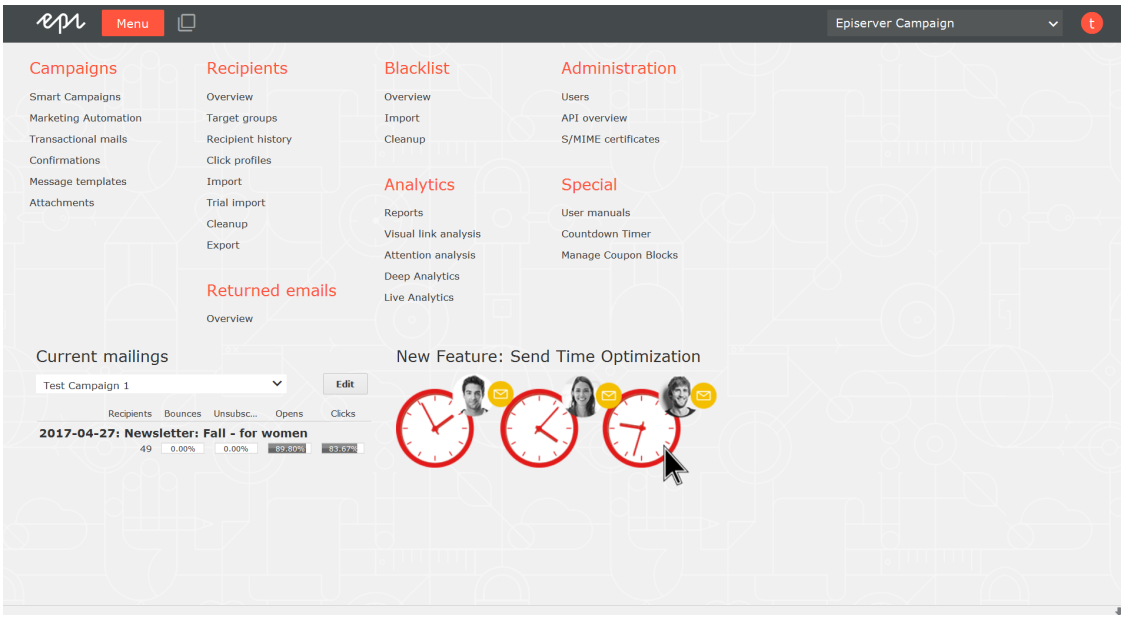
Start menu



The start menu is the central area of Episerver Campaign. It allows you to:

- navigate to all features available in your user account
- quickly jump to and edit your current campaigns
- view important dispatch information about your current messages

➜ To open the start menu, use your access information to log into your user account.

✔ The start menu is always the first window that opens once you have successfully logged in.

➜ To return to the start menu after navigating away from it while using Episerver Campaign, in the menu bar, click Menu.

✔ This will take you back to the start menu.

Navigating to features

The various features of Episerver Campaign are grouped together into related areas on the start menu to give you an overview of what is available:

Campaigns	Smart Campaigns, Marketing Automation etc.: This section contains all the tools you need for creating campaigns.
Recipients	Manage your recipients and target groups.
Returned	Manage and act upon direct replies from your recipients, auto-responders and

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emails	bounces.
Blacklist	Your blacklist – manage recipients who no longer wish to receive messages.
Analytics	Access the powerful reporting tools available in Episerver Campaign.
Administration	This section allows you to manage user roles and permissions, your APIs and field functions.
Special	Gives you access to the online help, special features such as e-commerce integrations and the coupon system.

The range of features shown depends on the user account and the chosen package as well as the individual permissions of the user. Features are hidden if they are not included in your user account or a user does not have permission to use them.

→ To navigate to a feature, click the corresponding link in the start menu.

✔ The feature window opens.

→ To return to the start menu, in the menu bar, click Menu.

The menu bar is always available at the top of the screen. This allows you to return to the start menu at any point while using Episerver Campaign.

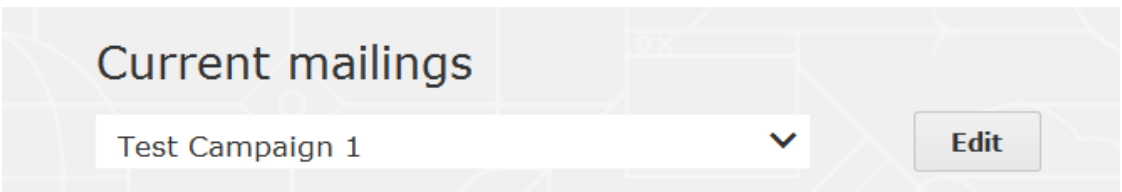
Jump to recent campaigns

The start menu provides quick access to edit your last four campaigns. To jump directly into edit mode for a recent campaign, perform the following steps:

→ 1. Under **Current mailings**, choose a campaign from the drop-down list.

→ 2. Click Edit.

✔ The **Edit campaign** window opens. You now can start working on the selected campaign.



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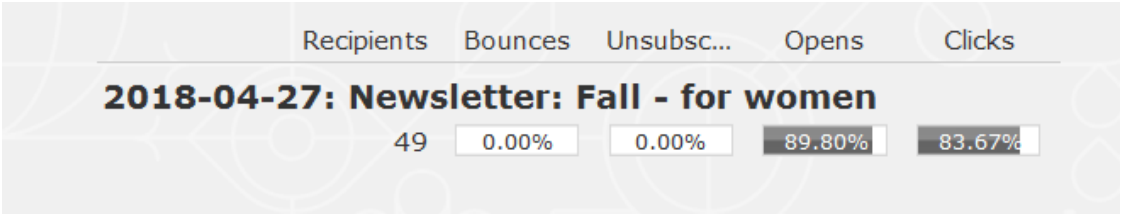
Dispatch information about your recent messages

Information about the last four messages you sent is displayed below the campaign quick access option.

The table shows you the number of recipients, the bounce rate, the unsubscribe rate, the opening rate and the click rate.



Menu bar

The menu bar is the main navigation tool in Episerver Campaign. You will find the menu bar above each window in Episerver Campaign. The menu bar is never hidden. Using the menu bar you can:

- access the start menu from any location,
- use the window chooser to manage open windows,
- switch clients (if you have more than one client set up in your user account),
- access your profile area.

Access the start menu

➜ To access the start menu, in the menu bar, click Menu.

✔ The start menu opens.

You will find detailed information about the individual features on the start menu in the Start menu chapter.

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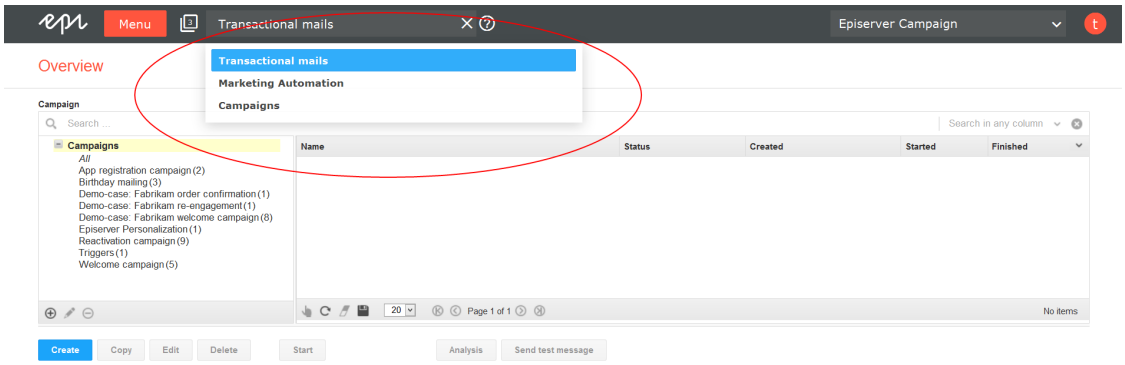
Window chooser



The window chooser in the menu bar lets you control all open windows in Episerver Campaign to:

- see the number of open windows
- switch between open windows
- close open windows
- get help about the Episerver Campaign feature

> The forward and back buttons in your browser should not be used for navigating between windows in Episerver Campaign. Only use the window chooser in the menu bar. If you use the forward and back buttons in your browser, any unsaved work may be lost.

See the number of open windows

A number on a stack symbol is shown next to the Menu button. This number indicates how many windows are open. For example, if two windows are open, you will see a 2 on the stack symbol. If three windows are open, you will see a 3, etc.

Switch between open windows

To switch between open windows, perform the following steps:

→ 1. Click the stack symbol with the number on the menu bar. Alternatively, you can also click on the name of the open window next to the stack symbol.

✔ A drop-down list with all open windows appears.

→ 2. In the drop-down list, select the window you wish to switch to.

→ 3. Confirm your selection by clicking on the name of the open window you wish to switch to.

✔ You have successfully switched to another window.

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Close windows

To close open windows, perform the following steps:

1. Save your work in the window you want to close.

> Any unsaved changes will be lost when you close an open window.

2. In the window chooser, click the X next to the name of the open window.

✔ You have successfully closed the window.

You will be automatically taken to the last window you opened. If you close a window when there is only one window open, then the start menu will open.

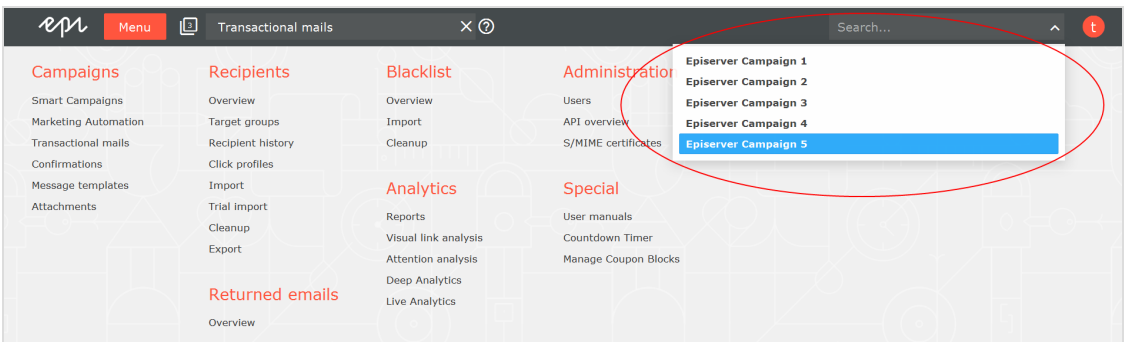
Get help about the Episerver Campaign feature

The window chooser provides you with quick access to our online help. This quick access feature is context-sensitive and will take you directly to the documentation related to the feature for the window you have open. This means you do not need to search through the online help for a particular chapter. You can get straight to the information you need with a single click.

To use quick access to our online help, in the window chooser, click .

✔ The online help opens in a new tab.

Change client



If you have several clients set up in your user account, you can switch between them in the menu bar. You do not need to log out and log back in again. To change to another client, follow these steps:

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1. Save your work in the client you wish to leave.

Unsaved changes will be lost when you change to another client.

2. In the menu bar, click the downwards facing arrow next to the name of the active client.

✔ A drop-down list appears containing the clients available in your user account.

3. Select the client that you want to change to.

4. Confirm your selection by clicking Change client.

✔ You have successfully changed the client.

When you click on the downwards facing arrow, the display with the client name changes into a search field. Here, you can alternatively enter the name of the client to which you wish to change.

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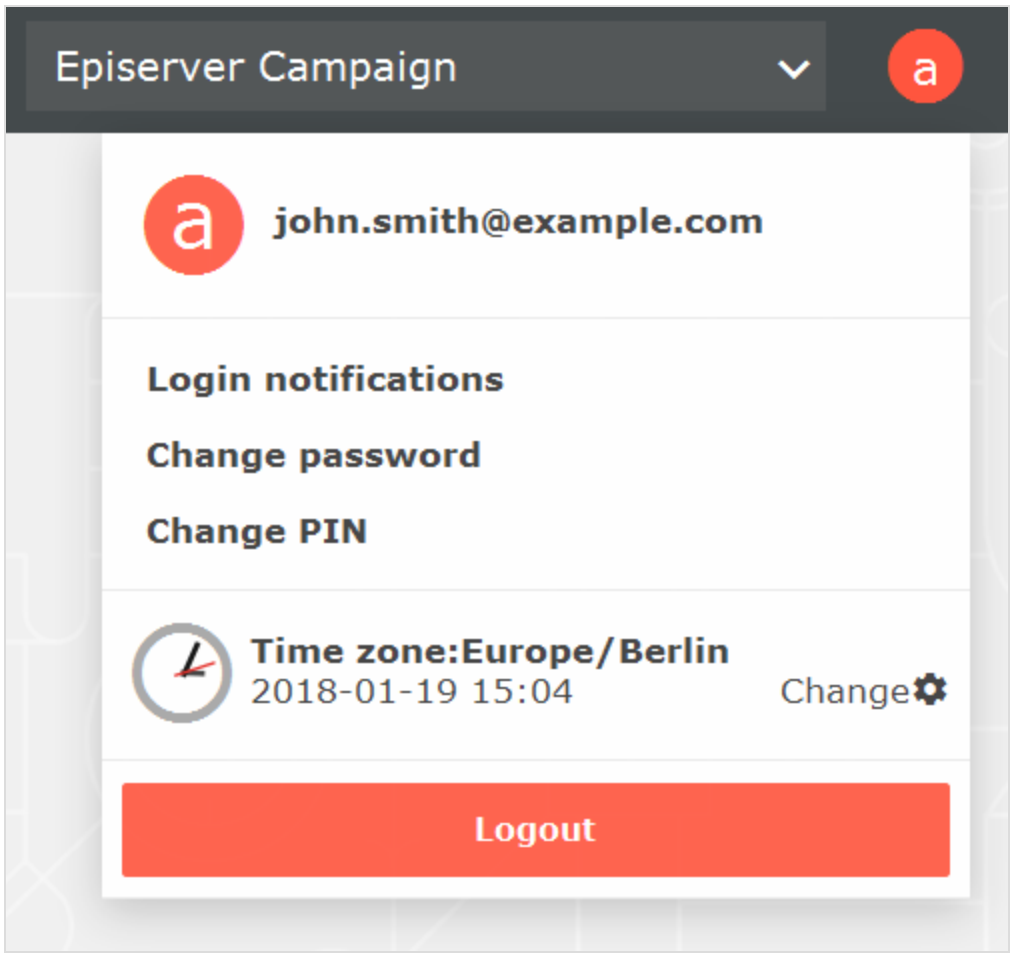
Profile area



Your personal profile area is your command center where you can manage user settings and find out important information. You have access to the following features:

- information about the logged-in user
- activate and deactivate automatic login notifications
- change your password
- change your PIN
- change the display language
- display and change the time zone
- end your current session and log out

➜ To display your personal profile area, in the menu bar, click on the red circle next to the client display.

✔ Your personal profile area opens.

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The red circle contains a letter. This is the first letter of the email address for the logged in user.

The following explains how to change settings in your personal profile area and the important information you can find for working with Episerver Campaign.

Email address and name of the user

The first section of your personal profile area shows the email address of the logged in user. This email address is also their Episerver Campaign user ID.

If you also provided the name of the user along with their email address when setting up the user account, then this name will appear below the email address.

Login notifications

Each time you successfully log into Episerver Campaign you will receive an automatic login notification by email. You also receive an automatic email notification each time you fail to log in e.g. if you entered your password incorrectly.

To enable or disable automatic login notifications, perform the following steps.

→ 1. In your personal profile area, click **Login notifications**.

✔ The **Edit login notifications** window opens.

→ 2. To activate automatic login notifications, select the check box next to **Activate login notifications**. To deactivate automatic login notifications, clear the check box next to **Activate login notifications**.

Our recommendation: Leave automatic login notifications enabled so that you are informed about each login and login attempt. You will quickly know when unauthorized persons attempt to log into your user account and can take action to prevent this. If you see any suspicious logins and login attempts, contact Episerver Campaign customer support immediately.

Change password

To change your password, perform the following steps:

→ 1. In your personal profile area, click **Change password**.

✔ The **Change Password** window opens.

→ 2. In the **New password** field, enter your new password.

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→ 3. In the **Re-enter new password** field, re-enter your new password.

→ 4. In the **Security questions** section, in the **Current password** field, enter your old password. Under **Current PIN**, enter the two missing digits from your PIN by clicking on the corresponding numbers in the number row below. If you make a mistake, click Clear and re-enter the digits.

→ 5. On the bottom right of the window click Save.

✔ A new window opens notifying you that your password has been changed and that you will shortly receive a confirmation link by email.

→ 6. Open your email inbox and in the confirmation email from Episerver click Confirm password.

✔ You can now log in to Episerver Campaign with your new password.

Change PIN

To change your PIN, perform the following steps:

→ 1. In your personal profile area, click **Change PIN**.

✔ The **Change PIN** window opens.

→ 2. In the **New PIN** field, enter your new PIN. Click on the corresponding numbers in the row of numbers below. If you make a mistake, click Clear and re-enter your PIN.

→ 3. In the **Repeat new PIN** field, re-enter your new PIN.

→ 4. In the **Security question** section, in the **Current password** field, enter your password. Then under **Current PIN** enter the two missing digits from your old PIN by clicking on the corresponding numbers in the number row below.

→ 5. On the bottom right of the window click Save.

✔ A new window opens notifying you that your password has been changed and that you will shortly receive a confirmation link by email.

→ 6. Open your email inbox and in the confirmation email from Episerver click Confirm PIN.

✔ You can now log in to Episerver Campaign with your new PIN.

Display language for the Episerver Campaign interface

You can change the display language for the user interface to one of the following languages supported Episerver Campaign: German (Deutsch), English, Dutch (Nederlands) or French (Français).

Save your work before you change the language. Unsaved changes will be lost when you change the Episerver Campaign user interface to a different language.

To change the display language of the Episerver Campaign user interface, perform the following steps:

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→ 1. In your personal profile area, click the desired language.
✔ A dialog box opens.
→ 2. Click the blue button to confirm your language selection.
✔ You have now successfully changed the language of the Episerver Campaign user interface.

The blue confirmation button is already labeled in the language that you wish to change. For example, if you change from German to English, the button is labeled Change language. If you change back to German, it is labeled Sprache ändern.

Time zone

To set the right dispatch time for your messages, change the time zone to your local time.

→ 1. Click **Change** next to **Time zone**.
✔ The **Change time zone** window opens.
→ 2. Select your time zone from the drop-down list.
→ 3. Click Change time zone.
✔ You have successfully changed the time zone to your local time.

System time

If the time zone support is **not** activated in your client, the profile area shows the system time for the Episerver data center location. This corresponds to central European time (CET) and may be different from the time at your location. For example, if you are in London (one hour behind CET) and set a dispatch time of 17:00 h, then Campaign will send the message at 18:00 h your time. On the other hand, if you are in Istanbul (one hour ahead of CET) and set a dispatch time of 17:00 h, Campaign will send your message at 16:00 h your time.

Also be aware that daylight savings time may vary the time by an additional hour compared to your time zone.

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

Logout

To end your current session and log out of Episerver Campaign, perform the following steps:

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1. In your personal profile area, click Logout.

✔ A dialog box opens.

2. Confirm that you want to log out by clicking Close application. If you do not wish to log out, click Keep working.

Save your work before you log out. Unsaved changes will be lost when you confirm the logout.

Clients

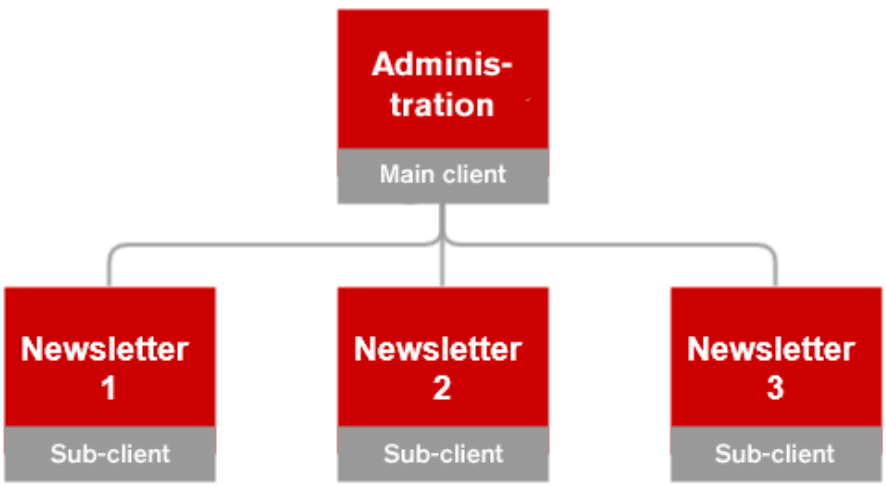
The working environment of Episerver Campaign is known as a **client**. A client is a stand-alone and closed system that serves to organize your mailings. As a user of Episerver Campaign, you have the option to use one or more clients for your scenario.

Client hierarchy

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

Coordinated clients

If you are setting up multiple clients on a single tier, it is useful for rights management purposes to create a main client. In this way you can centrally control the rights for any users receiving access to all clients. A coordinated client structure may look as follows:



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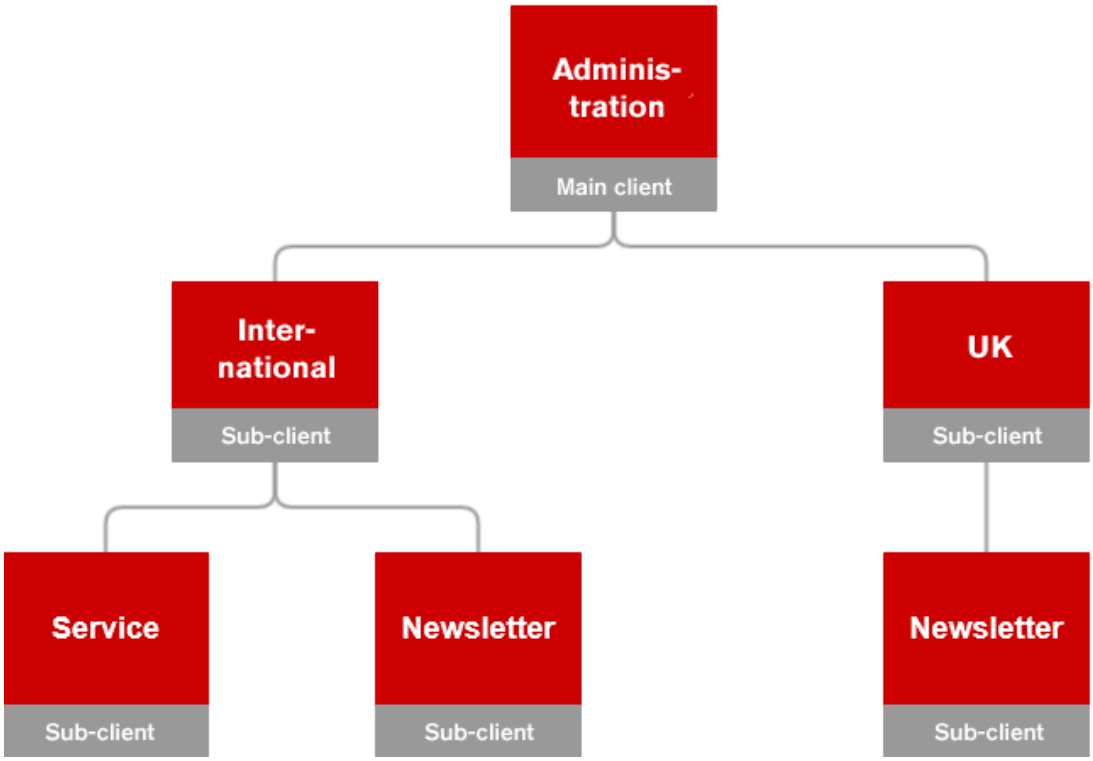
Subordinate clients

When using multiple clients, you can order them hierarchically. Each client inherits the rights and blacklist from all its parent clients. A hierarchical client structure may look as follows:



Decision guidance: One client or multiple clients?

Each user has client-wide permissions. This means that the user can view and edit all mailings and recipient lists in a client. It makes sense to create different clients if you have to send a number of newsletters which can be worked on by different editors. This is recommended if, for example, an editor should not be able to make changes to content for which they are not responsible.

User

Theme	Single client	Multiple clients
User	If you are managing different brands in a single client, a user working on a particular brand has access to all mailings for other brands within your client.	If you are managing each brand in a different client, then users working on a particular brand can only see mailings for that brand.
User rights	All user rights always apply to an entire client. Depending on the customer's scenario, it is possible to allow access to all recipient lists or, alternatively, to	By default, user rights are inherited by all sub-clients. Should it be

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Theme	Single client	Multiple clients
	prevent access to any lists. Depending on the customer's scenario, access to all mailings is also possible – or alternatively no access to any mailings.	desired, we can configure it so that this is defined separately for each user. Customer support will happily put together an offer for you.

Recipients

Theme	Single client	Multiple clients
Recipient lists	With one client it is possible to send different newsletters using different recipient lists. A recipient list can, for example, represent a brand, country or business unit.	The possibilities increase accordingly with multiple clients.
Blacklists	Blacklist entries always apply to an entire client. This functionality cannot be changed.	Blacklist entries are always inherited by, and therefore apply to, all sub-clients. This functionality cannot be changed.
Subscription cancellations	Subscription cancellations generally apply to the entire client. If desired, we can adjust this functionality so that cancellations only apply to the recipient lists concerned. Customer support will happily put together an offer for you.	Cancellations generally only apply to individual clients when multiple clients are in use.
Bounces	Recipients that exceed the bounce limit are always removed from future sending attempts for the entire client. This functionality cannot be changed.	This also applies when multiple clients are in use.

Domain

Theme	Single client	Multiple clients
Sending domain	Only one sending domain can be used in a client by default (e.g., @example.de). If desired we can adapt this functionality to allow you to use as many different sending domains as required (with a tracking domain). Customer support will happily put together an offer for you.	With multiple clients, you can have each client use its own domain with a respective tracking domain.
Tracking	In principle, it is only possible to use one tracking domain per	An additional tracking

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Theme	Single client	Multiple clients
domain	client. This functionality cannot be changed.	domain can be used for each additional client.

Mailing

Theme	Single client	Multiple clients
Field functions	Field functions can be used by default.	Field functions can be inherited by sub-clients by default. If desired, this functionality can be adapted for each field function separately. Customer support will happily put together an offer for you.
Deep analytics	Using Deep Analytics, you can create reports from within a client.	Using Deep Analytics, you can create reports from within a master client for all sub-clients.

Client setup

The client setup includes the following tasks and topics:

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

On behalf of our deliverability and quality management, Episerver checks a random sample of the recipient records of each new client. This check is mandatory. The dispatch will be enabled after this recipient records check. All other functions of your client can already be used, even if the recipient records check has not been finished yet.

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Setup sub-clients and additional clients

If you already have a Episerver Campaign client and wish to set up another client (usually, a sub-client), contact customer support to discuss which settings can be inherited or copied from your existing client. Thus, the setup process will be much faster and simpler.

Users

With the user administration tool from Episerver Campaign, you can set up and manage user accounts for Episerver Campaign.

Each user account (and therefore each system user) can be granted a variety of permissions.

User permissions apply to clients and/or sub-clients. The same user can be granted different permissions in different sub-clients (provided sub-clients are being used).

Examples of typical user accounts:

- **Editor**: The editor is authorized to insert text and images but is not able to start mailings or view reports.
- **Marketing assistant**: The marketing assistant is authorized to import new recipients but is not authorized to edit content or download an entire recipient list.

Manage users

→ To manage users, open the start menu and, in the **Administration** menu, click **Users**.

✔ The **Manage users** window is divided into two tabs:

- Users by client: This tab shows all users with permissions in a specific client.
- Clients for user: This tab shows all clients where a specific user has permissions.

Users by client

Use the buttons shown below the overview to perform the following actions for the users:

- Create user
- Manage permissions
- Reset user password and PIN

Create user

To create a new user, perform the following steps:

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1. Click Create user.

✔ The **Manage permissions** window opens.

2. Enter the user's email address (which will then serve as the user name), language, gender, first name, last name and telephone number.

3. To send an activation email to the user, select **Send activation email**.

4. Click Manage permissions.

5. In the **Assign roles** area, you have the option of assigning a role to the user. To do so, perform the following steps:

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

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

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

   You may assign multiple roles to a single user.

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

> Permissions can be granted explicitly ( ), revoked explicitly ( ), or inherited (,). You can expedite the process of assigning permissions by using hereditary permissions. To do so, you need to grant or revoke a higher-level permissions and all the subordinate permissions inherit this status.

> You cannot grant or revoke permissions that you do not possess yourself. Such restricted permissions are marked with the icon.

7. Click Confirm.

✔ A summary of the changes to be made is displayed.

8. Click Finish.

✔ A summary of the changes you just made is displayed.

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The user will receive an activation email containing an activation link. Once the user has clicked this link, the user must activate their user account using their personal activation key.

If a personal activation key is not available, contact the Episerver customer support team by telephone.

Once activated, the user receives a confirmation email with a confirmation link that must be clicked to complete the activation.

It is then possible to log into Episerver Campaign.

Manage permissions

To edit a user's permissions settings, perform the following steps:

1. In the list, click on the user whose permissions you want to edit.
2. Click **Manage permissions**.

✔ The **Manage permissions** window opens.

3. In the **Assign roles** area, you have the option of assigning a role to the user. To do so, perform the following steps:
   a. In the **Available roles** list, on the left side of the screen, click the role you want to assign to the user and then click `>`.

      You cannot assign or revoke roles that contain permissions you do not possess yourself.

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

      You may assign multiple roles to a single user.
4. In the **Assign permissions** area, click on the permissions you want to grant to the user.

Permissions can be granted explicitly ( ), revoked explicitly ( ), or inherited (,). You can expedite the process of assigning permissions by using

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hereditary permissions. To do so you simply need to grant or revoke a higher-level permissions and all the subordinate permissions inherit this status.

You cannot grant or revoke permissions that you do not possess yourself. Such restricted permissions are marked with the icon.

5. Click **Confirm**.

✔ A summary of the changes to be made is displayed.

6. Click **Finish**.

✔ A summary of the changes you have just made is displayed.

Editing permissions for multiple users

You can edit multiple users by selecting the check boxes next to the users. You can only assign roles when editing multiple users. You cannot grant or revoke individual permissions.

Reset user password and PIN

To reset a user's password and PIN, send an activation email to the user:

1. In the list, click on the user whose password and PIN you want to reset.
2. Click **Send activation email**.

✔ A confirmation dialog box containing additional information opens.

3. Click **Send activation email**.

✔ An activation email containing all necessary information for the reactivation is sent to the user.

Clients for users

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

Use the buttons shown below the overview to perform the following actions for the user:

- Assign new client
- Manage permissions

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Assign new client

To assign a new client to a user, perform the following steps:

1. Click Assign new client.

✔ The **Manage permissions** window opens.

2. Select the check box next to the client that you want to assign to the user. You can select multiple clients.
3. Click Manage permissions.
4. In the **Assign roles** area, you have the option of assigning a role to the user. To do so, perform the following steps:
   a. In the **Available roles** list, on the left side of the screen, click the role you want to assign to the user and then click `>`.

      You cannot assign or revoke roles that contain permissions you do not possess yourself.

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

      You may assign multiple roles to a single user.
5. In the **Assign permissions** area, click on the permissions you want to grant to the user.

Permissions can be granted explicitly ( ), revoked explicitly ( ), or inherited (,). You can expedite the process of assigning permissions by using hereditary permissions. To do so, you need to grant or revoke a higher-level permission, and all subordinate permissions inherit this status.

You cannot grant or revoke permissions that you do not possess yourself. Such restricted permissions are marked with the ( ) icon.

6. Click Confirm.

✔ A summary of the changes to be made is displayed.

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→ 7. Click Finish.

✔ A summary of the changes you have just made is displayed.

Manage permissions

To edit a user's permissions in one (or several clients), perform the following steps:

→ 1. Select the check box next to the client that you want to assign to the user. You can select multiple clients.

→ 2. Click Manage permissions.

✔ The **Manage permissions** window opens.

→ 3. In the **Assign roles** area, you have the option of assigning a role to the user. To do so, perform the following steps:

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

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

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

You may assign multiple roles to a single user.

→ 4. In the **Assign permissions** area, click on the permissions you want to grant to the user.

Permissions can be granted explicitly (), revoked explicitly (), or inherited (,). You can expedite the process of assigning permissions by using hereditary permissions. To do so, you need to grant or revoke a higher-level permission, and all subordinate permissions inherit this status.

> You cannot grant or revoke permissions that you do not possess yourself. Such restricted permissions are marked with the icon.

→ 5. Click Confirm.

✔ A summary of changes to be made is displayed.

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→ 6. Click Finish.

✔ A summary of changes you just made is displayed.

Permissions

The user administration of Episerver Campaign permits a very customized assignment of permissions for individual modules, functions and activities. The following list includes the most important individual permissions:

- Create mailings
- Edit mailings
- Dispatch mailings
- Import recipients
- Clear recipient lists during import
- Export active recipients
- Export responses
- Export unsubscribers
- Export blacklist

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

How can I change my own permissions?

If you require further permissions for your work with Episerver Campaign, or if you need permissions for further clients or sub-clients, contact a user with administrator rights or our customer support.

How can I change the permissions of other users?

You need administrator rights for your clients for this. In the **Manage users** menu item, you can edit the permissions of all users for your client.

You can only edit other users' permissions if you have these same permissions. That is, you cannot assign permissions that you do not have yourself.

Roles

You can assign permission profiles, called **roles**, to individual users on either a temporary or permanent basis. A role may contain the same permissions as an individual user. You can define roles in your client for specific tasks or projects to simplify the process of managing individual users. Once you have created a role, you can assign it to a user either permanently or for a specified period of time, e.g. for holiday replacements or temporary users.

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Tips for using roles

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

Permissions in roles do not apply if

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

Manage roles

To manage roles, open the start menu and in the **Administration** menu, click **Roles**.

Use the buttons shown below the overview to perform the following actions for the roles:

- Create
- Edit
- Delete
- Show usage

Create

To create a new role, perform the following steps:

1. Click Create.
2. In the **Role name** box, enter a name for the role.
3. In the **Permissions** area, click the permission you want to assign to this role.

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→ 4. Click Create .

✔ The role will be created and can then be used.

Edit

To edit a role, perform the following steps:

→ 1. In the list, click the role you want to edit.

→ 2. Click Edit .

✔ The **Edit role** window opens.

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

→ 4. Click Save .

✔ The changes to the role are saved.

Delete

You can only delete a role if no users have been assigned to it. The simplest way to see how a role is being used is by clicking the button Show usages .

To delete a role, perform the following steps:

→ 1. In the list, click the role you want to delete.

→ 2. Click Delete .

✔ A confirmation window opens.

→ 3. Click OK .

✔ The role is deleted.

Show usage

To show the usage of a role, perform the following steps:

→ 1. In the list, click the role you want to view.

→ 2. Click Show usages .

✔ The **Role usage** window opens, displaying a list of all users who have been assigned this role.

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You can also use this window to edit a user's permissions. To do so, click on the user and then on Edit user permissions. Then, follow the steps described in the Users section.

Exclusive IP addresses

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

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

A Return Path certification requires exclusive IP adresses.

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Omnichannel campaigns

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

- Omnichannel information center: Special notes for print, push messages, SMS and fax.
- Smart Campaigns: Creating, editing and dispatching one shot campaigns.
- Marketing automation: Automating campaigns.
- Transactional mails: Setting up and editing transactional mails.
- Confirmations: Editing opt-in emails.
- Message templates: Creating and editing message templates.
- Mailings Classic: Full information about our classic one-shot campaign, Mailings Classic.
- Split dispatch: Setting up and executing A/B tests.
- Send time optimization: Delay the sending of your message until the exact moment when your recipients open their inbox and read their emails.
- Validate mailing prior to dispatch: Information on the automatic parameter test before dispatch.
- Send automatic notification after dispatch: Information on automatic notification after dispatch.

Omnichannel information center

This section contains special notes for the print, push, SMS, and Fax channels.

- Episerver Print[1]
- Episerver Mobile Push
- Episerver SMS
- Episerver Fax[2]

[1] This feature is only available in Germany.
[2] This feature is only available in Germany, Austria and Switzerland.

Episerver Print

Read the Information about print messages chapter first and follow the instructions and limitations.

To create a new message of the type **Print**[1], perform the following steps:

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→ 1. Open the start menu and in the **Campaigns** menu, click **Smart Campaigns**.

✔ The **Overview** window opens.

→ 2. Click Create.

✔ The **Select campaign draft** window opens.

→ 3. In the **Draft** drop-down list, select the `--- Empty draft ---` option and click Apply.

✔ The **Create campaign** window opens.

→ 4. Add all desired nodes to the campaign (see the Smart Campaigns chapter).

→ 5. Drag the **Print** node from the left action area to the working area on the right and click Edit content.

✔ The **Edit content** window opens.

→ 6. Follow the steps as described in the Edit message content.

[1] This feature is only available in Germany.

Information about print messages

Before sending a Print message

When preparing a Print message to ensure that printing, packaging and dispatch run smoothly, print messages must comply with Deutsche Post AG's standards for automated letter delivery (PDF brochure). Failure to comply with these standards may result in letters being undeliverable. Detailed information can be found in the brochure for automated mail delivery (in German).

Recipients

Print messages can only be delivered where the full postal address of the recipient is provided. Print recipient lists contain all required and options fields. The following list shows which fields are mandatory and which are optional:

Field name	Optional/mandatory	Notes
Title	optional	
First name	optional	

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Field name	Optional/mandatory	Notes
Last name	Mandatory field	Mandatory field for all addresses. If you wish to use only the company name for business addresses (without providing the name of a member of staff), this must be entered here.
Extra address line	optional	If this is a business address and you have entered the name of a staff member in the **last name** field, then enter the company name into this field. The letter cannot be delivered without this.
Street	Mandatory field	Mandatory field along with **Number**. The **Street and number** field as well as **PO box** must be left empty.
Number	Mandatory field	Mandatory field along with **Street**. The **Street and number** field as well as PO box must be left empty.
Street and number	optional	When using this field, the **Street**, **Number** and **PO box** fields must be left empty.
PO Box	optional	When using this field, the **Street**, **Number** and **Street and number** fields must be left empty.
Postcode	Mandatory field	
Town/City	Mandatory field	
Country code	Mandatory field	Contains the country code This field is must be completed with DE. Mail can only be sent

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Field name	Optional/mandatory	Notes
		within Germany.

Dispatch

- The **cheap dispatch** option is permitted only for purely promotional communication (e.g. direct suggestions to buy, offers or calls for donations). The delivery is generally made within six working days from when the mailing starts.

  To send a print message with the delivery type **cheap delivery**, a minimum amount of 500 dispatches is required.

- The **fast dispatch** option is selected by default. The delivery is typically made within two working days if the mailing is started before 20:00 h (CET). Delivery may happen on the third working day in exceptional cases or where the mailing is started after 20:00 h.
- Delivery times specified are for guidance only. Delivery times for individual items may vary. When sending letters such as birthday cards by post, no guarantee can be made that delivery will be made on a specific day.

Undeliverable letters

- Undeliverable letters will be charged for in full.
- Undeliverable letters sent via **cheap dispatch** will be shredded.
- Undeliverable letters sent via **fast dispatch** will be returned to the sender.
- If restrictions are not observed (see cheap dispatch) or you fail to comply with automated delivery requirements, then additional postage may be charged on letters.

Images and graphics

- Images and graphics in GIF, PNG, JPG and TIFF formats are supported. For the best print results we recommend using only the JPG or TIFF formats.
- If you are using borderless background graphics then these must be created with a 2 mm overflow. This means that if you want to print a borderless image on a DIN A6 postcard (148.5 mm x 105 mm), you need to upload a graphic measuring 152.5 mm x 109 mm.

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- The front side of postcards and the header on letters are divided into zones which are subject to a few restrictions on the fonts, colors, symbols and images that can be used. These restrictions are explained in the following section.
- Upload images and graphics in a resolution suitable for printing. Episerver Campaign supports images with resolutions from 150 dpi to 300 dpi. The maximum allowed file size in both cases in 8 MB.

Colors

- Printing is done using four-color laser printing.
- Both RGB and CMYK color spaces are supported for images, graphics and font colors. All images, graphics and font colors are converted to CMYK for printing.
- On screen view uses sRGB. Color variations between what is seen on screen and the actual print may occur as a result. We always recommend doing a test print and a test dispatch to check the colors on the print.
- If you are using images, graphics and font colors in RGB, then these require an embedded color profile to ensure the conversion can be done correctly. You can use any RGB color profile for this. Conversion to CMYK is carried out automatically by Episerver Campaign into the **ISO Coated v2 (ECI)** ICC profile with a "perceptive" rendering intent.
- If you are using CMYK images and graphics, then these must be created with the **ISO Coated v2 (ECI)** ICC profile and the color profile embedded in the file.

Print formats and dimensions

- Each print format has its own template available. Only templates that fit the selected format are available from the **Start** tab.
- If you have selected the **DIN A4 letter** format, the editor will show dotted lines at the points where the letter is folded to fit into the envelope. DIN A4 letters are folded using a letter fold.
- Distances and margins must always be specified in centimeters (cm). Do not provide any measurements in pixels (px).
- Always specify font sizes and line heights in points (pt). Do not provide any measurements in pixels (px).
- The following dimensions and distances apply (all information in millimeters):
  - Letter DIN A4
  - Postcard DIN A6
  - Postcard DIN lang

Letter DIN A4

The letter DIN A4 is printed on white paper (90 gsm, matt profi silk) using four-color laser printing. Borderless print (background graphics) is possible. Letterheads (i.e. the area above the first fold) have

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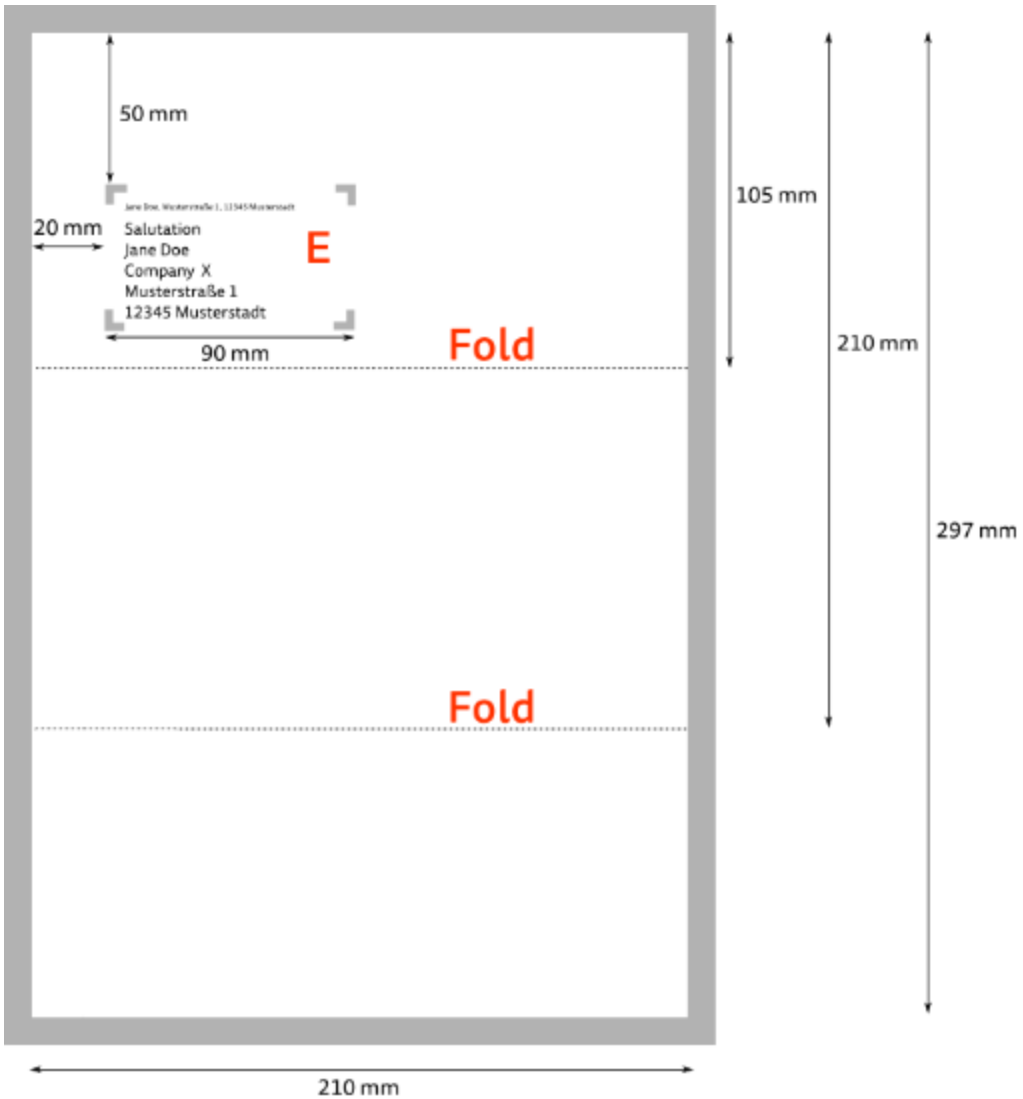
the following dimensions and limitations:

- E: This area contains the recipient's address, the sender's address and the electronic franking code (for automatic machine-readable postage calculation). The letter is inserted into a white envelope with window. The recipient area is visible through the envelope window. The distance from the top edge is 50 mm and 20 mm from the left. The areas around the recipient area can be filled with any text and graphics. These areas are not visible once the letter is in the envelope and ready for postage.



The envelopes used for dispatch have dimensions of 144 x 229 mm with a paper quality of 75 gsm. The address window measures 45 x 90 mm. The position of the window is 20 mm from the left and 15 mm from the bottom.

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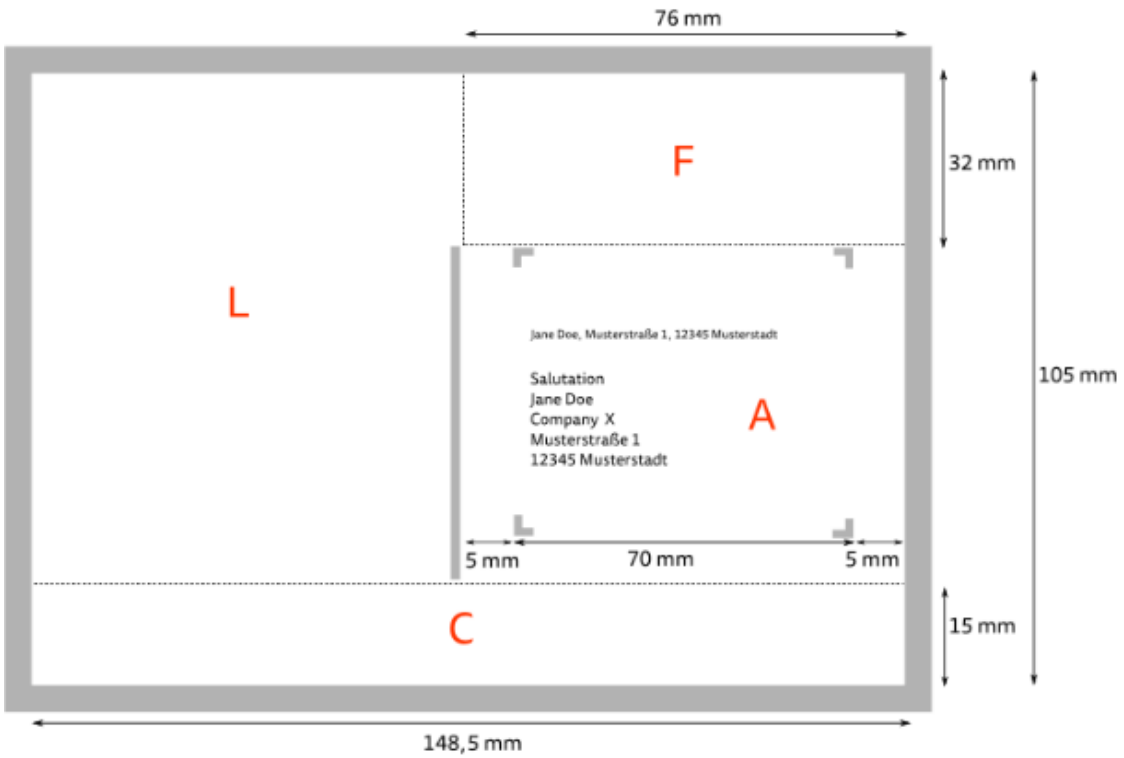
Postcard DIN A6

The postcard DIN A6 is printed on white paper (300 gsm, matt profi silk) using four-color laser printing. Borderless print (background graphics) is possible. The front side of a postcard has the following dimensions and limitations:

- F: Since automatic franking is done in the recipient zone, the franking area can remain empty or optionally contain a graphic or background color. Graphics in this area may not contain any alphanumeric characters or codes (e.g. QR codes). No text is permitted in the franking area. You can optionally place a franking wave here (also with your own design).
- C: The coding area may not contain any text, graphics or background colors.
- L: The reading area may contain both text and graphics without any restrictions. Borderless graphics require a 2 mm overflow.
- A: The address area contains the recipient's address, the sender's address and the electronic franking code (for automatic machine-readable postage calculation). The width of the address area is 70 mm. A distance of 5 mm must be kept from the right edge and the separator line.



Postcard DIN lang

The postcard DIN lang is printed on white paper (300 gsm, matt profi silk) using four-color laser printing. The front side of a postcard has the following dimensions and limitations:

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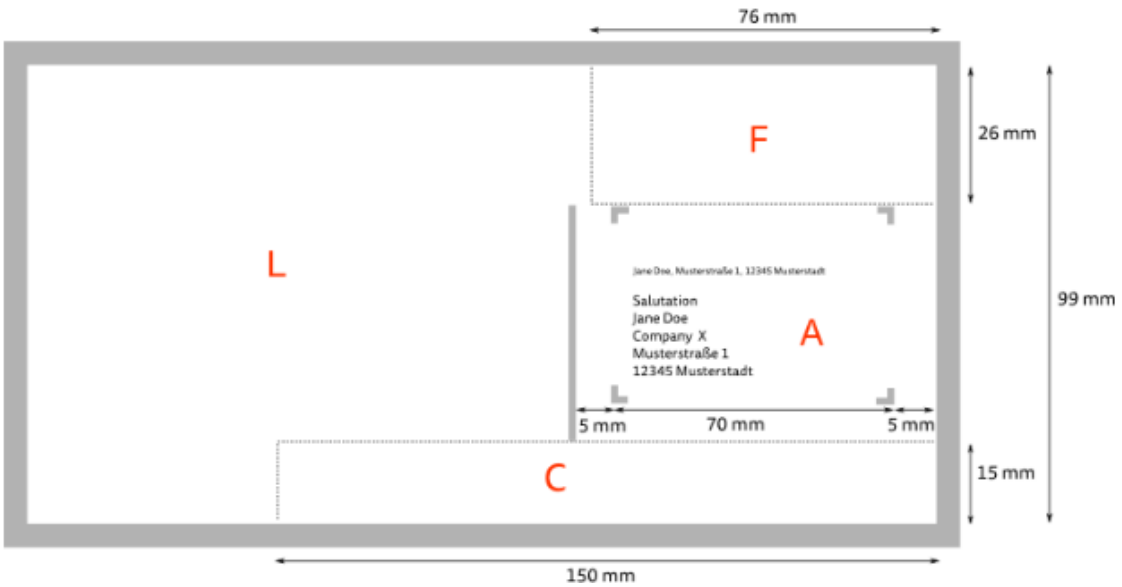
- F: Since automatic franking is done in the recipient zone, the franking area can remain empty or optionally contain a graphic or background color. Graphics in this area may not contain any alphanumeric characters or codes (e.g. QR codes). No text is permitted in the franking area. You can optionally place a franking wave here (also with your own design).
- C: The coding area may not contain any text, graphics or background colors.
- L: The reading area may contain both text and graphics without any restrictions. Borderless graphics require a 2 mm overflow.
- A: The address area contains the recipient's address, the sender's address and the electronic franking code (for automatic machine-readable postage calculation). The width of the address area is 70 mm. A distance of 5 mm must be kept from the right edge and the separator line.



Franking wave (postcards only)

You have the option of placing a franking wave in the franking area (F) on postcards. The franking wave can be combined with the automated franking in the address area (A). In addition to the franking wave and the mandatory information, you can also provide a custom motif (e.g. an image). The minimum distance for the franking (wave and image) from the top and right edges is 3 mm.

Only image files provided by Deutsche Post DHL Group may be used as print templates for the franking wave.

Cut tolerance (postcards only)

The cut tolerance for postcards is approximately 1.5 mm. To avoid cutting out text or images, set safe margins for your text and images.

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Edit print message content

- Read the Information about print messages chapter first and follow the instructions and limitations.
- At present it is only possible to send Print message to recipients in Germany.

The editor lets you add content to a print mailing or edit existing content. You can also initiate a test sending or test print from the editor. You can carry out the desired action by clicking on the corresponding button.

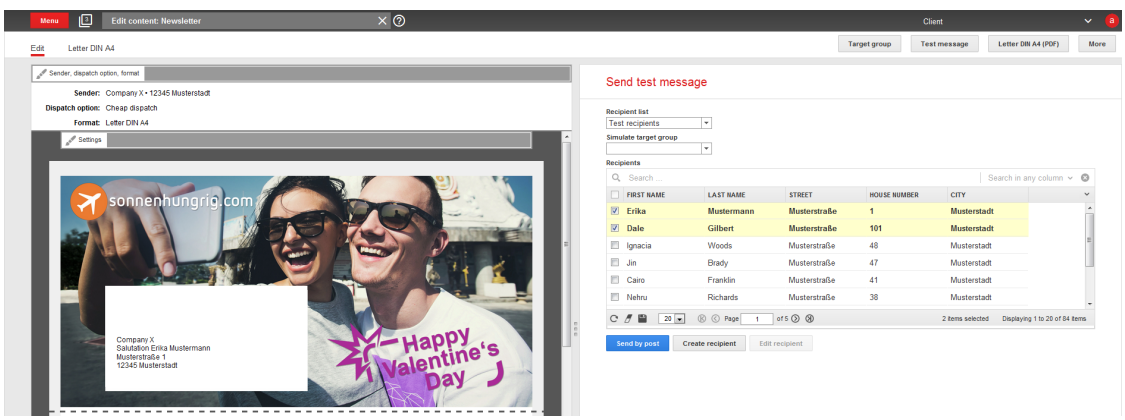
Test print

→ To create a PDF which you can print for test purposes, click `Letter DIN A4 (PDF)`, `Postcard DIN A6 (PDF)` or `Postcard DIN lang (PDF)`.

Color reproduction on your print depends on the printer used, the type of paper and the print settings. Most office printers are also unable to print borderless documents. If, for example, you want to do a test print of a postcard with an all-over background image, you will usually see a margin around the edges, and the size of the print is scaled down to fit this margin.

Such a test print is not suitable for judging the color reproduction and feel of the finished print. Borderless printing of background graphics is not possible using conventional printers.

Test message



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To test the entire dispatch process, send a test message. Test messages are always sent using **cheap dispatch**, you will generally receive the test letter within two working days. To start a test dispatch, perform the following steps:

1. In the top toolbar in the editor, click Test message.
2. In the **Recipient list** drop-down list, select a test list.
3. In the **Recipients** drop-down list, select one or more recipients. If you would like to create a new test recipient, click Create recipient and enter all the necessary recipient data. Then click Apply.
4. To trigger the test send, click Send by post.

Settings

To adjust print and layout settings as well as font settings for the print message, click the Settings button. The settings are described in the subsequent sections according to the tabs on the interface.

- General
- Font settings
- Background images

General

In the settings, switch to the **General** tab to specify the following settings:

Parameter	Description
Print settings...	These settings are available for the **letter** format and not for postcards
Print mode	Only the front side of a sheet of paper will be printed. Page numbering counts only the front side of each page, i.e. each sheet of paper is one page. This mode allows you to print up to three pages per letter. Double-sided printing will print on both sides of the sheet. Page numbering counts both front and back sides of the page as individual pages, i.e. one sheet equals two pages. This mode allows you to print up to six pages per letter.
Number of pages	Select the desired number of pages (maximum six). Note the limitations applied to each letter by the print mode selected above.
Layout...	

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Parameter	Description
Space between texts and images	This distance creates an optical separation of blocks of text and images and is important for ensuring good readability of the printed letter. This is set to a default distance of 0.5 cm. If you would like a larger distance, enter the value here, up to a maximum of 5.0 cm. We do not recommend using a value lower than 0.5 cm.
Inherit...	These settings are available for the **letter** format and not for postcards
Header	Specify here whether or not the content of the header and footer on the first page should be carried over to the following pages. If inheritance is disabled, you can specify alternate content for the headers and footers of the following pages or leave them blank.
Footer	

Font settings

In the settings, switch to the **Font settings** tab to specify the fonts used:

Parameter	Description
Headings...	
Font type	You can enter multiple fonts separated by commas. If a font is not available, the next font listed is used. Always provide a generic font type, such as serif or sans-serif as a fallback.
Color	Font colors for print mailings must always be entered as CMYK color values, e.g. `cmyk(100%,0%,0%,0%)`.
Size	Font sizes for print mailings must always be entered as point sizes (pt).
Line height	If you specify a fixed line height, then this must be larger than the font size. The lines of text will otherwise overlap.
Underline	Select the check box to make headings appear underlined.
Bold	Select the check box to make headings appear in bold.
Text...	
Font type	You can enter multiple fonts separated by commas. If a font is not available, the next font listed is used. Always provide a generic font type, such as serif or sans-serif as a fallback.
Color	Font colors for print mailings must always be entered as CMYK color values, e.g. `cmyk(100%,0%,0%,0%)`.

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Parameter	Description
Size	Font sizes for print mailings must always be entered as point sizes (pt).
Line height	The line height must be larger than the font size, otherwise lines of text will overlap.

Additional fonts

If you would like to use additional fonts in your print mailings, then these can be placed in the CMS for your client. To do this, we need the desired font along with the desired variations (e.g. bold, italic, ...) as a True Type Font (TTF). For more information, contact customer support.

Background images

In the settings, switch to the **Background images** tab to define a background image for individual pages of a letter or the front and back sides of a postcard. Background images are printed borderless (provided the uploaded image has the right dimensions). Background images require an overflow of 2 mm. Background images are aligned to the top left edge. If you use an image that is smaller than the paper size, then there will be a white margin on the right and/or bottom edges. For technical reasons, borderless printing requires images to be created with a 2 mm overflow. This means that a borderless image for printing on a Postcard DIN A6 (148.5 mm x 105 mm) requires a graphic with the dimensions 152.5 mm x 109 mm to be uploaded.

Parameter	Description
Page 1...6 / address page / back page	
Image	Upload the desired background image. Graphics require a minimum resolution of 150 dpi. However, for optimal print quality we recommend using 300 dpi. Borderless printing requires graphics with a 2 mm overflow.
Width	You can specify the width of the image in cm. By default, this is determined from the number of pixels and the standard resolution of 300 dpi. If you want to keep the original size, then leave this blank. If you specify a greater width than the original, the resolution will be

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Parameter	Description
	reduced accordingly. This will also lead to reduced print quality. If you want to increase the width of the image, then the resolution will be recalculated. The print quality remains the same in this case. The minimum resolution is 150 dpi. If you specify a width that, after processing, produces a resolution less than this, then the maximum possible width at 150 dpi will be used. The image cannot be made any larger.

Letterhead

The top edge of the letter or postcard can be printed with a letterhead. The letterhead can contain, for example, your company logo or a call to action. The size of the letterhead is limited, as the address area is below it. Place one or more content paragraphs in the letterhead area and insert the desired content (graphics or text).

Address area

The address area contains the sender and the recipient in machine-readable form. The size and position of this paragraph is fixed. This applies for both postcards and letters. For the latter, the address needs to be visible in the window of the envelope. You can perform the following settings for the address area:

Parameter	Description
Layout...	
Position of extra address line	Additional address information can be e.g. the name of the company or additional delivery instructions in the form of a c/o. If the mailing is primarily addressed to a business, select the option `Additional address information on the first line`. If the mailing is primarily addressed to an individual, then select the option `Additional address information on the third line`.
Position of salutation	Select the desired position for the salutation on the address area.

Content area

The content area has content paragraphs available. To add a new content paragraph, click `New: Content paragraph` and select the desired type:

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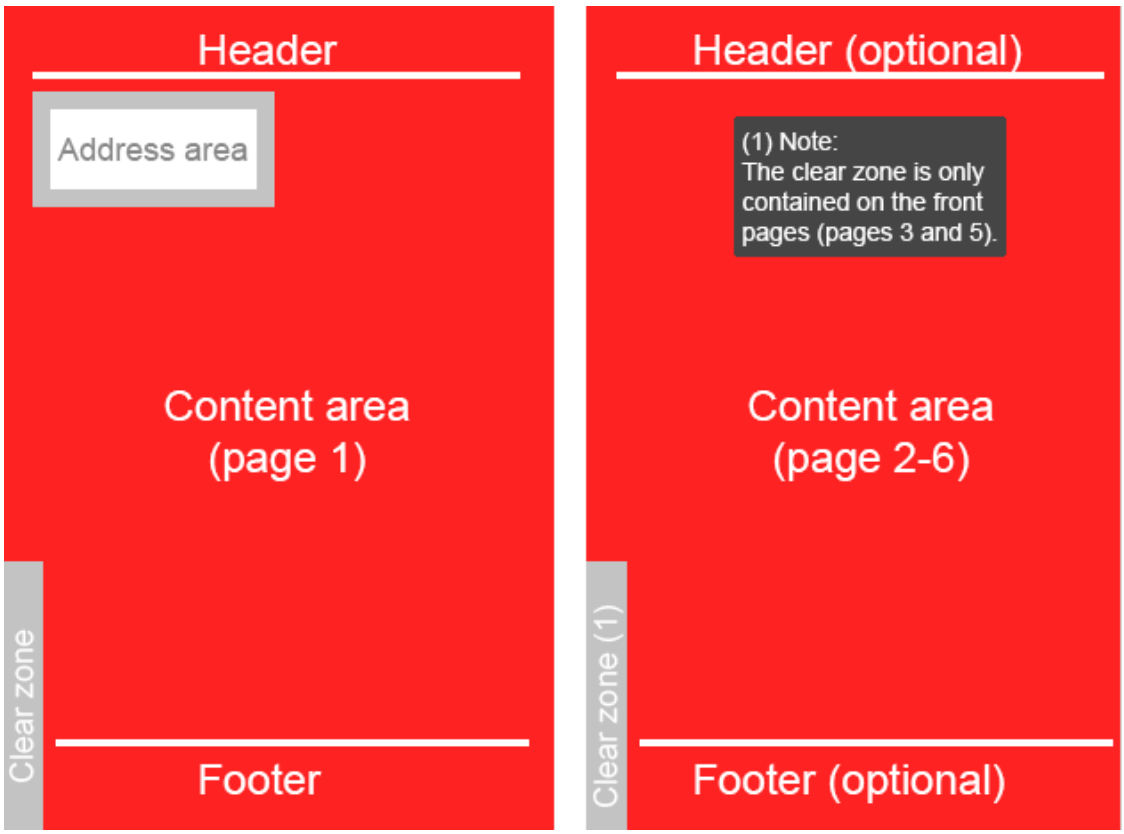
- Text or image paragraph
- Image bar paragraph

For the content area, additional pages or front and back sides are available depending on the format chosen for the mailing (Postcard DIN A6, Postcard DIN lang or Letter DIN A4). The following diagram shows the content areas for the different formats:

Letter DIN A4



Postcard DIN A6

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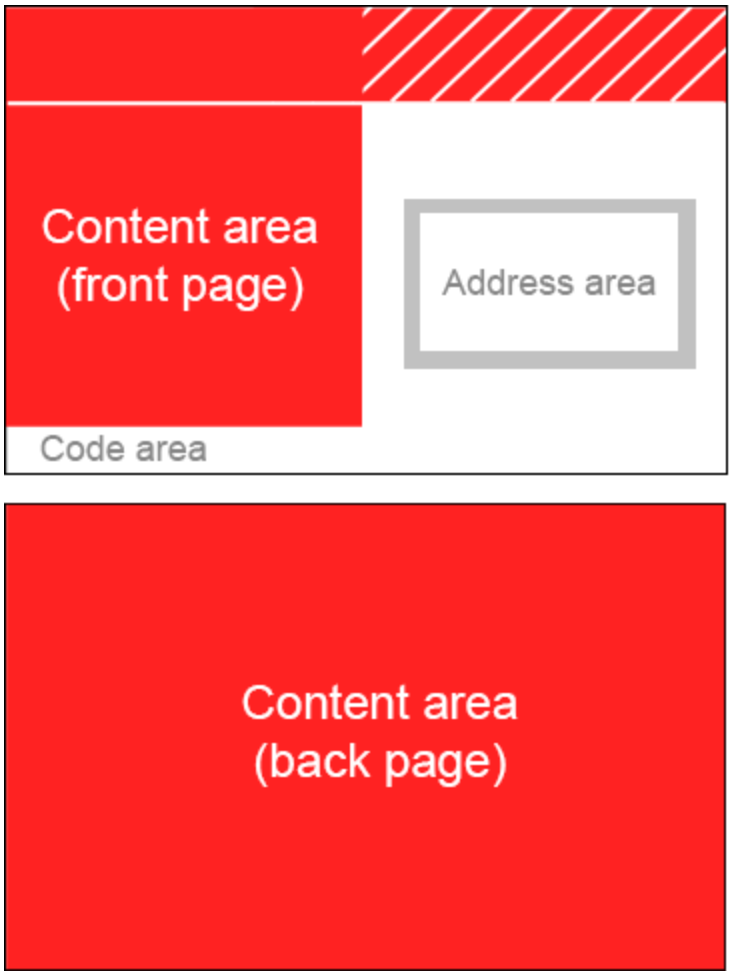

Postcard DIN lang

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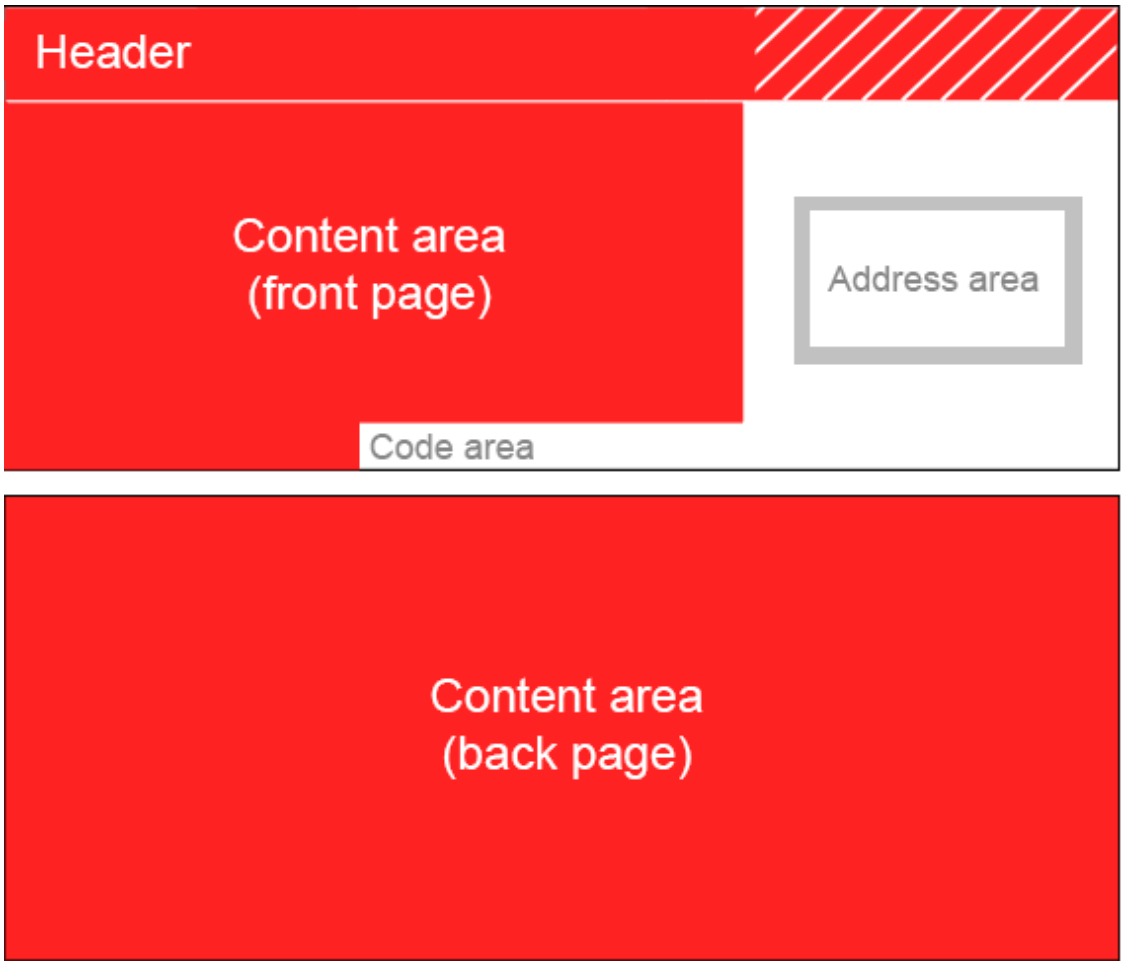

Footer area

Place information such as contact details, bank account number or company logos in the footer area. The footer has a fixed height and runs across the whole available width of the mailing. Place one or more content paragraphs and insert the desired content (graphics or text).

Text or image paragraph (Print)

This paragraph contains a text block and an image. The elements can be freely positioned.

- General
- Images
- Options
- Target groups

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General

Parameter	Description/Type
Content...	
Heading	Enter a heading for the paragraph.
Text	Enter the desired text here. You can divide the text into paragraphs and lists or use any other dividing element or text markup. Select the desired format from the menu in the editor.

Images

Parameter	Description/Type
Image 1...3	
Image	Upload an image from your computer or in the **Alternative external URL** box, enter an image URL that refers to the image source. To get a sufficiently high resolution when printing, images must have a resolution of at least 150 dpi, ideally 300 dpi. The JPG and TIFF file formats in both RGB and CMYK color spaces can be used. Images using the RGB color space will be automatically converted to CMYK for the print template. Images using CMYK are converted to RGB for displaying on screen in the editor and the preview. Color variations may occur. You should, therefore, always check the print mailing by doing a test print.
Width	By default, the image is scaled to a resolution of 300 dpi. The image width in cm can be altered here, provided that the associated dpi value is not below the threshold value of 150 dpi. If the space available is smaller than the image, the image will be cropped.

Options

Parameter	Description/Type
Layout...	
Width	The maximum available width is used as default. This conforms to the padding and is

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Parameter	Description/Type
	dependent on the chosen format and position: » **Letter DIN A4**: 9.75 cm next to the address field; 19.55 cm in the header and footer areas and below the address area. » **Postcard DIN A6**: 6.8 cm next to the address field, 13 cm on the back. » **Postcard DIN lang**: 12 cm next to the address field, 19.55 cm on the back.
Margin	You can specify different margins for each page. Entering a value of 0 means that no margin is used. All values are in centimeters (cm). The information is structured as follows: » A single value, e.g. `1.0` sets the external spacing to the same value on all sides. » Two values, e.g. `1.0 0.5` sets the external spacing to 1.0 cm at the top and bottom, and 0.5 cm on the left and right. » Four values, e.g. `2.0 1.0 0.5 1.0` sets the external spacing to 2.0 cm at the top, to 1.0 cm on the right, 0.5 cm on the bottom, and to 1.0 cm on the left.
Padding	You can specify a different internal spacing for each page. Entering a value of 0 means that no internal spacing is used. All values are in centimeters (cm). The information is structured as follows: » A single value, e.g. `1.0` sets the internal spacing to the same value on all sides. » Two values, e.g. `1.0 0.5` sets the internal spacing to 1 cm at the top and bottom, and 0.5 cm on the left and right. » Four values, e.g. `2.0 1.0 0.5 1.0` sets the internal spacing to 2.0 cm at the top, to 1.0 cm on the right, 0.5 cm on the bottom, and to 1.0 cm on the left.
Border width	The border width is also specified in centimeters (cm). Enter the value `0.1` for a 1 mm border.
Border color	The border color is specified using a CMYK value and consists of four parameters (one parameter for each color channel), e.g. `cmyk(100%,0%,0%,0%)`.
Border style	In the drop-down list, select a border style.
Space between heading and text	Define the distance in centimeters (cm) between the heading and the first text/image block here.
Space	Define the distance in centimeters (cm) between individual images here. This value

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Parameter	Description/Type
between images	only matters if you insert more than one image into a paragraph.
Image position	Select your desired positioning for images.

Target groups

Parameter	Description/Type
Target groups	If you only want the paragraph to be displayed to a specific recipient segment, select the desired target group here. Test target groups and target group combinations to ensure that all variations of the mailing display correctly in the print format and that no content has been cut off.

Image bar (Print)

This section creates a horizontal or vertical image bar across the entire available width. You can specify up to ten images. The images are automatically scaled. The more images you specify, the smaller each individual image will be.

General

Parameter	Default	Description
Image 1...10		
Image		Upload an image from your computer or enter an image URL in the **Alternative external URL** field that refers to the image source. To get a sufficiently high resolution when printing, images must have a resolution of at least 150 dpi, ideally 300 dpi. The GIF, PNG, JPG and TIFF file formats in both RGB and CMYK color spaces can be used. We recommend using exclusively the JPG and TIFF formats to achieve the best print results. Images using the RGB color space will be automatically

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Parameter	Default	Description
		converted to CMYK for the print template. Images using CMYK are converted to RGB for displaying on screen in the editor and the preview. Color variations may occur. You should, therefore, always check the print mailing by doing a test print.
Width		By default, the image is scaled to a resolution of 300 dpi. The image width in cm can be altered here, provided that the associated dpi value is not below the threshold value of 150 dpi. If the available width is smaller than the image, then the image will be cropped.

Options

Parameter	Description
Visual appearance...	
Width	The maximum available width is used as default. This conforms to the interior spacing and is dependent on the chosen format and position: » **Letter DIN A4**: 9.75 cm next to the address field; 19.55 cm in the header and footer areas and below the address area. » **Postcard DIN A6**: 6.8 cm next to the address field, 13 cm on the back. » **Postcard DIN lang**: 12 cm next to the address field, 19.55 cm on the back.
Margin	You can specify different external spacing for each page. Entering a value of 0 means that no external spacing is used. All values are in centimeters (cm). The information is structured as follows: » A single value, e.g. `1.0` sets the external spacing to the same value on all sides. » Two values, e.g. `1.0 0.5` sets the external spacing to 1.0 cm at the top and bottom, and 0.5 cm on the left and right. » Four values, e.g. `2.0 1.0 0.5 1.0` sets the external spacing to 2.0 cm at the top, to 1.0 cm on the right, 0.5 cm on the bottom, and to 1.0 cm on the left.
Space between images	Define the distance in centimeters (cm) between individual images here. This value only matters if you insert more than one image into a paragraph.

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Parameter	Description
Arrangement	The image strip is horizontal by default. Select the option `below one another` for a vertical image strip.
Alignment	In the drop-down list, select the desired position for the image strip. This option only has an effect when the image strip does not fill the entire available width.

Target groups

Parameter	Description
Target groups	If you only want the paragraph to be displayed to a specific recipient segment, select the desired target group here. Test target groups and target group combinations to ensure that all variations of the mailing display correctly in the print format and that no content has been cut off.

View the DPAG order reference

The DPAG order reference is the order number assigned to your sent print messages by Deutsche Post. You can view the DPAG order reference in Episerver Campaign and obtain the following information:

- the date and time that your print message was sent by post
- the number of sent print messages that are assigned to the order reference
- the format of the sent print messages (for example DIN A4)
- the dispatch type (expedited or standard delivery)
- the print mode of the sent print messages (single or double-sided)

To view the DPAG order reference for your print messages, perform the following steps:

→ 1. Open the start menu and in the **Campaigns** menu click **Smart Campaigns**.

✔ All campaigns will be displayed in the list in the top half of the window.

→ 2. In the campaign overview, select the print campaign for which you wish to obtain the DPAG order reference.

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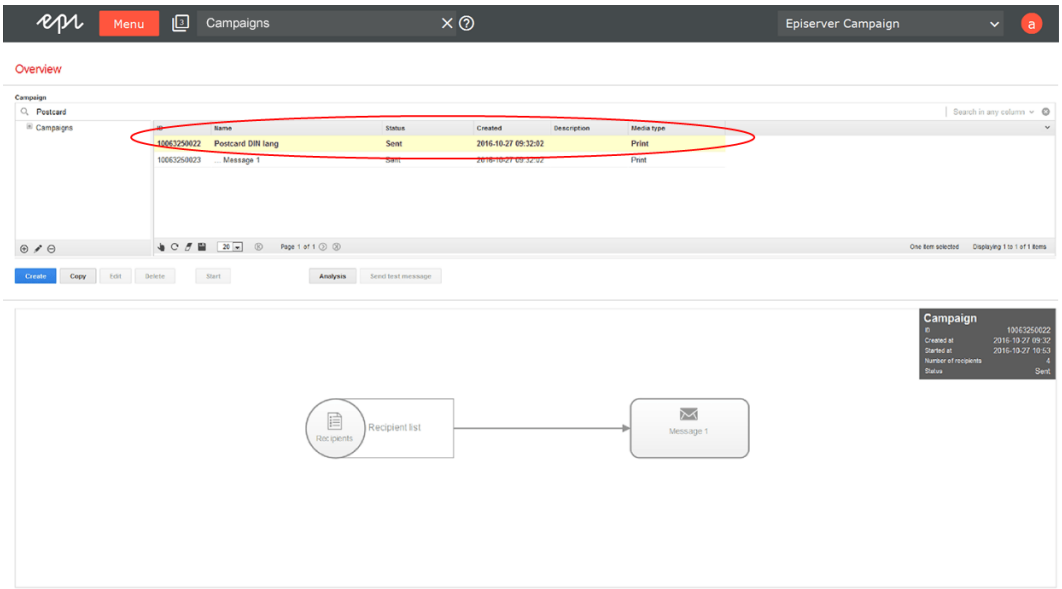
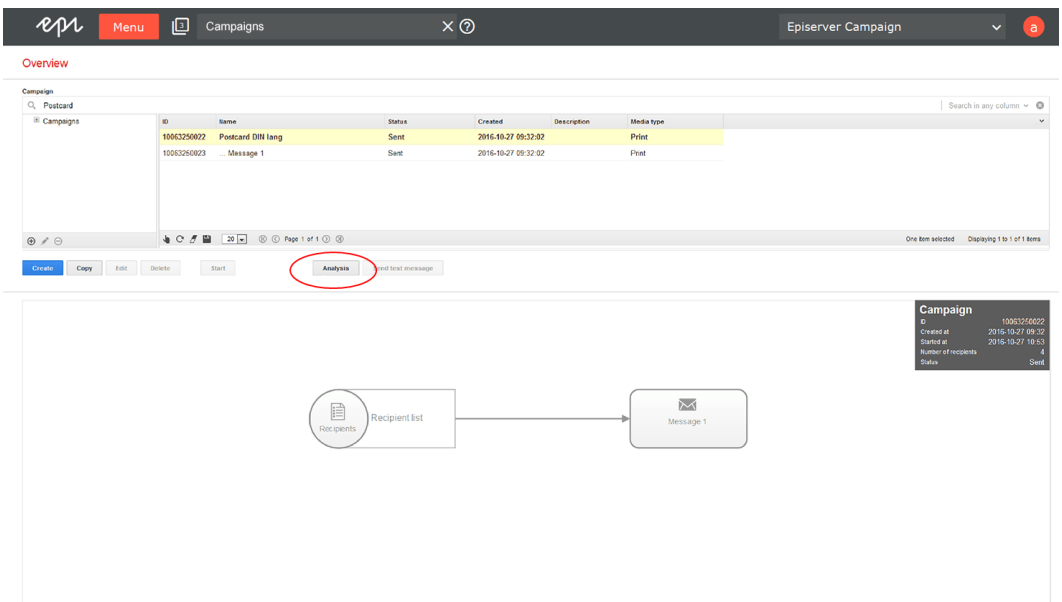


You can view the DPAG order reference for both Smart Campaign print messages and transactional emails of the media type **Print**.

3. Click Analysis .



The **Campaign Analysis** window opens.

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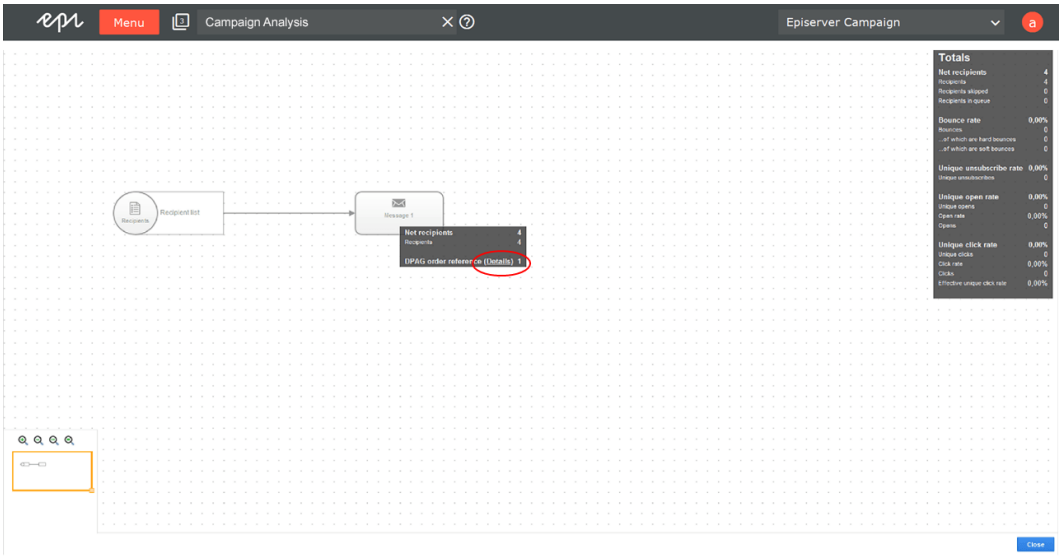
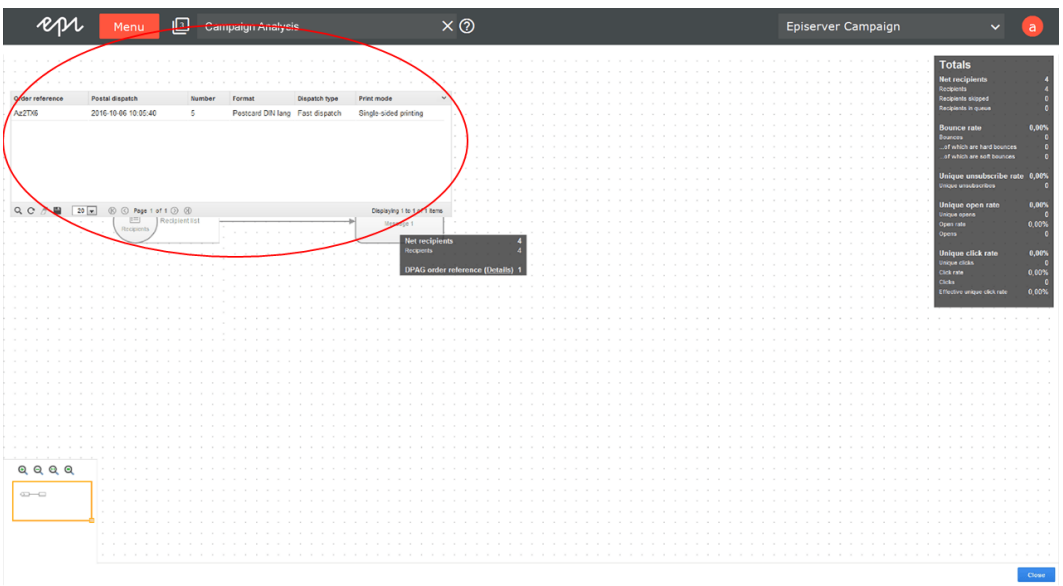
➔ 4. Click **Details** in the message node under **DPAG order reference**.



✔ An information box opens.

➔ 5. The information box shows the DPAG order reference, the postal delivery method, the number of sent print messages, the format, the distribution method and the print mode.



The information may contain several DPAG order numbers, as one print message may be assigned several DPAG order numbers. This may be the case, for example, if you

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resend the message and Deutsche Post AG assigns a new order number for the second delivery. The number of related order numbers is shown in the message node under **DPAG order reference**.

Episerver Mobile Push

You can reach your customers quickly on mobile devices and draw attention specifically to your advertising messages or store articles. With Episerver Mobile Push, you control the delivery of app-based push messages via Episerver Campaign effectively, automated and built into your campaigns.

Your key advantages

- Automated delivery of app-based push messages via Episerver Campaign
- Campaign management via Smart Campaigns and Marketing Automation
- You can individually customize your push messages before sending them, for example, by setting time limits and fields for individual target links when opening
- Integrated preview function for your push messages

Requirements

To use Episerver Mobile Push, you will require an app that you created and manage as well as a user account for Firebase Cloud Messaging Service (FCM).

Supported operating systems

Android	Version 4.1 and higher
iOS	Version 8.0 and higher

What we need from you to set up Episerver Mobile Push

For customer support to set up Episerver Mobile Push, we require the following information from you:

- the name of your Episerver Campaign client
- your app's icon in a PNG file format (512x512 pixels and not greater than 1 MB)
- the app ID/package name of the app into which the SDK needs to be integrated
- your FCM account's API key
- the sender ID with which the app registers at FCM
- the name of your app
- the desired recipient list fields (see also Recipient list) - Complete the form you received from customer support for setting up the client, then email it to developersupport@episerver.com

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What you receive from us for adapting your app

After successful configuration of your client, customer support will contact you and provide the following information:

- the SDK for Android (the ZIP file contains the executable JAR file)
- the SDK for iOS (the ZIP file contains the SDK source code)
- SDK documentation
- the Episerver Campaign authentication token that is generated for the app and required for the SDK

Notes

The following are additional notes on using and setting up Episerver Mobile Push.

Recipient list

Once a user has installed the app onto the device (the SDK is integrated into the app), FCM automatically generates a registration token when the SDK is initialized on the device. The registration token is a unique key used to identify the user in a recipient list [1] and is sent to Episerver Campaign. The app sends this user registration token together with information about the end device used:

[1] A maximum of one recipient list per app is permitted in Episerver Campaign.

- Language used
- Operating system platform
- Operating system version
- Operating system SDK
- App version
- App SDK
- Device manufacturer
- Device model
- Device brand
- Product
- Timezone

The app can also transfer additional client data, such as user email address (if the user is registered in the APP).

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Email addresses that are transferred with customer data are **not** a valid opt-in for your email marketing. However, you may still use these email addresses for reconciliation with other recipient lists.

Opt-in

Android

No mandatory opt-in method currently exists for end devices running Android. App developers are free to offer a setting for receiving messages when installing the push messages app.

iOS

iOS requires users to consent to receiving messages.

Opt-out

Android and iOS

If the user disables push notifications in the app settings or deletes the app, he/she will no longer receive any push notifications.

Effects on recipient lists

If the user disables push notifications or deletes the app, the user is not entered in the blacklist. However, the user will be deleted from the list at the next dispatch attempt if:

- the push token is the recipient ID.
- the push media field is the only media field in the recipient list.
- the push media field is **required**.

The user is not deleted from mixed recipient lists with several media type fields. Only the push token data is removed from the push media field at the next sending trial.

SDK and documentation for Android

Prepare your Android app for receiving push messages via Episerver Campaign. With the Software Developer Kit (SDK) you will receive all required code components for integration into your app. The technical documentation provides instructions on how to do this.

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System requirements

Android	Version 4.1 or higher
Android API	Level 16 or higher
Google Play Store	Version 7.5 or higher

Registration with Firebase Cloud Messaging

1. Open https://console.firebase.google.com/ and log in using your Google account.
2. Click **Add project** and create a new project for the app.

✔ The project overview page opens.

3. Click **Settings** ⚙ and then **Project settings**.

✔ The project settings open.

4. Switch to the **Cloud Messaging** tab and note the **Legacy server key** and sender ID for passing to Episerver Campaign.
5. Click **Settings** ⚙ and then **Users and permissions**.

✔ A new window with your project permissions opens.

6. In the navigation on the left-hand side, click **Service accounts**.
7. At the top of the navigation, click **+ CREATE SERVICE ACCOUNT**.
8. Enter the name of the service account and provide an optional service account ID.
9. Select the **Furnish a new private key** check box and activate the **JSON** option.
10. Click **Create** and save the generated JSON file.

✔ The new service account is now shown in the overview along with the key ID.

SDK documentation

Download the SDK documentation here: SDK documentation for Android (zip file)

Download the SDK

You can download the SDK here: SDK for Android (executable JAR file in a zip file)

Integration

To integrate the SDK into your app, perform the following steps:

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1. Include the SDK-JAR and Google Play Service.

   If you use the Gradle build system, enter the following dependency into the **build.gradle** file:

```
dependencies {
compile 'com.google.android.gms:play-services:7.5.+'
compile 'com.google.android.gms:play-services-gcm:7.3.0'
}
```

2. Add your message notification logo as Drawable with the name **bm_default_notification_icon**.

   - Always create an icon, as otherwise incoming messages are quietly swallowed up.
   - From Android 5.0 onwards, the icon must be white. See also https://www.google.com/design/spec/style/icons.html.

3. Create a class which inherits from **de.optivo.sdk.PushNotificationClickedReceiver** and overrides the **handleClick** method (Context, OPMessage). This method is triggered when a message is clicked. The data transferred via the push message are also available in the **OPMessage** object.

   Tracking clicks

   Optionally, you can call the method **de.optivo.sdk.OptivoSDK.trackOpen** (Context, OPMessage) from within the **handleClick** method to track clicks on messages.

4. Register the class that inherits from **PushNotificationClickedReceiver** in the AndroidManifest as follows and change the class names accordingly:

```
<receiver
        android:name=".DemoPushNotificationClickedReceiver"
          android:enabled="true"
          android:exported="true" >
          <intent-filter>
              <action android:name="de.optivo.sdk.push.GCM_
NOTIFICATION_CLICKED" />
          </intent-filter>
</receiver>
```

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5. Register the following receiver and services in AndroidManifest:

```
<service
     android:name="de.optivo.sdk.RestApiService"
     android:exported="false" >
</service>
```

```
<receiver
     android:name="com.google.android.gms.gcm.GcmReceiver"
     android:exported="true"

android:permission="com.google.android.c2dm.permission.SEND" >
     <intent-filter>
     <action
android:name="com.google.android.c2dm.intent.RECEIVE" />
     </intent-filter>
</receiver>
```

This listener will ensure correct delivery of the FCM messages and must be declared. It is only started if the app is in the foreground. Then the **OptivoGcmListenerService** discards the incoming push message and displays no message. If the app is in the background, the push notifications are managed by the system, and a notification is automatically displayed in the notification bar of the device. To change the behavior for incoming push messages, implement your own solution.

```
<service
     android:name="de.optivo.sdk.OptivoGcmListenerService"
     android:exported="false" >
     <intent-filter>
          <action
android:name="com.google.android.c2dm.intent.RECEIVE" />
     </intent-filter>
</service>
```

```
<activity

android:name="de.optivo.sdk.PushNotificationClickedActivity"
      android:enabled="true"
      android:exported="true" >
      <intent-filter>
          <action android:name="YOUR.PACKAGE.intent.action.PUSH_
NOTIFICATION" />
          <category
```

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```
android:name="android.intent.category.DEFAULT" />
      </intent-filter>
</activity>
```

-
```
<service
     android:name="de.optivo.sdk.InstanceIDListenerService"
     android:exported="false" >
     <intent-filter>
          <action
android:name="com.google.android.gms.iid.InstanceID" />
     </intent-filter>
</service>
```

-
```
<service
     android:name="de.optivo.sdk.TrackingUrlService"
     android:exported="false" >
</service>
```

6. When starting the application, or when the user logs in or goes online, the SDK must be initialized as follows to receive messages:
   - Initialization of the framework:

```
OptivoSDK.init(
        getApplicationContext(),            // App-Context
        "1234567890",                       // GCM Sender ID
        "de.optivo.pushdemo",               // Package name,
your package name here
        "xxx",                              // Auth-Token, your
auth-token here
        Collection<String> paramNames);     // List of valid
parameters
```

   - Alternatively, for recipient lists with a recipient ID field which is not the standard GCM recipient token:

```
OptivoSDK.initWithRecipientId(
        getApplicationContext(),          // App-Context
        "1234567890",                     // GCM Sender ID
        "de.optivo.pushdemo",             // Package name, your
package name
        "xxx",                            // Auth-Token, your
auth-token
        Collection<String> paramNames,    // list of valid
```

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```
parameter names
        "myIdFieldName",                    // Name of the ID
field in the recipient list
        recipientId);                       // ID of the app user
```

SDK and documentation for iOS

Episerver Mobile Push: SDK and documentation for iOS

Prepare your iOS app for receiving push messages via Episerver Campaign. With the Software Developer Kit (SDK), you receive all required code components for integration into your app. The technical documentation provides you with instructions.

System requirements

iOS	Version 8.0 or higher

Registration with Firebase Cloud Messaging

→ 1. Open https://console.firebase.google.com/ and log in using your Google account.

→ 2. Click **Add project** and create a new project for the app.

✔ The project overview page opens.

→ 3. Click **Settings** ⚙ and then **Project settings**.

✔ The project settings open.

→ 4. Switch to the **Cloud Messaging** tab and note the **Legacy server key** and sender ID for passing to Episerver Campaign.

→ 5. Click **Settings** ⚙ then **Users and permissions**.

✔ A new window with your project permissions opens.

→ 6. In the navigation on the left-hand side, click **Service accounts**.

→ 7. At the top of the navigation, click **+ CREATE SERVICE ACCOUNT**.

→ 8. Enter the name of the service account and provide an optional service account ID.

→ 9. Select the **Furnish a new private key** check box and activate the **JSON** option.

→ 10. Click **Create** and save the generated JSON file.

✔ The new service account is shown in the overview along with the key ID.

SDK documentation

Download the SDK documentation here: SDK documentation for iOS (zip file)

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Download the SDK

You can download the SDK here: SDK for iOS (ZIP file, contains the source code of the SDK)

Integration

To integrate the SDK into your app, perform the following steps:

1. Log in to FCM with your Google Developer account.
2. Download the **GoogleService-Info.plist** with the configuration for FCM from https://firebase.google.com/cdocs/ios/setup.
3. Add the iOS source code including all dependencies (see Installation).
4. In **-application:didFinishLaunchingWithOptions:**, create an instance of **OPPushClient** with the package name and authorization token which you received from customer support.
5. Call up all required **-application*** methods, which are specified in **OPPushClient.h header** by your app delegate.

Additional functions

Use **userinfo** in the app delegate **-application:didReceiveRemoteNotification*** methods to process incoming messages.

Installation

1. In your Podfile, enter the following extension, according to the cocoapods.org rules:

```
pod 'Google/CloudMessaging', '~> 1.1.0'
```

2. Add the iOS source code to your project.

Episerver SMS

Mobile marketing offers enormous potential for reaching new target groups. With Episerver SMS, you can quite prominently reach your customers on their mobile devices. In most countries in which this is possible, Episerver SMS uses direct routes to the network operators, and therefore offers exceptional quality, speed, and availability. Thus Episerver SMS is suited to the delivery of transactional and commercial messages. Send your appointments, PINs, billing, delivery or order information directly to your customer's SMS inbox, e.g. the latest personal and customized special offers. For interactive direct communication with your customers, use it to receive incoming SMS in the form of Episerver SMS. Our portfolio includes the generation of short codes and standard numbers for your two-way mobile customer communications.

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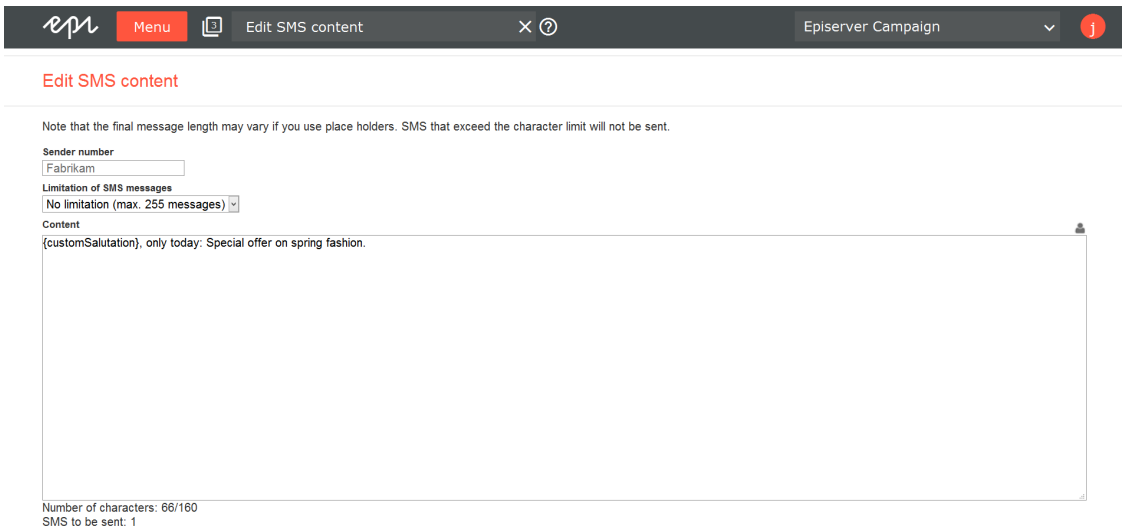
A personalized message is possible at all times. For effective international SMS communication, all relative character sets and data formats are supported, which allows you to use country-specific characters without problems.

A special opt-in is necessary to send SMS messages to your recipients.

Text length and number of characters



SMS messages are pure text messages. The maximum number of characters per message depends on the coding and the special characters used. Modern mobile phones can receive SMS which are too long (so-called concatenated SMS) with no problem, and display these as a single message. More information on these topics can be found in the following sections.

The GSM standard was developed for the sending and receiving of SMS via the cellular mobile network. This contains a simple character set for the sending of SMS, the so-called GSM 7-Bit default alphabet. With this character set, up to 160 characters can be sent in an SMS. The following characters are available for use:

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

In addition to the visible characters shown above, the following non-visible characters are available:

- spaces
- new-line

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- carriage return

The GSM standard, meanwhile, contains an extension of the standard character set. With these, you can use an additional nine characters. Each character from the standard character set extension requires **two characters**:

^ [ ] { } \ | €~

Sending internationally

The sending of SMS via Episerver Campaign also supports the new character set UCS2. This character set covers most modern languages and is defined in the specification International Standard ISO/IEC 10646. For more information, see Universal Coded Character Set.

When UCS2 is used, an SMS can only contain 70 characters, as in this case each character requires 16-bit. this is more than double the storage space required by a character in the GSM 7-bit default alphabet.

Country-specific features

The sending of SMS is subject to country-specific regulations. These can vary widely, and not all features described here are available in each country and may be subject to country specific restrictions. This primarily includes the following functions:

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

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

SMS encoding

Whether an SMS is GSM-coded (7-bit) or UCS-coded (16-bit) depends on the characters used. The encoding is performed automatically. Each SMS can have only one encoding, that is, if an SMS uses one 16-bit encoded character, the entire message is 16-bit encoded, even if all other characters can be encoded using 7-bit encoding.

Notes

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

Multipart SMS (concatenated SMS)

It is possible to send a message which has more than 160 or 70 characters (depending on the character set). In this case, the text will be sent as multiple individual SMS messages and modern end devices can generally display these SMS messages as a single SMS for the user. The aforementioned procedure corresponds to the GSM protocol **Concatenated SMS**. For longer texts, several individual SMS messages are used and counted for billing purposes.

Unfortunately, the number of possible characters per SMS is reduced for concatenated SMS messages. Thus in this case only 153 or 67 characters (respectively) per SMS are available. The maximum lengths can be seen from the following table:

Number of SMS text messages	1	2	3	4	each additional
GSM 7-bit (default alphabet)	160	306	459	612	each plus 153 characters
UCS2	70	134	201	268	each plus 67 characters

Recommended maximum number of characters

Do not send more than 10 SMS (1,530 characters) for a **Concatenated SMS**. If you send more than 10 SMS, or 1,530 characters, it is not guaranteed that a multiple part message is sent or received correctly.

Field functions and placeholders in SMS

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If you use field functions and placeholders in an SMS message, the text length of the SMS sent cannot be calculated in advance. This way, SMS messages may become multi-part messages and incur higher costs, if the placeholder text is replaced by the personalized content (e.g. the name of the recipient). Thus you should check, before sending, how many characters are included in your datasets and how long an SMS can be. You can also read the example in the Personalizations section.

How to check your costs

When sending SMS mailings, additional costs are incurred for each SMS sent. Billing is always calculated per SMS; if you, for example, send a two-part SMS mailing, two text messages (SMS) will be billed per recipient. For a better overview regarding your costs, in Episerver Campaign, you can enter how many SMS messages – and thus the maximum number of characters – you may wish to send. If the text entered is too long for the selected setting (e.g. 160 characters (1 part)), an error message will be displayed. In this way you can see your costs even before sending.

Direct routing

With direct routing, SMS delivery is carried out via dedicated routing. This ensures high delivery success rates, reliability, and speed, as with direct routing, each SMS sent passes through fewer nodes. Standard SMS delivery via Episerver Campaign is carried out via direct routing in the following countries:

- Germany
- United Kingdom
- Poland
- Austria
- Switzerland
- Turkey
- Italy
- Spain
- Greece

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- Hungary
- Romania
- Bulgaria

Due to different legal requirements or market conditions, Episerver is unable to offer direct routing in every country. In certain countries, it is necessary to carry out routing via so-called mediators. In these cases, Episerver always offers the most optimal route for reliable delivery. If you have any questions, contact our customer support.

Holding time

Mobile phones can temporarily be unreachable, if they are for example switched off or are outside of a mobile network. To ensure the highest possible deliverability, SMS messages sent via Episerver Campaign are held for **48 hours**. If the mobile phone of the recipient is not reachable during this period, the SMS will not be delivered and will be shown as a bounce.

Individual network operators may have different or shorter holding times. In such cases, we are unfortunately unable to guarantee a holding time of 48 hours.

Sender identification

SMS is implemented based on the phone provider. In addition to telephone numbers, you can also use alphanumeric character strings as sender identification. A maximum of 11 characters is available for sender identification. With Episerver SMS, you can use the following sender identification formats:

- **Alphanumeric sender identification**: This is a string of characters which can be comprised of letters and numbers. The sender identification may not begin with a number. We also recommend avoiding the use of umlauts and special characters. Alphanumeric sender identifications can only be used to send SMS. It is not possible to receive SMS.
- **Exclusive short codes**: You probably know these from your mobile voice mailbox: These are short sequences of numbers, for example 23232. We can make an exclusive short code available to you for your direct two-way customer communication. A detailed description of the format of a short code for Germany is provided by the German Federal Telecommunication Network Agency (Bundesnetzagentur). Exclusive short codes can only be used within the country where they were assigned. International routing is not possible.
- **Non-exclusive short code**: This is a short code which is simultaneously used by multiple service providers. You may provide key words for response capability. In this case you only receive forwarded messages which contain the key word you have provided.

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- **Long code**: A long code is a customary mobile number which can be routed internationally. For example, +4915112345678. The advantages of a standard number lie in cost and international usability.

Personalizations

You can also insert placeholders for recipient list fields (e.g. "Hello {first name}!") or field functions (e.g. salutation logic) into SMS messages. Upon delivery, these will then also be replaced by the corresponding name (e.g. Hello Andrea!) or another salutation format (e.g. "Dear Mr. Miller"). The use of placeholders and field functions in the display of used/remaining characters gives no precise results, as the actual length of a message can only be determined after the placeholder or the field function has been replaced by the individual value. This only takes place directly after sending. As a result, it is possible that e.g. a message which is intended to be sent as a single SMS, is divided into two messages in the case of longer names. This also results in higher delivery charges.

Example

The following message contains a placeholder for the first name of the recipient and therefore has exactly 163 characters:

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

When sending, the placeholder is replaced with the recipient's name, and will look e.g. like this:

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

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

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

Bounces

The sending of SMS via Episerver Campaign makes it possible to analyse bounces from SMS recipients. A bounce is generated when:

- The mobile phone, during the holding time is switched off or unreachable.
- The mobile phone's inbox is full.
- The number is invalid or no longer in use.

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Blacklist

If you would like to send SMS mailings via your client, the client's blacklist is adjusted accordingly. You can block complete numbers or specific parts of numbers (e.g. area codes). We urgently recommend that you block expensive satellite phone numbers, since the cost for a message sent via satellite is substantially more expensive (more than 1 euro per SMS).

The numbers (areas) entered into the blacklist are valid for both SMS and fax messages.

Incoming SMS

Episerver Campaign enables the sending and receipt of SMS. An SMS is a message which is sent via the mobile cellular network to a user's mobile device. An individual SMS can contain up to 160 characters – also fewer according to the characters and character set used.

If **exclusive short codes or standard numbers** are used, the receipt of messages is supported. For this purpose, Episerver Campaign the following service features are implemented:

	AT	BE	BG	BR	CH	CZ	DE	ES	GB	HU	IT	NL	PL	RO	TH	TR
Preparation of all incoming messages Messages are made available on an hourly basis as a CSV file on SFTP servers.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Data enhancement of splits in the CSV file for incoming messages Previously transferred recipient data can be written in the CSV file.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

In the case of use of a **non-exclusive short code**, the receipt of messages with the following features is supported:

	AT	BE	BG	BR	CH	CZ	DE	ES	GB	HU	IT	NL	PL	RO	TH	TR
Entry of key words	✓	✘	✓	✓	✓	✓	✓	✓	✓	✘	✘	✓	✓	✘	✓	✘
Supply of all incoming messages with one of the given key words																

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	AT	BE	BG	BR	CH	CZ	DE	ES	GB	HU	IT	NL	PL	RO	TH	TR
Messages are made available on an hourly basis as a CSV file on SFTP servers.																
	✓	✘	✓	✓	✓	✓	✓	✓	✓	✘	✘	✓	✓	✘	✓	✘
Data enhancement of splits in the CSV file for incoming messages Previously transferred recipient data can be written in the CSV file.																
	✓	✘	✓	✓	✓	✓	✓	✓	✓	✘	✘	✓	✓	✘	✓	✘

Outgoing SMS

Episerver Campaign enables the sending and receipt of SMS. An SMS is a message which is sent via the mobile cellular network to a user's mobile device. An individual SMS can contain up to 160 characters – also fewer according to the characters and character set used.

Delivery of an SMS can be accomplished with the following features:

	AT	BE	BG	BR	CH	CZ	DE	ES	GB	HU	IT	NL	PL	RO	TH	TR
Delivery by means of an alphanumeric source identifier, a maximum of 11 characters from the ASCII character set An alphanumeric source identifier is the text which appears as a sender on end devices.																
	✓	✘	✘	✘	✓	✓ 1	✓	✓	✓	✘	✓ 1	✓	✓	✘	✓ 1	✓ 1
Simple delivery of text messages These may contain links, which are clickable on any end device. The delivery of binary messages (for example logos or ring tones) is not supported.																
	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Subscription models and fee-based offers Business models or technical processes which result in costs charged to the user (so-called premium models).																
	✘	✘	✘	✘	✘	✘	✘	✘	✘	✘	✘	✘	✘	✘	✘	✘
Delivery via an exclusive short code A short code can have four to six digits, depending on the country where it is assigned.																

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	AT	BE	BG	BR	CH	CZ	DE	ES	GB	HU	IT	NL	PL	RO	TH	TR
	✓	✓	✓	✓	✓	✓	✓ 2	✓	✓	✘	✘	✓	✓	✓	✓	✓
Delivery via a non-exclusive short code In this case, a short code is used by multiple service providers.																
	✓	✘	✓	✓	✓	✓	✓	✓	✓	✘	✘	✓	✓	✘	✓	✘
Delivery via an exclusive standard number A standard number is a customary mobile number which can be routed internationally.																
	✓	✓	✘	✘	✓	✓	✓	✘	✓	✓	✓	✓	✓	✓	✘	✘
Message coding is with the character sets GSM 7-Bit default alphabet or UCS2 For coding in UCS2, the number of possible characters per SMS is reduced from 160 to 70 characters. More information regarding the character sets given here can be found at www.3gpp.org/ftp/Specs/archive/23_series/23.038/23038-900.zip.																
	✓	✓	✘	✘	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
48 hours holding time for a sent message in the case of a switched off or unreachable mobile phone																
	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Delivery of concatenated SMS (multi-part messages)[3] If concatenated SMS are used, the number of permitted characters is reduced to 153 (GSM 7-Bit default alphabet) or 67 characters (UCS2).																
	✓	✓	✘	✘	✓	✓	✓	✓	✓	✓	✓	✓	✘	✓	✓	✓
Processing of technical error notifications For example, incorrect number format or other errors related to delivery.																
	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

System requirements

The system requirements correspond to the use of Episerver Campaign. This service description is valid for delivery to a mobile number in the respective country. If the end user device of the SMS

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recipient is connected to the network via roaming, individual service features may be omitted or delivery of the SMS will generally be impossible. This depends on the operator and the regulations of the country in which the end user device is connected.

[1] Alphanumeric senders must be registered in advance.
[2] For detailed information visit: http://www.bundesnetzagentur.de/cln_1432/DE/Sachgebiete/Telekommunikation/Unternehmen_Institutionen/Nummerierung/TechnischeNummern/KWNummernMobilfunk/KWNummernMobilfunk.html
[3] Do not send more than 10 SMS (1,530 characters) for a Concatenated SMS. If you send more than 10 SMS, or 1,530 characters, it is not guaranteed that a multiple part message is sent or received correctly.

Episerver Fax

Even at a time when emails are commonplace, the advantages of using faxes as a marketing tool should not be underestimated. Episerver Campaign makes designing and sending fax campaigns[1] easy and convenient.

Direct marketing by fax is a handy way to let recipients know about special offers and reminders quickly and economically. The recipient can then use the fax to place an order – he/she only needs to return it. The following provides you with tips on how to design effective fax campaigns and improve response rates.

Legal framework

Generally speaking, delivery of a fax is only permitted if the recipient has provided consent. If the recipient has not explicitly granted consent to receive promotional materials by fax, the sending of such faxes constitutes a violation of §1 of the Unfair Trade Practices Act (UWG). In B2B marketing, sending of faxes within the scope of existing business relationships is permitted.

Designing fax mailings

The template used largely determines the effect a fax has on the recipient. The options available in designing faxes are more limited than with emails. But this need not be a disadvantage, as long as you keep a few things in mind when designing your template.

Fax machines differ greatly in terms of the quality of the printout they provide, which ranges from thermal paper to A4 laser printing. So you should always assume the lowest common denominator when creating a template. That way, you can be certain that the printout will be clear and above all legible, even when printed on the simplest fax machines made for home use. The simpler the layout, the easier it will be for the recipient to read the information. Excessive use of design elements distracts the reader from the message the fax is trying to get across.

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Template format

- The type of template format you need depends on whether or not you want to personalize the fax.
- For fax mailings that are not personalized, PDF documents may be the best choice. PDF files generally include font definitions that a fax machine is capable of reading.
- Personalizing a fax mailings requires that the template is copied into an HTML file. This file will then be used to generate a PDF file to send to each recipient during a mailing.
- The resolution used for a fax is customarily 96 dpi. Therefore, the total width of the template should be exactly 794 pixel (including margins) in order for the content to fill out the page (which corresponds to 21 cm, or the width of an A4-sized sheet of paper). Any graphics you use should also have a resolution of 96 dpi. Using a higher resolution will not produce a better result. A finely detailed design is also unnecessary, since the fax machine will not be able to support it. Moreover, very large volumes of data only make handling more difficult, slowing down processing due to the longer transmission times required.

Personalization is also commonly used in faxes

Episerver Campaign makes it easy to personalize faxes. This lets you reach out to your recipients in a less anonymous and more individualized way, provided you have the applicable information for each recipient (name, salutation).

Layout tips

The simpler your template is, the more attractive it will be to recipients. You should, therefore, use as few design elements as possible and state the core message as clearly as possible. You do not need to cram as much information as possible into a fax. See your website for more information or offer to send a brochure, etc. by mail. Bear in mind that a long, multi-page fax uses up paper and toner and also puts strain on both the recipient's patience and wallet.

Choice of color

- In general, fax machines can only print in two colors: black or white. But while black is produced by printing, white does not necessarily mean pure white since it depends on the type of paper being used. For the more important elements in a fax, such as text and logos, you should only use these two color formats (corresponding to 0/0/0 and 255/255/255 in the RGB space or #FFFFFF and #000000 in hex color codes).
- Gray-scale is normally used for shading and is unsuitable for use in the core elements of a template, since it renders texts illegible and makes images appear fuzzy.
- You should entirely forgo the use of colors, as they will usually be converted into gray-scale. Different colors (e.g. green and red) are rendered in the same gray-scale and cannot be distinguished from one another.

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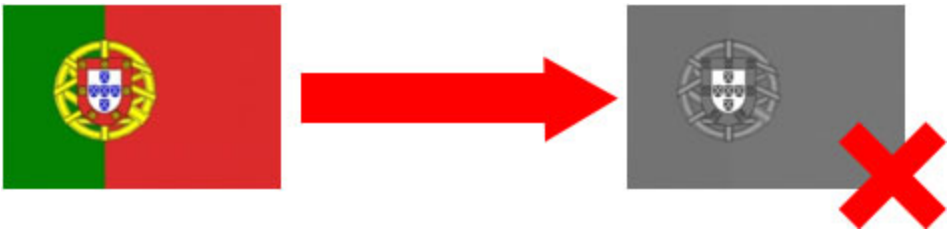


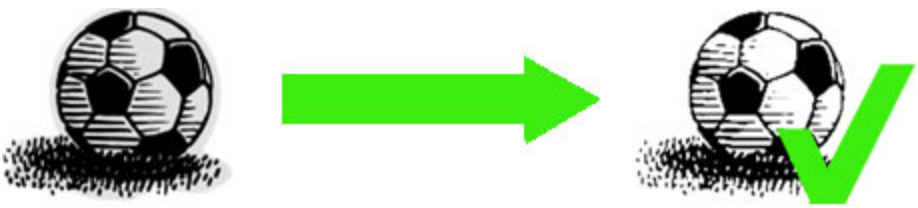
Contrasting colors may be lost when converted into gray-scale.

Text and typeface

- Informative elements (running text and titles) should be kept in a standard typeface (Arial, Verdana etc.) and where possible set to the generic typeface **serif** or **sans-serif**. This will allow a fax machine to produce the best quality printout.
  Only use **bold**, *italics* or underline for emphasis. Do not use special fonts or color highlighting.
- Creative text design (e.g. in images) should employ a distinct B/W contrast without gray-scale and smoothed edges to ensure legibility.
- Overly small fonts may adversely affect the legibility of a text, because the resolution of fax printouts is lower than that commonly used in printed advertisements (see the section on formatting templates). Fonts at 10 pt and above produce clearly legible running text while titles should be set to a minimum of 12 pt.
- Always use black on white text. If possible, try to avoid using inverted text.

Images and graphics

Images are only suitable for use in graphics to a limited degree. Color images in particular are often altered through data transfer and reproduction on a fax machine. If you must use images, it pays to edit them beforehand. Save all images and graphics in B/W mode. For best results, use bright, large format and high-contrast images.



Contrasting colors may be lost when converted to gray-scale.

Photographs are generally unsuitable, because they consist of a great many shades of gray. They should therefore not be used.

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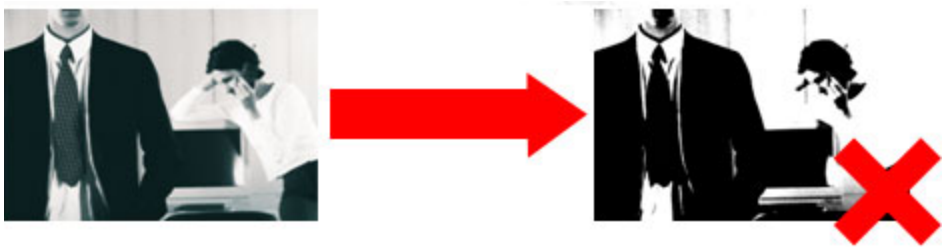

It is best to make as little use as possible of images and graphics. Large-format images unnecessarily consume a great deal of fax toner.

Other layout elements

Use a medium stroke width for separator lines, table frames, contours etc. Overly fine lines will be omitted or print out irregularly when reproduced by fax machines.

Keep it short and concise

- Keep your messages short and to the point. Do not use overly long and complex sentences. Limit yourself to essential information. Emphasize the main points. And bear in mind that fax mailings more than ten pages in length will tie up the recipient's fax machine for a long time and use up a lot of paper. So try to fit everything onto a single page of A4-sized paper.
- The title should tell the reader at a glance what the fax is about. An informative title is more likely to catch the recipient's attention.

Test your template

A fax template should always be tested before being sent out. In Episerver Campaign, you can upload a fax mailing prior to sending and then see for yourself how effective it is by using the **test fax** option. For testing, you should use an ordinary fax machine rather than a professional model.

[1] This feature is only available in Germany, Austria and Switzerland.

Smart Campaigns

Smart Campaigns allow you to quickly and intuitively create, start, monitor and evaluate regular campaigns. Campaigns are created and edited on a graphic desktop, while all elements for a campaign (recipients, target groups, A/B test and the message itself) can be found in the tool list. Drag the elements onto the desktop, create the links between the elements, enter the necessary parameters for each element (recipient list, name of target group, optimization parameters for A/B tests and message content) and then start the campaign.

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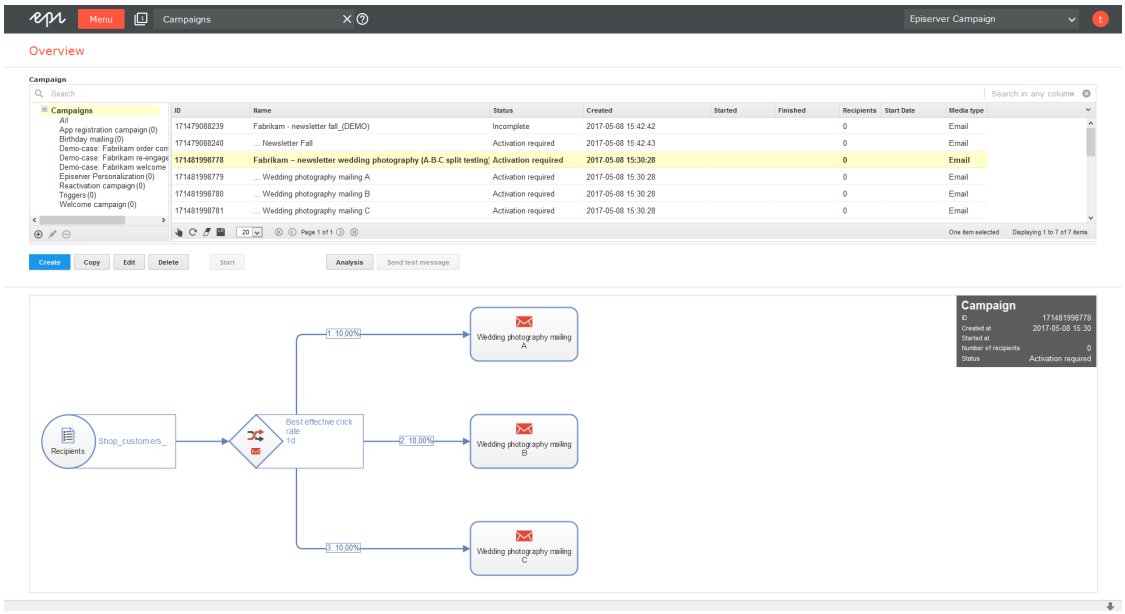
With Smart Campaigns, you can always see all of the elements and parameters, and can perfectly control and optimize your campaigns. You can evaluate your sent campaigns directly in the Smart Campaign working area, allowing you to receive feedback on the success of your campaigns.

Email, print[1], fax[2], push or SMS: Smart Campaigns are available via all channels.

Campaign overview



To open the overview, open the start menu and, under **Campaigns**, click **Smart Campaigns**.

All campaigns are displayed in the list at the top half of the window. In the **Status** column, you can see whether a campaign has already been sent or if it has not yet been activated.

Campaigns and messages

Both campaigns and messages are shown in the campaign overview list. You can tell that an item is a message because it will have three dots behind it: (...). Messages are always located underneath the campaigns to which they belong. The following conditions and relationships apply:

- There are no messages that do not belong to a campaign.
- To send a campaign, you will need to add a message.
- Messages sent in a campaign all need to be of the same media type (email, print, fax or SMS).

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- If you are using the **A/B test** (split test) node in a campaign, you will need to create two versions of the message you want to send. Split tests are a good idea if you want to optimize your campaigns. Split tests can be created with automatic optimization. In this case, the more successful message (in relation to the selected parameters) is sent automatically following completion of the split test.

Campaign type

Four campaign types can be selected for Smart Campaigns, each of which are sent via different channels. The recipient list and delivery channel for a campaign must be compatible:

- **Email**: Sends an email to the recipient. The recipient list must be of type **Email** or a multiple list.
- **Print**[1]: Sends a message to the recipient via post (letter or postcard). The recipient list must be of type **Print** or a multiple list.
- **Fax**[2]: Sends a fax message to the recipient. The recipient list must be of type **Fax** or a multiple list.
- **SMS**: Sends an SMS message to the recipient. The recipient list must be of type **SMS**, or a multiple list.
- **Push**: Sends a push notification to a recipient's Android or iOS device. The recipient list must be of type **Push** or a multiple list.

Campaign status

In the overview, a status is shown for each campaign. The statuses have the following meanings:

- **Incomplete**: Elements are missing or necessary parameters have not been defined. The campaign cannot be activated or started in this status.
- **Activation required**: The campaign contains all necessary elements and parameters. Campaigns with a specified sending time are sent automatically once activated. Campaigns that are sent manually must firstly be activated before they can be started.
- **Activated**: The campaign has been successfully activated and can be started, i.e. sent.
- **Sending**: The message(s) in a campaign is (are) being sent.
- **Paused**: The sending process has been paused manually, or the splits of an A/B test with manual optimization have been ended. You can restart the campaign by clicking `Start` or end the campaign by clicking `Cancel`.
- **Cancelled**: The campaign has been canceled and cannot be restarted.
- **Sent**: The campaign has been successfully sent.

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Campaign actions

The buttons underneath the campaign overview can be used to perform the following actions for campaigns:

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

Some of these actions are not available for incomplete campaigns or campaigns that already have been sent.

Create

→ To create a new campaign, click Create (for more information, read the Create and edit campaign section).

Copy

→ To copy an existing campaign, in the list, click on a campaign and then click Copy .

✔ All campaign elements (recipients, target groups, messages etc.) are applied.

Use this function if you regularly send similar campaigns. This will save you a lot of time as you will only need to adjust the values that have actually changed.

Notes

- Individual messages in the list cannot be copied.
- Messages are not stand-alone; they always belong to a campaign.
- You can reuse messages by selecting a message in the Select the type of content step.

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Copy Mailings Classic messages to Smart Campaigns

To migrate Mailings Classic mailings to Smart Campaigns and edit them directly there, you can copy mailings from Mailings Classic to the Smart Campaigns. To do this, perform the following steps:

→ 1. Select a Mailings Classic mailing from the list and click Copy.
✔ The selected mailing is duplicated and displayed as a campaign in the Smart Campaigns editing window.
→ 2. Make changes to the campaign if necessary.
→ 3. To save the campaign, click Save and close.
✔ The **Save campaign** dialog opens.
→ 4. Enter a new name if required.
→ 5. Click Save.
✔ You have successfully copied (and migrated) the selected Mailings Classic mailing to Smart Campaigns.

Edit

→ To make changes to a campaign, click on a campaign in the list and then click Edit (for more information, read the Create and edit campaign section).

Notes

- Campaigns that have already been sent can no longer be edited.
- Individual messages in the list cannot be copied.
- Messages are not stand-alone; they always belong to a campaign.
- If you want to edit a message, then you will need to edit the campaign to which this message belongs. Move the cursor over the message node, click **Edit** and then Edit content.

Delete

→ To delete a campaign, click on a campaign in the list and then click Delete.

Notes

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- You can only delete campaigns that have not yet been sent.
- Individual messages in the list cannot be deleted.
- Messages are not stand-alone; they always belong to a campaign.
- If you want to delete a message, then you will need to edit the campaign to which this message belongs. Move the cursor over the message node and click **Delete** .

Start/Activate

Notes

- Before you can start a campaign, you firstly need to activate it.
- Once a campaign is complete, i.e. all elements and necessary parameters have been defined, the status changes to **Activation required** and the `Activate` button is displayed.
- You can only activate campaigns, not messages.
- Incomplete campaigns cannot be activated or started.
- You can start either a campaign or the associated message(s).
- If a campaign only includes one message, then it doesn't matter whether you start the campaign or the message.
- If you have set the sending time using a wait node, this will only take effect once the campaign has been activated.
- If a campaign includes an A/B test, you will be able to start the splits for this campaign individually.
- If you have selected the **Start optimization manually** option in the A/B test, then select all campaign splits after the campaign has been sent, and then click `Optimize` to send the optimized message to the rest of the distribution list.

1. To activate a campaign, in the list, click on a campaign and then click `Activate`.

Once you have activated the campaign, messages linked to the **Wait** node are automatically started at the specified time.

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Once activated, the campaign is validated along with all parameters (recipients, target groups, message).

→ 2. Confirm the activation in the dialog box by clicking Activate campaign.

✔ Once a campaign has been activated successfully, the button will change to Start.

→ 3. Click this button to manually start sending the message(s) that belong to a campaign with the specified parameters (target groups, reductions in sending speed).

✔ If the campaign includes an A/B test, then the different versions of the message are firstly sent to a defined number of recipients and the more successful message is then sent to the rest of the distribution list.

Copy to client

If this additional feature is enabled, you can copy campaigns to other clients. Recipient lists and target groups are not transferred to the target client.

In order to copy a campaign to another client/other clients, the following prerequisites must be met:

- The registered user must have permission to create mailings in the target client.
- The same template you used in the campaign you wish to copy must also be set up in the target client.

To copy a campaign to other clients, perform the following steps:

→ 1. In the campaign overview, select the campaign you wish to copy.

✔ The Copy to client button is activated.

→ 2. Click Copy to client.

✔ The **Copy campaign to client** window opens.

→ 3. In the **Campaign** area, enter the name for the copy of the campaign in the target client in the **New campaign name in the target client** field.

→ 4. In the **Target clients** area, select the client to which you would like to copy the campaign by selecting the corresponding check box.

To select all available target clients, select the check box in the menu bar.

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→ 5. Click Copy.

✔ The copy process starts. Once the copy process is completed, the message **Copy process completed** is displayed.

→ 6. To exit the window, click Close.

Analyses/Preview

To display the dispatch performance or to display various previews, perform the following steps:

→ 1. In the campaign overview, click a campaign and then Analysis.

✔ The **Campaign analysis** window opens.

→ 2. Click Start new analysis.

✔ At the top right, a summary of the entire campaign is displayed. Additionally, for each individual node the number of recipients is displayed.

→ 3. To view the order reference for a print message, in the message node, under **DPAG order reference**, click **Details**. For more information on the DPAG order reference, refer to the View the DPAG order reference section.

→ 4. To view the **Send time optimization overview** (additional feature), click the corresponding **Wait** node or **A/B test** node.

→ 5. To preview the message, click the corresponding message node.

✔ A preview opens to the right.

In print messages, the display of personalized recipient data added via a field function will fail if you have not connected the message node with the **Recipients** node.

The following options are available in the preview:

» : Click this button to display all available subject lines. To the right below the individual subject lines, the number of recipients who receive the message with the respective subject line is displayed.

» Target groups: This button will not become active until at least one of the paragraph uses a target group. Click this button, select one or more target groups and click Submit selection to display only the paragraphs that are assigned with the selected target groups.

» and : The buttons only become active when you use a target group in at least one paragraph.

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

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➜ Click to deactivate the display of assigned target groups.

➜ If you don't want to enable or disable the display of all target groups, but rather just the display of a single target group, click the relevant paragraph .

» **Display container paragraph**: Paragraphs that contain **several sub-paragraphs with their own** target groups are marked in the content preview as **container paragraphs**. For quick recognition of the container paragraphs, the display is highlighted with a yellow border.

The target groups applied in container paragraphs are automatically carried over to all sub-paragraphs included. If you hide target groups in container paragraphs using the button Hide target groups, not only the container paragraph is hidden, but also the sub-paragraphs it contains.

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

» **Recipient selection for personalized view**: To display a personalized preview with the data of a specific recipient, in the left column, select a recipient list and then in the right column, select the recipient.

» **Change view**: The tab bar on the upper left border includes the HTML, mobile and text message previews. In the HTML preview, the mailing is displayed to the greatest extent possible as it will later appear in the recipients' inboxes. Under the Mobile tab, the message can be viewed as it appears on mobile devices. The Text tab displays the automatically generated text version of the mailing.

» Save result as image or Save result as PDF: Click one of the buttons to save the content template as an image or PDF (only for Print campaigns).

[1] This feature is only available in Germany.
[2] This feature is only available in Germany, Austria and Switzerland.

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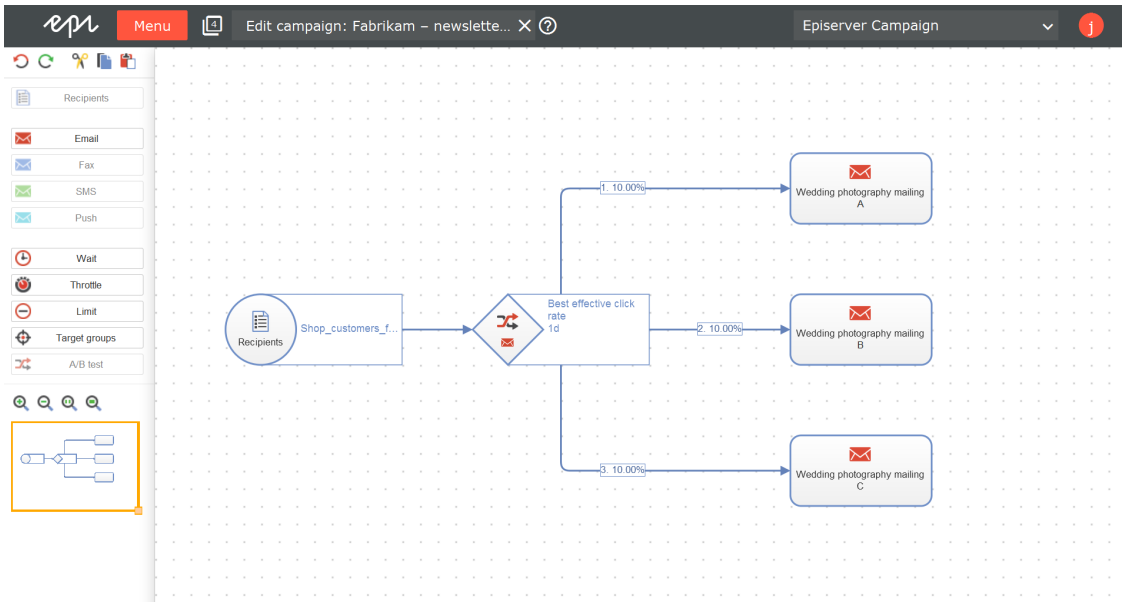
Create and edit campaign

Drafts



When editing a campaign, the latest version is automatically saved as a draft at regular intervals. If a campaign is closed unintentionally, you will be able to retrieve the latest version. Perform the following steps in the **Campaigns** window:

1. Below the campaign overview, click Create.
2. The **Select campaign draft** window opens.
3. In the **Draft** drop-down list, select the required draft and then click Apply.

> Drafts are saved together with the date and time, so that you can use this time stamp to find even unnamed campaigns that have not been saved.

4. Continue to edit the draft as described from step 3 in the Create campaign section.

Create campaign

To create a campaign, perform the following steps in the **Campaigns** window:

1. Below the campaign overview, click Create.
2. The **Select campaign draft** window opens.
3. In the **Draft** drop-down list, click **---Empty design---** and then click Apply.

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→ 3. Drag the campaign elements (so-called nodes) from the left action area to the working area on the right.

To start a campaign, the campaign must include at least the following elements:

- **Recipient list(s)**
- **Message**

The following optional elements can also be added:

- **Target groups** [1]
- **Limitation of recipient number** [1]
- **Delay** [1]
- **Throttle** [1, 2]
- **A/B test** [1, 2, 3]

→ 4. Click Save or Save and close.

→ 5. In the dialog box, enter a name for the campaign and click Save.

✔ A campaign validation is carried out. If there are any missing elements or parameters, a "Campaign contains validation errors" message is displayed. If you want to save the campaign anyway and fill in the missing details at a later date, click Force save, or otherwise click Keep editing and fill in the missing details for the campaign. The new campaign will then be displayed in the campaign overview.

Edit campaign

→ To edit an existing campaign, in the **Campaigns** window, select the required campaign from the list and click Edit. Proceed as described from step 3 in the Create campaign section.

Edit nodes

The campaign modules for Smart Campaigns are known as nodes. The available nodes can be seen in the left-hand action area.

→ Drag and drop the desired node onto the desktop to insert it into a campaign.

All nodes in a campaign must be connected; there must not be any unconnected nodes. The editing options for nodes and connections are explained below.

- Insert
- Connect
- Delete
- Properties

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Insert

→ You can insert nodes easily and convenient by dragging and dropping them from the action area to the working area.

Connect

→ To create a connection, click the node from which you want to create a connection and draw a connection to the target node.

You can decide where on the node the connection should be created. Each node has connection points at the right, left, upper and lower side and in the middle of the node. To start the campaign, each node must be connected.

Delete

→ To delete a node or a connection, move the cursor over the item and click **Delete** . Alternatively, you can also select the item and press **[Del]**.

Properties

→ To edit the properties of a node or a connection, move the cursor over the item and click **Edit** . Alternatively, you can also double click the item.

Editing tools

To make editing of your campaign as simple and convenient as possible, the windows **Create campaign** and **Edit campaign** contain the following editing buttons:

To quickly use the functions of these buttons, you can also use the above mentioned shortcuts (see parentheses).

- **Undo (Ctrl + Z)** : Click this button to revoke the last action. Every further click on this button revokes a further action.
- **Redo (Ctrl + Y)**: Click this button to restore an action you revoked before. Every further click on this button restores a further action.
- **Cut (Ctrl + X)**: Click this button to cut out selected items and temporarily copy them to the clipboard.
- **Copy (Ctrl + C)**: Click this button to copy selected items to clipboard.
- **Paste (Ctrl + V)**: Click this button to insert elements you previously cut out or copied.

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To make navigating through your campaign as simple and convenient as possible, the windows **Create campaign** and **Edit campaign** contain the following navigation tools:

- **Zoom in**: Click this button to zoom in the working area. Each click magnifies the working area to the next zoom level.
- **Zoom out**: Click this button to zoom out the working area. Each click reduces the working area to the next zoom level.
- **Actual size**: Click this button to restore the original view. All zoom settings are reverted.
- **Fit on screen** (Show all): Click this button to display all items that are on the working area.
- **Minimap**: The minimap allows you to quickly and easily navigate through the entire campaign. Just drag the yellow rectangle to the place you want to navigate to.To zoom in or out the working area using the minimap, click and drag the bottom right corner of the yellow rectangle either to the left (zoom in) or to the right (zoom out).

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

Smart Campaigns nodes

All campaign elements are defined using nodes. Each node defines one campaign element and transfers this element to the following node. You can use "connections" to connect the nodes to one another in a logical manner and define the sequence for your campaign. The arrow at the end of each connection points to the following node and the related action.

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

This topic contains information on the different nodes and what needs to be taken into account when using these nodes.

There are a number of possible causes for a node being grayed out:

- You can use only one media type per campaign. Once you have dragged an email node onto the desktop, for example, the nodes for fax, print and SMS will be deactivated.

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- You have already used a node of the same type in your campaign. The **Recipients**, **Limit**, **Target groups** and **A/B test** nodes can each only appear once in a campaign.
- You do not have the necessary permissions. For example, users may have permission to send email campaigns but not to send SMS campaigns.
- The media type is not configured in your client.

Compulsory elements

The following elements must be included in each campaign so that the campaign can be started:

- Recipients
- Email
- Fax
- SMS
- Push
- Print

Recipients

This node is used to select one or more recipient lists for sending.

→ To edit this node, click **Edit** and proceed as described in the table:

Parameter	Description
Recipient lists	Select all recipient lists to which you would like to send the messages. At least one recipient list must be selected. The type of recipient list must be compatible with the type of message being sent. For example, you can only sent a print message to a print recipient list (or a multiple recipient list)

Email

This node is used to create the actual message to be sent later. The message type must be compatible with the selected recipient list.

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→ To edit this node, click **Edit** and proceed as described in the table:

Parameter	Description
Name	Enter a name for the message in this box. This name will only be used internally.
Description	Enter an optional message description in this box.
Edit content	Click this button to add content. Then perform the steps described in the Edit message content section.
Test email	Click this button to start a test dispatch. The **Send test message** window opens. Then perform the following steps: → 1. In the **Recipient list** drop-down list, select a recipient list with test recipients. → 2. If you want to simulate a target group, in the **Simulate target group** drop-down list, select a target group. The test recipients selected in the next step must not belong to this target group. → 3. In the list, select one or more test recipients. → 4. Click Send email to send the test messages in multi-part format or click Send HTML version or Send text version if you only want to test one of these formats.

Fax[1]

This node is used to create the actual message to be sent later. The message type must be compatible with the selected recipient list.

→ To edit this node, click **Edit** and proceed as described in the table:

Parameter	Description
Name	Enter a name for the message in this box. This name will only be used internally.
Description	Enter an optional message description in this box.
Edit content	Click this button to add content. Then follow the steps described in the Edit message content section.

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Parameter	Description
Test fax	Click this button to start a test dispatch. The **Send test message** window opens. Then perform the following steps: → 1. In the **Recipient list** drop-down list, select a recipient list with test recipients. → 2. In the list, select one or more test recipients. → 3. Click Send fax to start the test dispatch.

SMS

This node is used to create the actual message to be sent later. The message type must be compatible with the selected recipient list.

→ To edit this node, click **Edit** and proceed as described in the table:

Parameter	Description
Name	Enter a name for the message in this field. This name will only be used internally.
Description	Enter an optional message description in this box.
Edit content	Click this button to add content. Then follow the steps described in the Edit message content section.
Test SMS	Click this button to start a test dispatch. The **Send test SMS** window opens. Then perform the following steps: → 1. In the **Recipient list** drop-down list, select a recipient list with test recipients. → 2. In the list, select one or more test recipients. → 3. Click Send SMS to start the test dispatch.

Push

This node is used to create the actual message to be sent later. The message type must be compatible with the selected recipient list.

→ To edit this node, click **Edit** and proceed as described in the table:

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Parameter	Description
Name	Enter a name for the message in this box. This name will only be used internally.
Description	Enter an optional message description in this box.
Edit content	Click this button to add content. Then follow the steps described in the Edit message content section.
Test push message	Click this button to start a test dispatch. The **Send test message** window opens. Then perform the following steps: → 1. In the **Recipient list** drop-down list, select a recipient list with test recipients. → 2. In the list, select one or up to five test recipients. → 3. Click Send push message to start the test dispatch.

Print[2]

This node is used to create the actual message to be sent later. The message type must be compatible with the selected recipient list.

→ To edit this node, click **Edit** and proceed as described in the table:

Parameter	Description
Name	Enter a name for the message in this field. This name will only be used internally.
Description	Enter an optional message description in this box.
Edit content	Click this button to add content. Then follow the steps described in the Edit message content section.
Test message	Before initiating a print mailing via post, we recommend always carrying out a test dispatch first: → 1. Click this button to initiate a test send free of charge. ✔ The **Send test message** window opens. → 2. In the **Recipient list** drop-down list, select a recipient list with test recipients. → 3. In the list, select one or more test recipients. → 4. To initiate the test dispatch, click Send by post. ✔ The print template will be generated from the message, forwarded to the print

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Parameter	Description
	and mailing service provider and sent by post. Delivery to the test recipient is generally within two working days. To ensure that your print mailing meets the requirements for machine-readable processing in the postal system, we recommend the following: » In the Edit content window, use the Letter DIN A4 (PDF), Postcard DIN A6 (PDF), and Postcard DIN lang (PDF) buttons to create a test PDF of your letter which you can print. This allows you to check the layout of your letter before sending it. Color reproduction on your printout is dependent on the printer used, the type of paper and the print settings. Most office printers are also unable to print borderless documents. If, for example, you want to do a test print of a postcard with an all-over background image, you will usually see a margin around the edges, and the size of the print is reduced to fit this margin. Such a test print is not suitable for judging the color reproduction and feel of the finished print. Borderless printing of background graphics is not possible using conventional printers. » Always carry out a test dispatch. This is the only way to ensure that a print mailing can actually be delivered successfully and for you to check the finished print and colors used.

Optional elements

You have the option of adding the following elements to a campaign. These nodes can only be inserted at certain positions.

- Wait
- Throttle
- Limit
- Target groups
- A/B test

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Wait

Notes

- This node is **not** available for transactional mails or confirmations.
- For print messages, the print template is created at the dispatch time, and transferred to the printing and delivery provider. Depending on the selected dispatch type, the post-based delivery of the mail will arrive in one to four working days.

This node specifies the start time of a message. Campaigns containing a **Wait** node can be activated at any time, and the messages will then be sent at the specified time.

You can use this node in combination with an A/B test to define the sending time of each split.

To edit this node, click **Edit** and proceed as described in the table:

Parameter	Description
Wait until...	Specify the date on which a message or split is to be sent.
at ...	Specify the time at which a message or split is to be sent.
Wait until import has finished	If you are using the closed-loop interface, activate this option to send the messages after the recipient import. If you enable this option, you must not activate the campaign.
Start at ... after import has been finished	If you are using the closed-loop interface, activate this option to send the messages after the recipient import at the time specified here. If you enable this option, you must not activate the campaign.

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Send time optimization

If the **Send time optimization** additional feature is enabled in your client, additional options are available in the **Wait** node.

When you use the send time optimization, you must also specify a wait option in the **Send date** area. The wait option is required as a time reference point for the send time optimization. In addition, the fallback time is determined for all recipients for whom there is not enough behavioral data to determine an optimal send time.

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

You can find detailed information about the send time optimization in the **Wait** node in the following section: Send time optimization in the Wait node.

Throttle

This node is **not** available for transactional emails, confirmations or print messages.

This node can be used to specify the dispatch rate. In certain cases, it is advisable to select a lower dispatch rate. If you are sending a coupon in an email, for example, this can cause your online shop to be overloaded. In cases like this, a reduction in dispatch rate is recommended.

→ To edit this node, click **Edit** and proceed as described in the table:

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

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Limit

This node is **not** available for transactional mails or confirmations.

This node can be used to specify how many recipients (percentage or absolute value) you want to contact. Place this node in front of the message node and specify how many recipients you want to contact. You can specify the number of recipients as a percentage or absolute value .

To edit this node, click **Edit** and proceed as described in the table:

Parameter	Description
Percent	Specify the percentage of recipients to be contacted. Enter a value between 1 and 100. If you use a percentage, the number of recipients will be calculated based on **the global number of recipients from all recipients lists selected in the Recipients node (=100 %)**. Other limiting elements, like target groups are not taken into account.
Recipients	Specify the actual number of recipients to be contacted. Enter an absolute value. If this value is higher than the number of possible recipients, then all recipients will be contacted.

Target groups

This node is **not** available for transactional mails or confirmations.

This node can be used to limit the selection of recipients based on additional criteria (more information about this can be found in the chapter Target group definition). Place this node between the **Recipients** node and the **Messages** node. The **Target groups** node itself does not contain any additional parameters. To specify a target group, create an outgoing connection, click on this outgoing connection, and define a target group or select an existing target group.

To edit this node, click **Edit** and proceed as described in the table:

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Parameter	Description
Target group	Enter a name for the target group here. This name will only be used internally in the campaign. Define the desired target group definition. More information on this topic can be found in the chapter Target group definition.

A/B test

Notes

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

This node can be used to ensure optimal sending conditions for your message. More information on this topic can be found in the Split dispatch chapter.

→ To edit this node, click **Edit** and proceed as described in the table:

Parameter	Description
Activate automatic optimization	Select this check box if you want to select the message that was the most successful in the splits based on one of the criteria in the following line. This option is **not** available for print messages.
Type of optimization	In this drop-down list, select one of the following options: - **Best effective click rate**: Episerver Campaign sends the message with the best ratio of unique openings to unique clicks. - **Best unique click rate**: Episerver Campaign sends the message that has generated the highest percentage of clicks from individual recipients. - **Best unique open rate**: Episerver Campaign sends the message that has been opened by the highest percentage of recipients. - **Lowest unique unsubscribe rate**: Episerver Campaign sends the message that has generated the lowest percentage of unsubscriptions from individual

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Parameter	Description
	recipients. » **Lowest bounce rate**: Episerver Campaign sends the message that has generated the lowest percentage of return messages. » **Highest turnover**: Episerver Campaign sends the message that has generated the most turnover. This option is only available if you are using post click tracking or one of our web analytics or E-commerce integrations.
Sending date for the optimized message	If you have activated the automatic optimization function, you can select one of three options to trigger sending of the optimized message to the rest of the recipients: » **Date and time**: Select this option if you want to send your optimized message at a specified time. For example, this is the most appropriate option if you always send messages at 3 PM on Thursdays and your recipients are used to receiving your messages at this time. » **Delay after last split**: Select this option if you want to make sure that your recipients have enough time to open a message and to click on the links (regardless of when you start the optimization). You can draw conclusions from this for the optimization of your campaign. This is the most appropriate option if, in your experience, your recipients read a message and click on links in the first two days following receipt. » **Manual**: Select this option if you want to have full control over the sending of the optimized message. You can then start the optimization process in the **Campaigns** window once all splits are complete, by clicking Optimize .

Send time optimization

If the **Send time optimization** additional feature is enabled in your client, additional options are available in the **A/B test** node.

When you use the send time optimization, you must also specify a date and time or select the **Manual** option under **Sending date of the optimized message**.

Parameter	Description
Send time optimization	Select the check box to enable automatic send time optimization.

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Parameter	Description
24 hours/7 days (not available for the **manual** option)	Select the period of time during which the send time can be optimized.
Date slider	Use the date slider or the arrow keys to change the start and end times.

You can find detailed information about the send time optimization in the **A/B test** node in the following section: Send time optimization in the A/B test node.

[1] This feature is only available in Germany, Austria and Switzerland.
[2] This feature is only available in Germany.

Edit message content

➜ To configure a message and add content, move the cursor onto the message you want to edit, click **Edit** and then Edit content.

✔ The **Edit content** window opens, and you will be able to perform the following steps:

- Step 1 – Select Content Type
- Step 2 – Configure the message
- Step 3 – Layout settings and content

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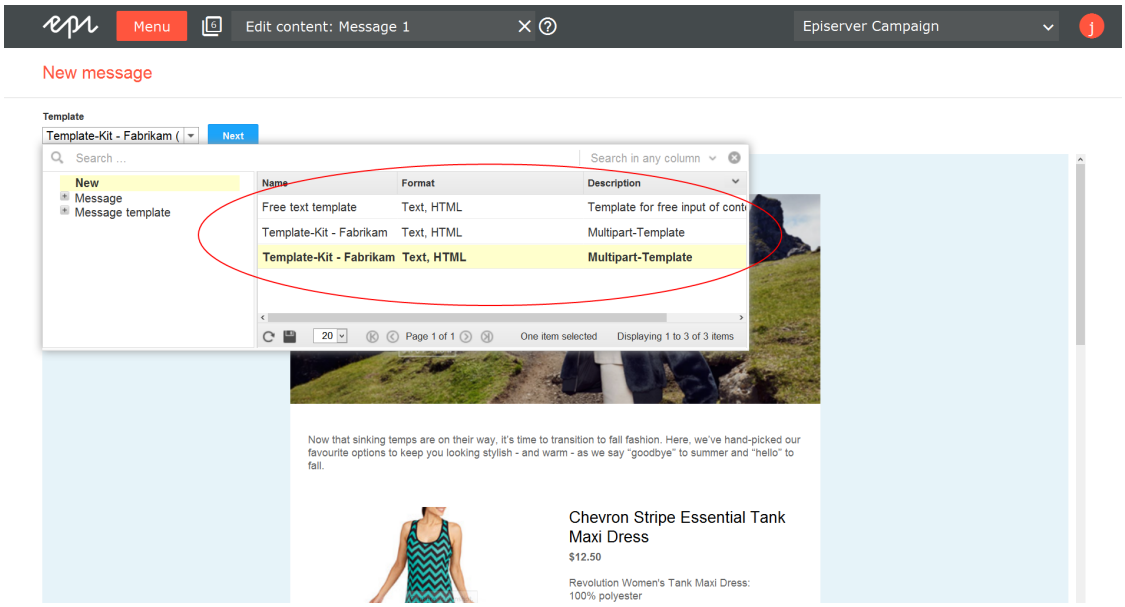
Step 1 — Select Content Type



Depending on the message type, you will need to select the source or template from which you would like to create the message:

- Email
- Fax
- SMS
- Push
- Print

Email

If you edit an email for the first time, you will firstly need to select a template:

1. In the Template drop-down list, select one of the following options.
   - **New**: To create a message from a template (e.g. the Episerver Template Kit) or to enter your own HTML into the free-text template, click **New** in the left-hand column and then select a template from the list on the right.
   - **Message**: To apply content from an existing message, click **Message** in the left-hand column and then select a message from the list on the right. You can select both, new messages and messages that have already been sent.

If you have previously worked with the Mailings Classic function, you can also select mailings here and apply the content created using this function.

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- **Message template**: If you want to regularly send messages with the same sender number (e.g. "Our offers of the week"), click **Message template** in the left-hand column and then select the required template from the list on the right. The subject, sender information and attachments are already configured in the message templates. If you select this option, you will be able to skip the following step. More information on this topic can be found in the Message templates section.

→ 2. Click Next.

Fax[1]

If you are editing a fax for the first time, you will firstly need to select whether you want to create the fax yourself using a template, or if you want to send an existing PDF file.

To create the fax yourself, perform the following steps:

→ 1. Click Template.

→ 2. In the **Template** drop-down list, select one of the following options.

- **New**: To create a message from a template or to enter your own text into the free-text template, click **New** in the left-hand column and then select a template from the list on the right.
- **Message**: To apply content from an existing message, click **Message** in the left-hand column and then select a message from the list on the right. You can select both new messages and messages that have already been sent.

If you have previously worked with the Mailings Classic function, you can also select fax mailings here and apply the content created using this function.

- **Message template**: If you want to regularly send messages with the same sender number, click **Message template** in the left-hand column and then select the required template from the list on the right. The sender number and content are already configured in the message templates. If you select this option, you will be able to skip the following step. More information on this topic can be found in the Message templates section.

→ 3. Click Next.

If you want to send an existing PDF file, perform the following steps.

→ 1. Click PDF.

✔ A list of all available PDF files is displayed.

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→ 2. In the list, click the file that you want to send as a fax.

→ 3. Click Apply.

If you want to send a new PDF file, perform the following steps.

→ 1. Click PDF.

✔ A list of all available PDF files is displayed.

→ 2. Click New.

✔ The **Add attachment** window opens.

→ 3. In the **Source** area, select whether you want to upload the attachment from your hard drive or from an URL.

- **Upload from hard drive**: Select this option to upload a file located on your local hard drive.
- **Use URL**: With this option, the file is not imported; instead, an URL for the file's location on the Internet is simply put onto the server. The file is only downloaded from the specified URL by Episerver Campaign on sending, and is sent together with the mailing. You should only select this option if you can be sure that it will still be possible to locate the file at the same URL at a later date.

→ 4. If you have selected the **Upload from the hard drive** option in the previous step, then click Browse... and select the required file from your hard drive. If you have selected the **Use URL** option, then enter the Internet address where the file is located into the **URL** box, starting with http://.

→ 5. In the **File name** box, enter a meaningful name.

Avoid cryptic names such as `20041108_pricelist_complete_emea.pdf`, and instead use names that are simple and as short as possible, e.g. `pricelist.pdf`. You should always retain the file extension (e.g. pdf or .doc) so that the recipient can tell the file format.

→ 6. In the **Description** box, enter a description of the file.

The description is only used internally by Episerver Campaign. It will not be part of the mailing when you send the file.

→ 7. Click Save.

✔ The file or the link to the file is saved in the database.

→ 8. In the list, click the file that has just been uploaded and then click Apply.

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SMS

If you want to edit an SMS message, you do not need to select a source or template for the content of the message. You can jump directly to the second step and edit the sender information and content of the message.

Push

If you want to edit a push message, you do not need to select a source or template for the content of the message. You can jump directly to the second step and edit the options and content of the message.

Print[2]

If you edit a Print message for the first time, you will firstly need to select a template:

1. In the **Template** drop-down list, select one of the following options:
   - **New**: To create a message from a template or to enter your own text into the free-text template, click **New** in the left-hand column and then select a template from the list on the right.

     #### Formats

     Three standard formats are available to you for postal mailings in Episerver Campaign.

     - **Letter DIN A4:** The standard letter gives you the most flexibility. You can send letters with one or more pages. Letters are folded into DIN lang format and placed in an envelope.
     - **Postcard DIN A6**: Select this format for customer reply cards, advertising etc. The front side has fields for the sender, address, franking and coding areas that cannot be used. You can write your contents on the entire reverse side (taking the minimum margins into account).
     - **Postcard DIN lang**: Select this format for decorative cards, advertising etc. The front side has fields for the sender, address, franking and coding areas that cannot be used. You can write your contents on the entire reverse side (taking the minimum margins into account).

   - **Message**: To create a copy of an existing message, click **Message** in the left-hand column and then select a message from the list on the right. You can copy both new messages and messages that have already been sent.

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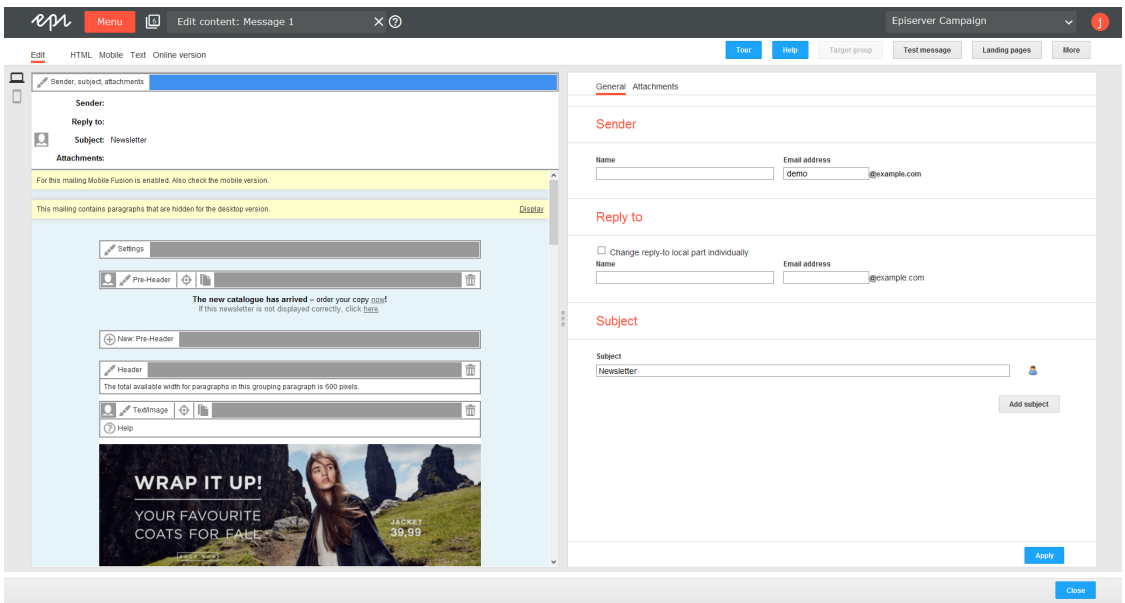
- **Message template**: If you want to regularly send messages with the same dispatch option, click **Message template** in the left-hand column and then select the required template from the list on the right. The format and dispatch options are already configured in the message templates. If you select this option, you will be able to skip the following step. More information on this topic can be found in the Message templates section.

2. Click Next.

[1] This feature is only available in Germany, Austria and Switzerland.
[2] This feature is only available in Germany.

Step 2 — Configure the message



To send a message, it must be configured. Depending on the selected delivery channel, additional parameters must also be defined in addition to the sender information.

Email

Fax

SMS

Push

Print

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Email

Sender information, subject and attachments

To configure an email for dispatch, perform the following steps.

Sender information

1. Right at the top of the **Edit content** window, click Sender, subject, attachments.
2. In the **Sender** area, specify the sender information that you want the recipients of your mailing to see. There are two parts to this information:
   - **Name**: This name is displayed as the sender information in the recipient's email program. The company name is usually used here.
   - **Email address**: Enter the address part of the sender information.
3. In the **Reply to** area, enter the reply-to name to be displayed in the recipient's email program.

Subject

1. In the **Subject** area, enter a subject for your message.

   Together with the sender information, the subject line (Subject) for your mailing is the most important factor in deciding the success of a mailing. The "right" subject line can significantly increase the opening rate for a mailing. Do not make your subject line too long, as otherwise it might be "cut" by the email program. Sticking to a length of 45 characters ensures that the subject line will be displayed in full. The benchmark of 60 characters is given as the maximum length, and this will be displayed in full by the majority of email programs.

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

Attachments

Three options are available to you for adding attachments to messages. Files that you have already uploaded can be selected as an attachment, files from your hard drive can be uploaded and then attached, or you can provide a URL to link to an externally stored file.

Select previously uploaded files to attach

To select a previously uploaded file as an attachment, perform the following steps:

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→ 1. Switch to the **Attachments** tab.

✔ All available attachments are displayed in a list.

→ 2. Click on the file in the list that you would like to send.

→ 3. Click Apply.

✔ You have successfully attached the selected file to your message. The name and size of the file are shown below the subject of your message.

Upload files from your hard drive

To upload a file from your hard drive, perform the following steps:

→ 1. Switch to the **Attachments** tab and click New.

→ 2. Select the option **Upload from hard drive** if not already selected.

→ 3. In the **Select file** area, click Browse....

✔ A Windows Explorer window opens. On macOS a Finder window opens.

→ 4. Navigate to the file you want to upload and confirm your selection.

✔ The **File name** field in the **Properties** area shows the name of the file.

→ 5. Alternatively, you can enter a different name.

→ 6. In the **Properties** area, in the **Description** field, enter a description.

→ 7. To upload the file, click Save.

✔

Episerver Campaign will create a copy of your file. If you delete a file on your hard drive, the file will remain available in Episerver Campaign.

→ To attach the uploaded file to your message, select the file in the list and click Apply.

✔ You have now successfully attached the uploaded file to your message. The name and size of the file are shown below the subject of your message.

Link to an externally stored file

To link to an externally stored file, perform the following steps:

→ 1. Switch to the **Attachments** tab and click New.

→ 2. Select the **Use URL** option.

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3. In the **File selection** area, in the **URL** field, enter the URL that refers to the file.
4. In the **Properties** area, in the **File name** field, enter the name of the file.
5. In the **Properties** area, in the **Description** field, enter a description.
6. Click Save.
✔ The file you have linked to is displayed in the **Attachments** area.
7. To attach the linked file to your message, select the file in the list and click Apply.
✔ The name and size of the externally stored file are shown under the subject of your message.

Episerver Campaign will load the linked file from the external source shortly before sending and attach it to your message.

Tracking

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

1. At the top right-hand side of the **Edit content** window, click More and then in the menu, click **Edit tracking links**.
2. If you want to globally deactivate the tracking of opens or clicks, clear the **Track opens** or **Track clicks** check boxes.
3. If you want to deactivate the tracking of all links for the HTML version or the text version of the message, click **Tracking disabled** next to **Default setting for HTML links** or **Default setting for text links**.
4. If you want to configure tracking for individual links, click the link in the **Edit tracking links** list, and then click Edit link.
5. In the **Track in HTML** column, select one of the following options:
   - **Default setting**: This option applies the global settings to this link.
   - **Enabled**: This option activates tracking for this link, even if tracking has been globally deactivated.
   - **Disabled**: This option deactivates tracking for this link, even if tracking has been globally activated.
6. Proceed in the same way in the **Track in text** column.
7. Change the automatically generated link descriptions in the **Description** column to make the descriptions more meaningful. The link descriptions will help you to decide whether to allocate a link URL to a topic or to a landing page.

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8. The **Occurrences** column indicates how frequently a link appears in the message.
9. You have the option of entering a click profile for this link in the **Click profiles** column.

You can also assign click profiles automatically in a rule-based manner.

10. Click Apply.

Using HSTS

If you use HSTS in your web server (to which the links refer), either disable HSTS in your web browser or create an SSL certificate.

For this, provide the following information:

- **Domain**: The domain (for example, "example.com") for which the certificate needs to be created.
- **IT contact person**: A contact person from your IT department. The following information is required: First name, last name, company name, address, postal code, phone number, email address, and fax number.
- **Organizational contact person**: An organizational contact. The following information is required: First name, last name, company name, address, postal code, phone number, email address, and fax number.
- A**dministrative email address**: An email address that you use to manage the certificate. An email address that is assigned to your domain is required for this purpose. For example, if you use the domain "newsletter.example.com", the email address must be either "admin@example.com", "administrator@example.com", "hostmaster@example.com", or "webmaster@example.com". Only the local parts "admin", "hostmaster", "webmaster" or "administrator" may be used.

Encoding

This setting allows you to specify the character set with which you would like to encode your mailing. In addition to the standard characters (Latin letters, numbers, punctuation characters), the character set also includes special characters (such as German umlauts). Characters that would be displayed

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incorrectly or not at all on the recipient's computer can be correctly interpreted in this way. To configure the message encoding, perform the following steps:

1. At the top right-hand side of the **Edit content** window, click More and then in the menu, click **Character set ("Encoding")**.
2. Select the required character set.
   - **ISO-8859-1**: Select this encoding if you are contacting recipients in German-speaking regions, Western European countries and North America.
   - **ISO-8859-2**: Select this encoding if you are contacting recipients in Central/South-Eastern European countries, e.g. in Poland, Croatia or Slovakia.
   - **UTF-8**: The UTF-8 format supports most of the special characters found in all languages. Select this encoding if you are contacting recipients in other parts of the world, e.g. in Eastern Europe or Turkey.
3. Click Apply to complete the encoding configuration.

Fax[1]

To configure a fax for dispatch, perform the following steps:

1. Right at the top of the **Edit content** window, click Sender .

   If you have selected a PDF file for dispatch, you will find the sender information in the **Sender** area.

2. If multiple telephone numbers have been configured as sender information in your client, select the required number from the **Sender number** drop-down list. If just one sender number is configured, you do not need to select anything here.
3. Click Apply .

SMS

To configure an SMS for dispatch, perform the following steps:

1. If multiple telephone numbers have been configured as sender information in your client, in the **Edit content** window, select the required number from the **Sender number** drop-down list. If just one sender number is configured, then you do not need to select anything here.
2. In the **Limitation of SMS messages** drop-down list, select the maximum number of messages to be sent to ensure that the content is not longer than the selected limit. You will then receive a warning message if the content exceeds the limit.

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A maximum of 160 characters can be sent per SMS. Longer messages are split into several SMS messages, and are merged back to form one message when received by the recipient. Each SMS message incurs a cost.

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

4. To enter personalized text, click **Insert field function** and select the required recipient list field or the required field function from the list. You can use personalizations to add the name of the recipient to the message (e.g. "Hello John Doe...").

When using personalized text, the maximum specified message count may be exceeded if the added text (e.g. name of recipient) is too long. In this case, the message will be sent in full, but charges may be incurred for more SMS messages per recipient than specified in the setting for the message limit.

5. Click Save.

Push

To configure a push message for dispatch, perform the following steps:

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

This title will be displayed on Android devices only. iOS devices always show the name of your app. Nevertheless, always enter a title.

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

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

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Reserved deep links and prefixes

The following deep links are reserved and must not be used:

- from
- dry_run
- restricted_package_name
- delivery_receipt_requested
- delay_while_idle
- content_available
- message_id
- notification_key
- registration_ids

Likewise, the following prefixes must not be used in deep links:

- google
- gcm

4. In the **Expiry date** area, define the validity of the message (for example, to promote time-limited special offers) .
   - **On**: Define here until when the message can be delivered to the recipient's device. After this date, the message will no longer be delivered to the end device.

     Example: If you define 2018-03-12 here but the recipient activates his/her end device on 2018-03-13, the message will not be displayed on this recipient's end device.
   - **Non-expiring**: Select this option to deliver this message for an unlimited period.

     On Android devices, the maximum validity period is four weeks .
5. In the **Preview** area, switch between **Android** and **iOS** and **Banner** and **Lockscreen** to display a preview of your message on the respective device.
6. Click Save .

Print[2]

Format and sender address cannot be changed

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As the sender information is permanently stored in the template, it cannot be changed. The format depends on the selected template and cannot be changed retroactively. The **Letter DIN A4**, **Postcard DIN A6** and **Postcard DIN lang** are available when sending via post. You will need a separate template for each of these formats, as the mechanical printing and dispatch are associated with precise layout regulations. A free-text template is not available for the print channel.

To configure a print message for dispatch, perform the following steps:

1. Right at the top of the **Edit content** window, click Sender, dispatch, option, format .
2. From within the **Dispatch option** area, select one of the following dispatch options.
   - **Fast dispatch**: With this type of dispatch, the post-based delivery will usually arrive after two working days if sent before 8 PM (CET). In individual cases (or if the item is sent after 8 PM), the delivery will arrive on the third working day following dispatch.
   - **Cheap dispatch**: This type of dispatch is suitable for printed items that are not particularly urgent, such as promotional letters.

     The delivery usually takes place within six working days after data input. The use is permitted only for purely promotional communications (e.g. direct incitement to buy, offers or aid appeals).
3. Click Apply .

Note about paper quality

Letters are sent using paper types that are in accordance with the standards for automated letter delivery with **Deutsche Post AG**:

- **Letter DIN A4**: Profi silk white, matt-coated 90 gsm, white paper envelope 75 gsm.
- **Postcard DIN A6**: Profi silk white, matt-coated 300 gsm.
- **Postcard DIN lang**: Profi silk white, matt-coated 300 gsm.

[1] This feature is only available in Germany, Austria and Switzerland.
[2] This feature is only available in Germany.

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Step 3 — Layout settings and content

Depending on the selected message type, you can adjust the layout and add different content elements. Proceed as follows:

- Email
- Fax
- SMS
- Push
- Print

Email

You can read more about this in the Edit mailing content chapter. If you are using the Template Kit, you will find detailed information on this in the The Template Kit chapter.

Fax[1]

If you are using a fax template, read our white paper: Episerver Fax. The control elements of a fax template are identical to those of an email template.

SMS

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

Push

With the push feature, you can send pure text messages and trigger predefined actions. For more information, read the **Push** section in the Step 2 — Configure the message chapter.

Print[2]

For technical reasons, you can only insert your content into print mailings using a template. Episerver Campaign provides default templates for the following formats: Letter DIN A4, Postcard DIN A6 and Postcard DIN lang. Some print areas on a letter or postcard have limitations on colors, fonts and background images. More information on editing your content for a print mailing can be found in chapter Edit print message content.

[1] This feature is only available in Germany, Austria and Switzerland.
[2] This feature is only available in Germany.

Marketing automation

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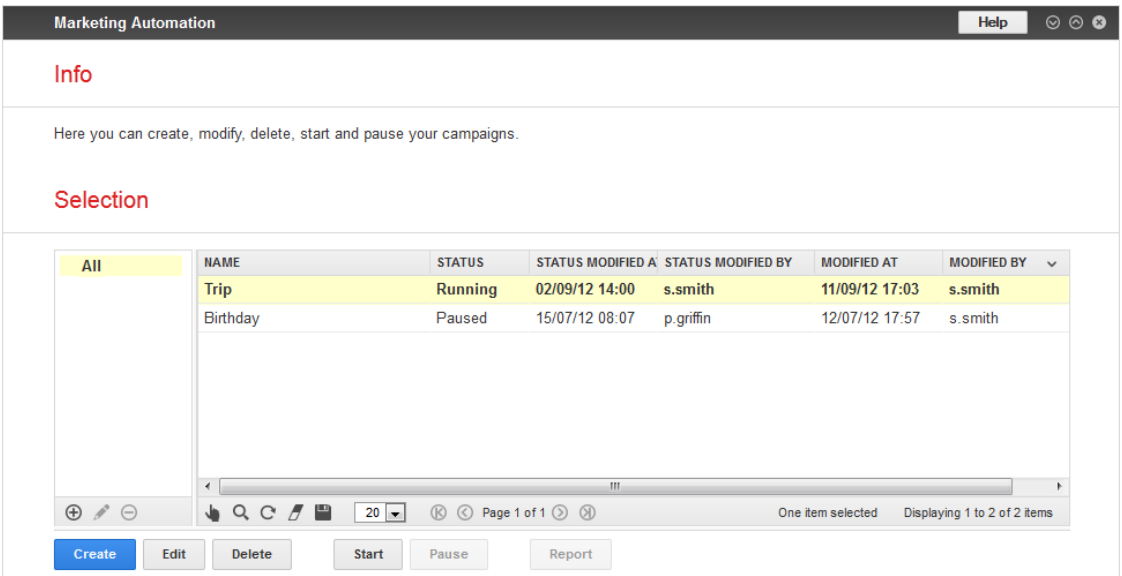

Episerver Campaign provides you with an entirely novel range of options. Get started right away in creating more effective email marketing using graphic interface with drag & drop functions to develop multi-step campaigns with action- and event-based mailings; all of it perfectly adapted to a highly diverse set of target groups using fully automated distribution cycles. From start to finish, the process is practically child's play: Episerver Campaign's new graphic editor lets you create new campaigns quickly and easily. And with just a few clicks of the mouse, you're also able to put together more elaborate campaigns on the basis of your customer database – then refine them once the campaign is up and running. You will have access to the entire platform so you can concentrate on the ad message design.

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

Keeping customers in your sites

Using our marketing automation it's easy to analyze both potential customers and promotions as well as your customer contact histories and incorporate that information into your campaigns. Our innovative approach facilitates customer dialog through a process that allows you to continuously improve and refine your marketing strategy. Information gathered during a campaign can be used to augment a currently existing database. This in turn allows you to more accurately define your segments and then roll out more finely-tuned campaigns.

Examples of campaigns supported by our marketing automation:

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- **Welcome mailings**: Welcome new subscribers through targeted welcome mailings. This is based on a multi-stage campaign aimed at better acquainting potential purchasers with your brand and what it has to offer. First impressions are very important in campaigns of this kind. It's an ideal phase for introducing your line of products and opening a dialog. It also lets you know early on whether an addressee would be interested in any special promotional offers. And the so-called Preference Center (profile self-administration) gives you an opportunity to inquire whether the subscriber prefers to be contacted on a weekly or monthly basis. It may be worthwhile in certain circumstances to include a sweepstakes mailing as part of the series of welcome mailings – to turn an interested consumer into a new customer.
- **Trigger and transactional emails**: Trigger mails – which are campaign mailings relating to an event or special occasion – help nurture existing customer relationships, ensure consistent sales and initiate new customer relationships. Distribution is triggered by a special event relating to the subscriber – with Episerver Campaign automatically sending out trigger mails according to predefined criteria or at a specified point-in-time. In campaigns created with our marketing automation, each node through which mailings are sent is a trigger mail. This provides you with a simple tool for automatically contacting your customers individually under a variety of scenarios. Transactional emails, on the other hand, are emails that are sent out subsequent to an order, a purchase or similar customer action (transactions). Provided you are using post click tracking, you can use our marketing automation to send out transactional emails.
- **Cross and upselling offers**: Product recommendations offer enormous potential. These mailings are prompted by a purchase, a registration or similar action, with contents automatically adapted accordingly. The goal is to encourage follow-up purchases or the purchase of higher-quality and higher-priced goods or to provide a wider variety of purchasing choices. Cross- and upselling recommendations are made available through a database and content interface or via established web-analysis software in Episerver Campaign.
- **Customer care**: Establish an ongoing dialog with your regular customers through a more proactive approach to customer care that goes above and beyond regularly recurring communications. You can measure customer satisfaction, for instance, by means of statistical analyses based on scorings. Ideally, this puts you in a position to predict the likelihood of cancellation on a case-by-case basis. Specially incentivised customer-binding mails are then sent out when certain tolerance limits are exceeded. Concurrently, you can also include targeted customer satisfaction surveys that solicit suggestions on how to improve your services.You should also make sure to keep close track on changes in customer status. If a customer has a change of address, for example, you'll be able to send a mailing with information and promotions precisely tailored to the new location. If you know how old your customer is, you'll want to select mailings with content appropriate to his or her age-bracket. React quickly to the first signs of inactivity by inquiring whether the customer elects to suspend mailings for a time or prefers receiving them less frequently. We are able to provide support with a wide range of other scenarios in the area of customer support. Get in touch with us with any requests you may have.

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- **Reactivation**: Reactivation by email is an important component of effective lifecycle marketing. Successful reactivation depends on the effective monitoring of subscribers. Early detection of sagging interest or excessive contact frequency is an important means for avoiding customer inactivity and, ultimately, customer withdrawal. First define at what point a customer is to be considered inactive. Set a timeframe to indicate when a customer fails to open or click on your emails to determine his or her status. Possible indicators include not only failure to open or click on mails but also a failure to log in to user accounts and communities or user data not being updated. The timeframe you employ will depend on the natural lifespan of your products, services and promotions. Successful re-activations are normally the result of multi-stage campaigns. For example, you may want to request that the addressee update his or her customer information. All those who click on the applicable link will then receive an attractive shopping coupon. And you can incentivise those addressees who did not respond your first email by sending a second one.

Marketing Automation guide

Helpful information, tips and tricks and a lot of examples for successful Marketing Automation campaigns can be found in our Marketing Automation guide.

Marketing Automation packages

The licensing model of Marketing Automation contains three packages. Should a node be grayed out (i. e. deactivated) when creating or editing a campaign or if you cannot add any further node to a campaign, this means that you have not licensed the respective package yet. If you want to upgrade your package, contact customer support.

- Starter package
- Advanced package
- Ultimate package

Starter package

Our starter package contains everything you need to set up the most relevant campaigns using Marketing Automation (for example, welcome message series, birthday mailing, reactivation campaign).

A maximum of 50 start or branching points (nodes) can be in use per client.

Advanced package

In addition to the **Starter** package, the **Advanced** package includes the following services for a client:

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- Up to 250 start or branching points (nodes) can be in use.
- Using the **A/B test** node you can split the recipients in a campaign by percentage and then distribute them to various mailing routes, allowing you to optimize your campaign very easy.
- Using the **Change recipient**, **Copy recipient** and **Move recipient** nodes you can change the recipients' data and copy or move recipients to other recipient lists.

Ultimate package

In addition to the **Advanced** package, the **Ultimate** package includes the following services for a client:

- Any number of start or branching points (nodes) can be in use.
- The **Start in** and **From campaign** nodes are two more powerful nodes with which you can combine multiple campaigns.

Node	Starter	Advanced	Ultimate
Recpient new	✓	✓	✓
Open	✓	✓	✓
Click	✓	✓	✓
Reply	✓	✓	✓
Post click	✓	✓	✓
Advanced	✓	✓	✓
From MA campaign	✘	✘	✓
Wait	✓	✓	✓
Send message	✓	✓	✓
Switch	✓	✓	✓
A/B test	✘	✓	✓
Change recipient	✘	✓	✓
Copy recipient	✘	✓	✓
Move recipient	✘	✓	✓
Start in	✘	✘	✓
Done	✓	✓	✓
Total number of active nodes per client	max. 50	max. 250	unlimited

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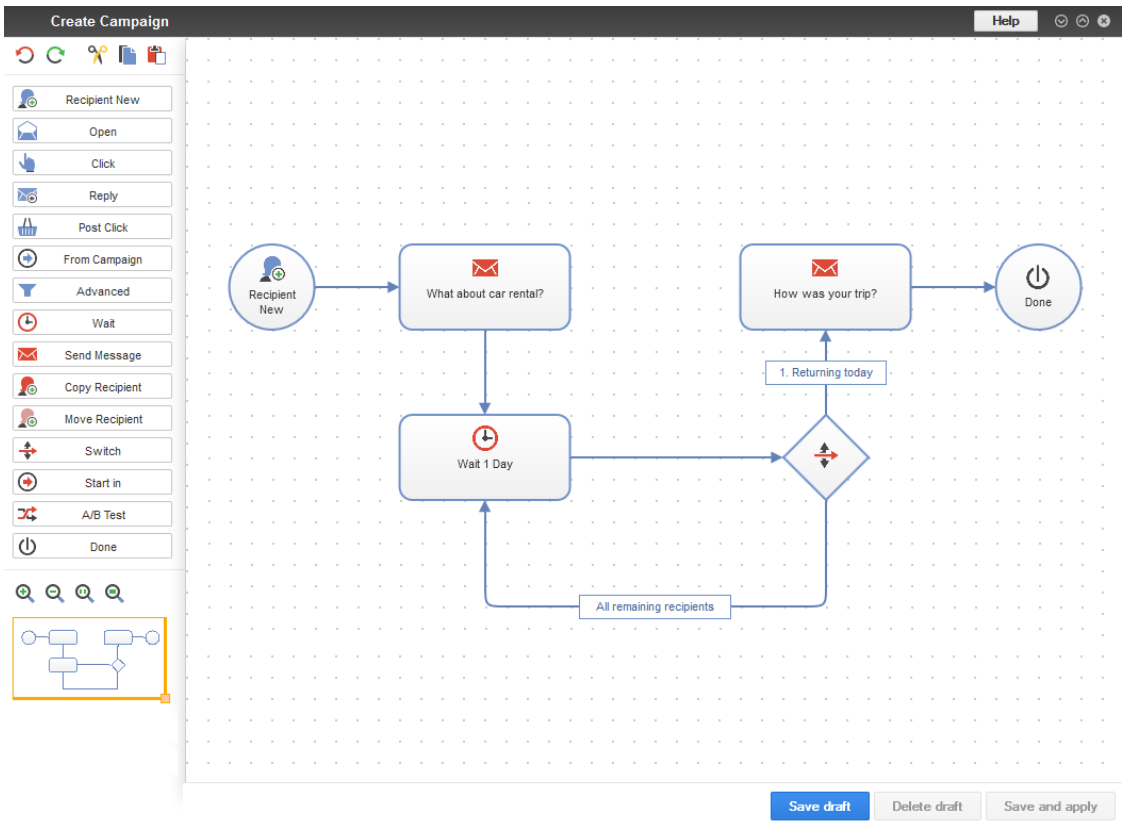
Campaign overview

To manage your Marketing Automation campaigns, open the start menu and in the **Campaigns** menu, click **Marketing Automation**. The **Marketing Automation** window contains an overview of all Marketing Automation campaigns. In the overview, you can manage campaigns: Create new campaigns, edit, delete, start already existing campaigns or pause running campaigns.

Create and edit automated Marketing Automation campaigns



To create a new Marketing Automation campaign, perform the following steps in the Marketing Automation window:

1. Click Create.

✔ The **Create campaign** window opens.

2. Define the process of your campaign by dragging and dropping the nodes from the action area to the working area, connecting them and making the desired settings.

For more information, see Edit nodes and Marketing Automation nodes sections.

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→ 3. Click Save draft, enter a name for the campaign and click Save.

✔ The new Marketing Automation campaign is displayed in the overview.

Marketing Automation does not guarantee that mailings are sent in real time. Therefore, note the following hints on sending messages in the Marketing Automation:

- Use the HTTP API for time-sensitive mailings (for example, order confirmations or password reminders), since mailings in Marketing Automation cannot always be processed in real time.
- Target groups within the same campaign, that check on the dispatch of the message in this node, may give false results because the mailing may not have been sent. If you use such target groups behind the **Send message** node, there may be undesirable effects as the target groups may not work. To avoid this, place a **Wait** node, which delays the execution of the action, in front of such nodes.
- If you place a **Send message** node behind a **Move recipient** node, we also recommend to place a **Wait** node in front of the **Move recipient** node because otherwise it may happen that the recipient of the recipient list is removed before the message is sent.

Start and pause campaign

→ To start a Marketing Automation campaign in the **Marketing Automation** window, select the campaign from the overview, click Start and then confirm the start.

✔ Afterwards, Episerver Campaign validates the content of the campaign. If any errors are found, correct them by editing the campaign.

→ To pause a campaign, select the campaign from the overview in the **Marketing Automation** window, click Pause and then confirm the pause. You can resume the campaign later by clicking Start.

If your Marketing Automation campaign contains a **Wait** action node and you pause the campaign, the time specified in this node is not paused. I.e. if the waiting time of the node elapses during pausing, the next action is executed immediately after the new start of the campaign.

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Edit campaign

To edit a Marketing Automation campaign, perform the following steps in the **Marketing Automation** window:

1. In the overview, select the campaign and click Edit.
2. The **Edit campaign** window opens.
3. Define the process of your campaign by dragging and dropping the nodes from the action area to the working area, connecting them and making the desired settings.

For more information, see Edit nodes and Marketing Automation nodes sections.

4. To save the changes as draft, click Save draft, enter a name for the campaign (only applies to campaigns in the status **New**) and click Save. These changes are not applied to the running or paused campaign.
5. To apply the changes to the running or paused campaign, click Save and apply, enter a name for the campaign and click Save. Paused campaigns remain in the status **Paused**.

If you have already saved a draft of a campaign and want to display the running or paused version of the campaign, open the report of the campaign. For more information, see the section Marketing Automation campaign report.

Delete draft

To restore the version of the running or paused Marketing Automation campaign, in the **Edit campaign** window, click Delete draft and then confirm the deletion.

Deleting a draft will not only revert the current changes but all the changes that have been made since the start of the campaign.
If you want to revert the current changes, close the **Edit campaign** window.

Delete campaign

To delete a Marketing Automation campaign in the **Marketing Automation** window, select the campaign from the overview, click Delete and then confirm the deletion.

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Edit nodes

The components of a Marketing Automation campaign are called nodes. You find all available nodes in the left column of the window. Drag the desired node to the working area, to add it to a campaign. All nodes of a campaign must be connected, there must not be any unconnected nodes. Below the editing options for nodes and connections are explained.

If a node is grayed out (e.g. deactivated), this means that it is not part of your Marketing Automation license. For more information see our note on the Marketing Automation packages. If you wish to upgrade your package, contact customer support.

- Insert
- Connect
- Delete
- Properties

Insert

- You can insert nodes easily and convenient by dragging and dropping them from the action area to the working area.

Connect

- To create a connection, click the node from which you want to create a connection and draw a connection to the target node. You can decide where on the node the connection should be created. Each node has connection points at the right, left, upper and lower side and in the middle of the node. To start the campaign, each node must be connected.

Delete

- To delete a node or a connection, move the cursor over the item and click **Delete** . Alternatively, you can also select the item and press [Del].

Properties

- To edit the properties of a node or a connection, move the cursor over the item and click **Edit** . Alternatively, you can also double click the item.

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Editing tools

To make editing of your campaign as simple and convenient as possible, the windows **Create campaign** and **Edit campaign** contain the following editing buttons.

- **Undo** (Ctrl + Z): Click this button to revoke the last action. Every further click on this button revokes a further action.
- **Redo** (Ctrl + Y): Click this button to restore an action you revoked before. Every further click on this button restores a further action.
- **Cut** (Ctrl + X): Click this button to cut out selected items and temporarily copy them to the clipboard.
- **Copy** (Ctrl + C): Click this button to copy selected items to clipboard.
- **Paste** (Ctrl + V): Click this button to insert elements you previously cut out or copied.

To quickly use the functions of these buttons, you can also use the above mentioned shortcuts (see parentheses).

To make navigating through your campaign as simple and convenient as possible, the windows **Create Campaign** and **Edit Campaign** contain the following navigation tools.

- **Zoom in**: Click this button to zoom in the working area. Each click magnifies the working area to the next zoom level.
- **Zoom out**: Click this button to zoom out the working area. Each click reduces the working area to the next zoom level.
- **Actual size**: Click this button to restore the original view. All zoom settings are reverted.
- **Fit on screen** (Show all): Click this button to display all items that are on the working area.
- **Minimap**: The minimap allows you to quickly and easily navigate through the entire campaign. Just drag the yellow rectangle to the place you want to navigate to. To zoom in or out the working area using the minimap, click and drag the bottom right corner of the yellow rectangle either to the left (zoom in) or to the right (zoom out).

Marketing Automation nodes

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

This section gives you information about all available nodes and what to consider when using them.

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If a node is grayed out (e.g. deactivated), this means that it is not part of your Marketing Automation license. For more information see our note on the Marketing Automation packages. If you wish to upgrade your package, contact customer support.

Start nodes

With the help of start nodes you can define by which event the process of a campaign is initiated for a recipient. The following start nodes are available:

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

Recipient new

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

Parameters	Description and values

Starts the Marketing Automation campaign	Specify which recipients are passing through the campaign
	» **if recipient never passed through this MA campaign**: Using this option, a recipient will pass through the campaign if he/she
	  » was newly added to the recipient list
	  » is not currently passing through the campaign
	  » never passed through the campaign
	» **if recipient is not currently passing through this campaign**: Using this option, a recipient will pass through the campaign if he/she
	  » was newly added to the recipient list
	  » is not currently passing through the campaign
	
	Recipients that already passed through the campaign and that are newly added to the recipient list may pass through the campaign again.

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Parameters	Description and values
	» **always**: Any recipient that is newly added to the recipient list will pass through the campaign.
Start only for recipients in (mandatory)	Only recipients of this recipient list(s) are passing through this campaign. To start the campaign you have to specify a recipient list here.
Start only for	Only recipients of this target group are passing through this campaign.

Open

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

Parameters	Description and values
Starts the Marketing Automation campaign	Specify which recipients are passing through the campaign. » **if recipient never passed through this MA campaign**: Using this option, a recipient will pass through the campaign if he/she » opened the message. » is not currently passing through the campaign. » never passed through the campaign. » **if recipient is not currently passing through this MA campaign**: Using this option, a recipient will pass through the campaign if he/she » opened the message. » is not currently passing through the campaign. Recipients that already passed through the campaign and that open the message again may pass through the campaign again. » **always**: Any recipient that opened the message will pass through the campaign.
Mailings	Specify which mailings the recipients must open to pass through the campaign. You can specify a mailing or limit the mailing selection to a mailing type, a folder which contains the mailings or to a date on which a mailing was sent.

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

Click

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

Parameters	Description and values
Starts the Marketing Automation campaign	Specify which recipients are passing through the campaign. » **if recipient never passed through this MA campaign**: Using this option, a recipient will pass through the campaign if he/she » clicked a link in the message. » is not currently passing through the campaign. » never passed through the campaign. » **if recipient is not currently passing through this MA campaign**: Using this option, a recipient will pass through the campaign if he/she » clicked a link in the message. » is not currently passing through the campaign. Recipients that already passed through the campaign and that click a link in the message again may pass through the campaign again. » **always**: Any recipient that clicked a link in the message will pass through the campaign.
Mailings	Specify in which mailings the recipients must click a link. You can specify a mailing or limit the mailing selection to a mailing type, a folder which contains the mailings or to a date on which a mailing was sent.
Links	Specify the links the recipients must click to pass through the campaign.
Click profile	Specify the click profiles whose links the recipients must click to pass through the campaign.
Start only for	Only recipients of this target group are passing through this campaign.

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Reply

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

Parameters	Description and values
Starts the Marketing Automation campaign	Specify which recipients are passing through the campaign. » **if recipient never passed through this MA campaign**: Using this option, a recipient will pass through the campaign if he/she » replied to the message or created a bounce. » is not currently passing through the campaign. » never passed through the campaign. » **if recipient is not currently passing through this MA campaign**: Using this option, a recipient will pass through the campaign if he/she » replied to the message or created a bounce. » is not currently passing through the campaign. Recipients that already passed through the campaign and that reply to the message or create a bounce again may pass through the campaign again. » **always**: Any recipient that replied to the message or created a bounce will pass through the campaign.
Mailings	Specify to which mailings the recipients must reply or create a bounce to pass through the campaign. You can specify a mailing or limit the mailing selection to a mailing type, a folder which contains the mailings or to a date on which a mailing was sent.
Type	Select one ore more response categories of the reply.
Start only for	Only recipients of this target group are passing through this campaign.
Minimum interval	Select an interval that checks whether the recipient already passed this campaign (triggered by this start node). If the recipient has already passed through the campaign since the last check, the recipient will not pass through the campaign until the next check.

Post click

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

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Parameters	Description and values
Starts the Marketing Automation campaign	Specify which recipients are passing through the campaign. » **if recipient never passed through this MA campaign**: Using this option, a recipient will pass through the campaign if he/she » created a post click. » is not currently passing through the campaign. » never passed through the campaign. » **if recipient is not currently passing through this MA campaign**: Using this option, a recipient will pass through the campaign if he/she » created a post click. » is not currently passing through the campaign. Recipients that already passed through the campaign and that create a post click again may pass through the campaign again. » **always**: Any recipient that created a post click will pass through the campaign.
Mailings	Specify in which mailings the recipients must create a post click to pass through the campaign. You can specify a mailing or limit the mailing selection to a mailing type, a folder which contains the mailings or to a date on which a mailing was sent.
Post click	Select the post click service. This is either the proprietary post click tracking or the web analytics software you are using.
Start only for	Only recipients of this target group are passing through this campaign.
Include imported post clicks without recipient list	Select this check box if you want to evaluate imported post clicks the recipients of which cannot be assigned to any recipient list in Episerver Campaign. This is, for example, the case when post clicks are imported from external sources or the recipient is logged in the online shop at the time of the post click, but has not yet registered for the newsletter. This setting does not apply to post clicks that can be uniquely allocated to recipients in existing recipient lists. With such post clicks, in which the email address is known, Episerver Campaign checks whether this corresponds to a recipient in the replacement recipient list. Select the replacement recipient list in the next step. If the email address is found in this recipient list, this recipient is considered in the further course of the marketing automation campaign and can receive messages (provided that all other conditions are met).
Select replacement	Select the recipient list here to which the recipients of the imported post clicks are compared. Post clicks that could not be assigned to a recipient from any existing

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Parameters	Description and values
recipient list	recipient list at the time of their capture (see the previous parameter) are compared to this recipient list and are assigned with the matching email addresses. Imported post clicks that cannot be assigned to any recipient of this list are discarded. We recommend that you create a **Standard** recipient list that contains all the registered recipients and select this recipient list here. As a result, there is a high possibility that a post click can be assigned to a recipient.

From MA campaign

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

Parameters	Description and values
Starts the Marketing Automation campaign	Specify which recipients are passing through the campaign. » **if recipient never passed through this MA campaign**: Using this option, a recipient will pass through the campaign if he/she » comes from another campaign. » is not currently passing through the campaign. » never passed through the campaign. » **if recipient is not currently passing through this MA campaign**: Using this option, a recipient will pass through the campaign if he/she » comes from another campaign. » is not currently passing through the campaign. Recipients that already passed through the campaign and that come from another campaign again may pass through the campaign again. » **always**: Any recipient that comes from another campaign will pass through the campaign.
Start only for	Only recipients of this target group are passing through this campaign.

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Advanced

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

Parameters	Description and values
Starts the Marketing Automation campaign	Specify which recipients are passing through the campaign. » **if recipient never passed through this MA campaign**: Using this option, a recipient will pass through the campaign if he/she » matches the criteria of this node. » is not currently passing through the campaign. » never passed through the campaign. » **if recipient is not currently passing through this MA campaign**: Using this option, a recipient will pass through the campaign if he/she » matches the criteria of this node. » is not currently passing through the campaign. Recipients that already passed through the campaign and that matches the criteria of this node again may pass through the campaign again. » **always**: Any recipient that matches the criteria of this node will pass through the campaign.
Start only for recipients in (mandatory)	Only recipients of this recipient list(s) are passing through this campaign. To start the campaign you have to specify a recipient list here.
Interval	Specify how often the criteria should be checked. Episerver Campaign then checks at the specified time which recipients meet the criteria—these recipients then pass through the campaign.
Start only for (mandatory)	Only recipients of this target group are passing through this campaign. To start the campaign you have to specify a target group here.

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Parameters	Description and values
	Because the examination of the criteria may take some time to complete, it is possible that the following actions are performed delayed.

Action nodes

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

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

Wait

During this time no action is taken.

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

Send message

Sends a message to the recipient.

Due to performance reasons, messages are sent asynchronously to the course of the

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recipient in the campaign. Therefore, note the following hints on sending messages in the Marketing Automation.

- Target groups within the same campaign, that check on the dispatch of the message in this node, may give false results because the mailing may not have been sent. If you use such target groups behind the **Send message** node, there may be undesirable effects as the target groups may not work. To avoid this, place a **Wait** node, which delays the execution of the action, in front of such nodes.
- If you place a **Send message** node behind a **Move recipient** node, we also recommend to place a **Wait** node in front of the **Move recipient** node because otherwise it may happen that the recipient of the recipient list is removed before the message is sent.

Parameters	Description and values
Mailing	Select the message to be sent to the recipient. Messages that you link here need to be created beforehand. There are two functions available for this purpose: » If you are working with Mailings Classic: Open the start menu and in the **Campaigns** menu, click **Mailings Classic**, and create a mailing of the type **Special/API**. » If you are working with Smart Campaigns: Open the start menu and in the **Campaigns** menu, click **Transactional emails**, and create a new message.
Send only to	A message will be sent only to recipients of this target group. All remaining recipients skip this action.

Switch

Allows the branching of the campaign based on specific target groups. The branches are processed hierarchically. The branch with the lowest number has the highest priority and is executed first.

Parameters	Description and values
Target group	Create a connection to the node whose action has to be executed for a specific target group and specify this target group. You can connect any number of nodes using different target groups.

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Parameters	Description and values
	If a recipient matches a target group, the corresponding action is executed. Episerver Campaign does not further check whether the recipient matches another target group.
All remaining recipients	Create a connection to the node whose action has to be executed for all remaining recipients.

A/B test

Allows the branching of the campaign based on predefined probabilities.

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

Change recipient

Changes a recipient's data. To use this node, you need the corresponding user right that allows you to evaluate action-based data at user level.

Parameters	Description and values
Recipient list	Select the recipient list in which you want to change recipient data.
Changes	Specify the changes that have to be made. 1. In the first list, select a recipient list field. 2. In the second list, select the action that has to be performed. » **set value to**: Replace the current value with a new value. » **append suffix**: Append a value to the existing value. » **prepend prefix**: Prepend a value to the existing value. » **toggle**: Toggle between the current and the counter value.

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

Copy recipient

Copies the recipient into another recipient list. To use this node, you need the corresponding user right that allows you to evaluate action-based data at user level.

Parameters	Description and values
Copy to (mandatory)	Select the recipient list the recipient has to be copied to.
Overwrite existing recipient	Select this check box to overwrite the recipient in the target recipient list (if the recipient is already contained in this recipient list).
Copy only	Only recipients of this target group are copied to the recipient list. All remaining recipients skip this action.

Move recipient

Moves the recipient into another recipient list. To use this node, you need the corresponding user right that allows you to evaluate action-based data at user level.

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Moving a recipient into another recipient list deletes any double opt-in data of this recipient.

Parameters	Description and values
Move to (mandatory)	Select the recipient list the recipient has to be moved to.
Overwrite existing recipient	Select this check box to overwrite the recipient in the target recipient list (if the recipient is already contained in this recipient list).
Move only	Only recipients of this target group are moved to the recipient list. All remaining recipients skip this action.

Start in

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

Parameters	Description and values
Campaign (mandatory)	Select the campaign the recipient has to pass through.
Beforehand copy to	Optionally select whether the recipient has to be copied into another recipient list before he passes through the campaign.
Overwrite existing recipient	Select this check box to overwrite the recipient in the target recipient list (if the recipient is already contained in this recipient list).
Perform action only for	Only recipients of this target group are passing through the other campaign. All remaining recipients skip this action.

Limit

Limits the number of recipients for a message per day, week, or month. Once the recipient limit has been reached, no further messages will be sent. This node is particularly useful for print messages to keep postage costs within a set budget.

Parameters	Description and values
Recipients	Enter the maximum number of recipients to whom the message should be sent...

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Parameters	Description and values
(required)	
...per day	Select this option to set a daily limit (calendar day from 00.00 to 23.59h).
...per week	Select this option to set a weekly limit (calendar week from Monday to Sunday).
...per month	Select this option to set a monthly limit (calendar month from the 1st to the last day of the month).

All times and dates are based on the Campaign system time (Berlin, CET). When you set your client to a different time zone, mailing limits can be affected.

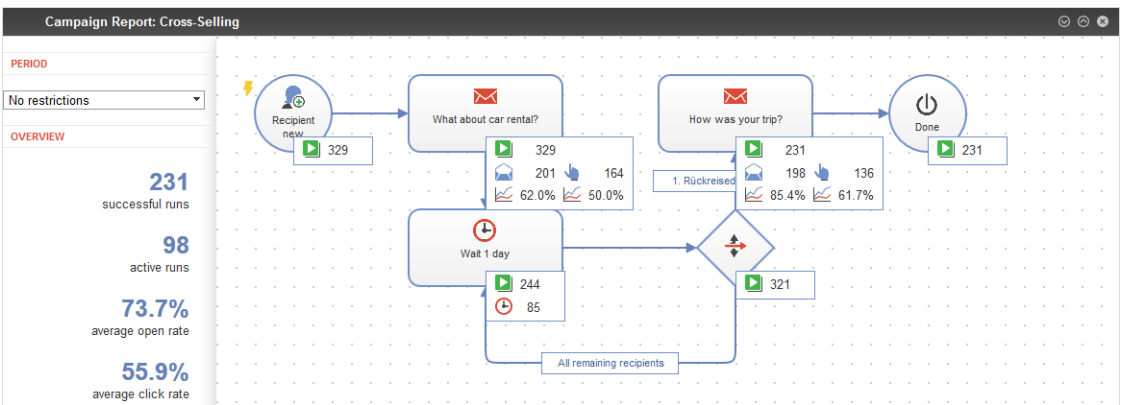
Example

You set your client to New York time (GMT -4) and limit the dispatch to 100 mailings per calendar day. At 5.59 PM (local time), 100 mailings are sent out. The daily limit would have been reached at this point, however, 100 additional mailings are sent at 6.01 PM. The reason: In Berlin (6 hours ahead of the New York time zone) it is 11.59 PM. when the first 100 mailings are sent out and 12.01 PM when the second batch of 100 mailings is sent. Therefore, based on the Campaign system time, a new calendar day has started.

Done

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

Marketing Automation campaign report



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The Marketing Automation campaign report offers you the opportunity to evaluate the success of your campaign. The report shows you the number of successful, current/active and failed runs of the campaign.

The report also provides this information for each node of the campaign. Additionally, the openings, clicks, and the corresponding rates are displayed for the **Message** action node and the currently waiting recipients are displayed for the **Wait** action node.

To display the Marketing Automation campaign report, click a running or paused campaign in the Marketing Automation window and then click Report .

If a recipient did not receive the message of **Send Message** action node (for example, because he/she is blacklisted or created a bounce) then this will also be displayed as an error for the node.

Marketing Automation guide

Episerver Campaign provides you with an entirely novel range of options. Get started right away in creating more effective email marketing using graphic interface with drag & drop functions to develop multi-step campaigns with action- and event-based mailings – all of it perfectly adapted to a highly diverse set of target groups using fully automated distribution cycles. From start to finish, the process is practically child's play: Episerver Campaign's new graphic editor lets you create new campaigns quickly and easily. And with just a few clicks of the mouse, you're also able to put together more elaborate campaigns on the basis of your customer database – then refine them once the campaign is up and running. You'll have access to the entire platform so you can concentrate on the ad message design. This guide provides you with examples drawn from actual practice, which you can use as is or with just a few adjustments.

Marketing Automation — Your benefits:

- Lifecycle marketing made easy via drag & drop
- Sustainable, automated cultivation of customer relations
- Maximum flexibility in the campaign design
- Higher revenues through automated cross and upselling campaigns
- Optimal visibility and precise timing even if there are plenty of parallel campaigns
- Precisely focused on the individual recipient and simple content filtering options
- Practical real-time analyses by overlay

What is lifecycle marketing?

The idea at the heart of lifecycle marketing is that email content should be oriented toward the interests and personal circumstances of the recipient. Each customer relationship is shaped by the fact that

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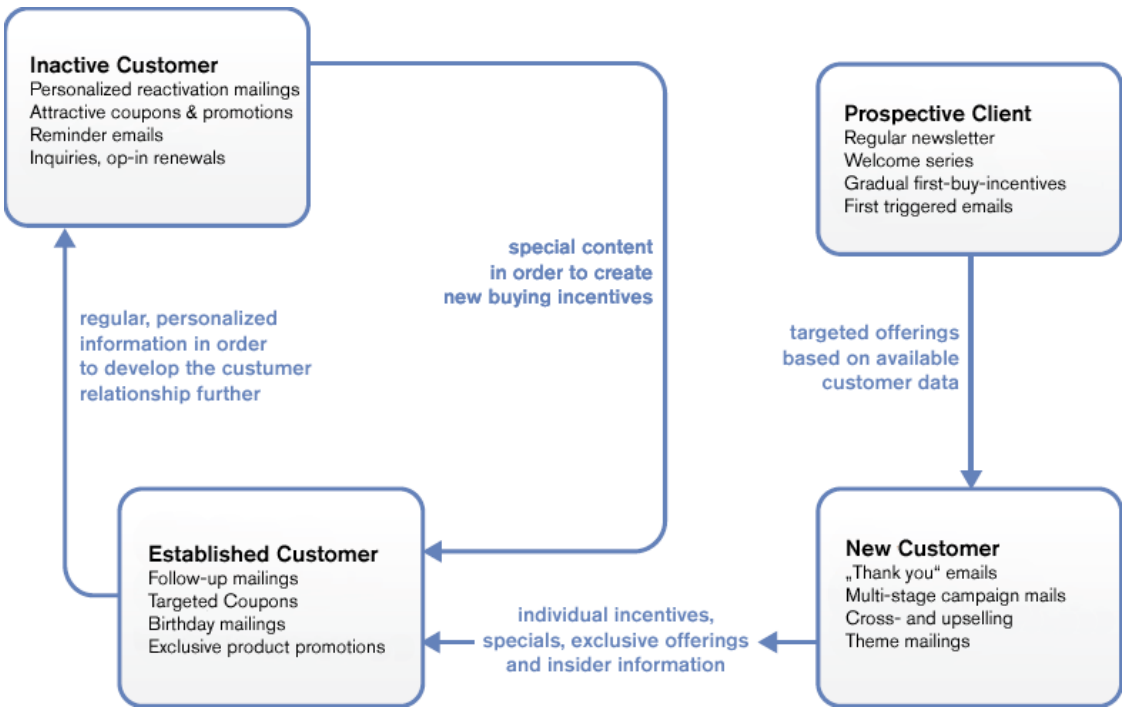
communications with the customer pass through a series of different phases, each one of which is characterized by changing expectations. Broadly speaking, these phases can be divided into the segments **new customer**, **regular customer**, and **inactive customer**.

At the outset of its relationship with a customer, a company faces the challenge of drawing potentially interested consumers to the company's brand and choice of products. The task is to progressively transform this first-blush of general interest into a willingness to purchase, supported by appropriately targeted inducements. Once an interested consumer becomes a customer or long-term regular customer, the challenge is then to periodically provide new impulses through well-defined and properly-dosed emails. Through the application of an ever expanding database and the right analysis strategy you are able to obtain an increasingly better picture of your customer. Development of customer relationships calls for targeted measures such as periodic incentives or post-profiling. And by winning back inactive customers, the lifecycle marketing strategy is complete.



The challenge of conceptualization

All measures undertaken as part of the lifecycle marketing are directed toward the cultivation of so-called "customer lifetime value". The main challenge here is to mold customer lifetime value into a viable concept that benefits your company and its products – and to create a series of automated mailings for a whole host of events and target groups. The main goal here is not simply to use a stand-alone campaign to generate increased short-term revenue but rather to find a profitable means of addressing a variety of customer scenarios over the long term.

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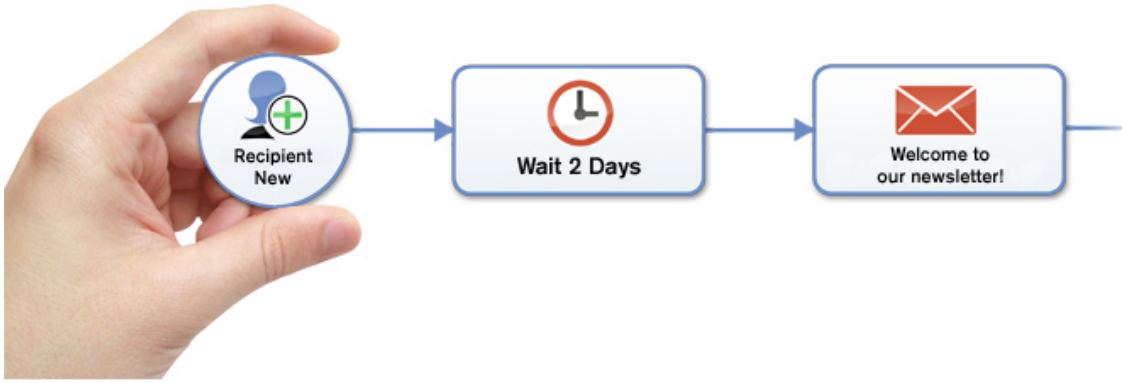

An automated reactivation campaign, for instance, is almost always preferable to a one-time effort at winning back regular but currently inactive customers. It creates the conditions necessary to systematically solicit this customer group over an extended period of time. This approach also helps ensure that no customer “falls through the cracks,” thereby preserving customer value. Thanks to its conceptual design and automated processes, marketing managers are able to devote considerably more time to the contents of their promotions and to the continued development of their campaigns.

Customer lifetime value (CLV)

Customer lifetime value is the profit contribution that a customer realizes during his "lifetime" as a customer. In addition to past revenue, it also takes into consideration anticipated future revenue and customer potential. CLV thus goes beyond conventional campaign performance measurements. Moreover, this indicator includes customer sales trends, allowing for targeted email marketing aimed at generating appropriate purchasing inducements.

Our solution: Marketing Automation for every need

With Episerver Campaign, we have expanded marketing automation to include a broad pallet of new options. Planning and executing automated campaigns is now easier than ever. As in the past, these new functionalities are incorporated into the Episerver Campaign interface. You’ll save valuable time thanks to the intuitive drag & drop functions available in the campaign editor.

This latest generation in lifecycle marketing offers benefits heretofore unavailable. While conventional approaches are capable of supporting only a few standard segments and customer lifetime phases, Episerver Campaign offers a great deal more. Through our marketing automation, you can make more effective use of your customer data and are able to customize implementation to accord with any number of specific requirements. Episerver Campaign allows you to lay out and implement as many campaigns as you want, all at the same time. And you can decide whether you want to display an entire customer lifetime cycle in a central campaign or whether you prefer to roll out several individual campaigns.

Apropos customer care

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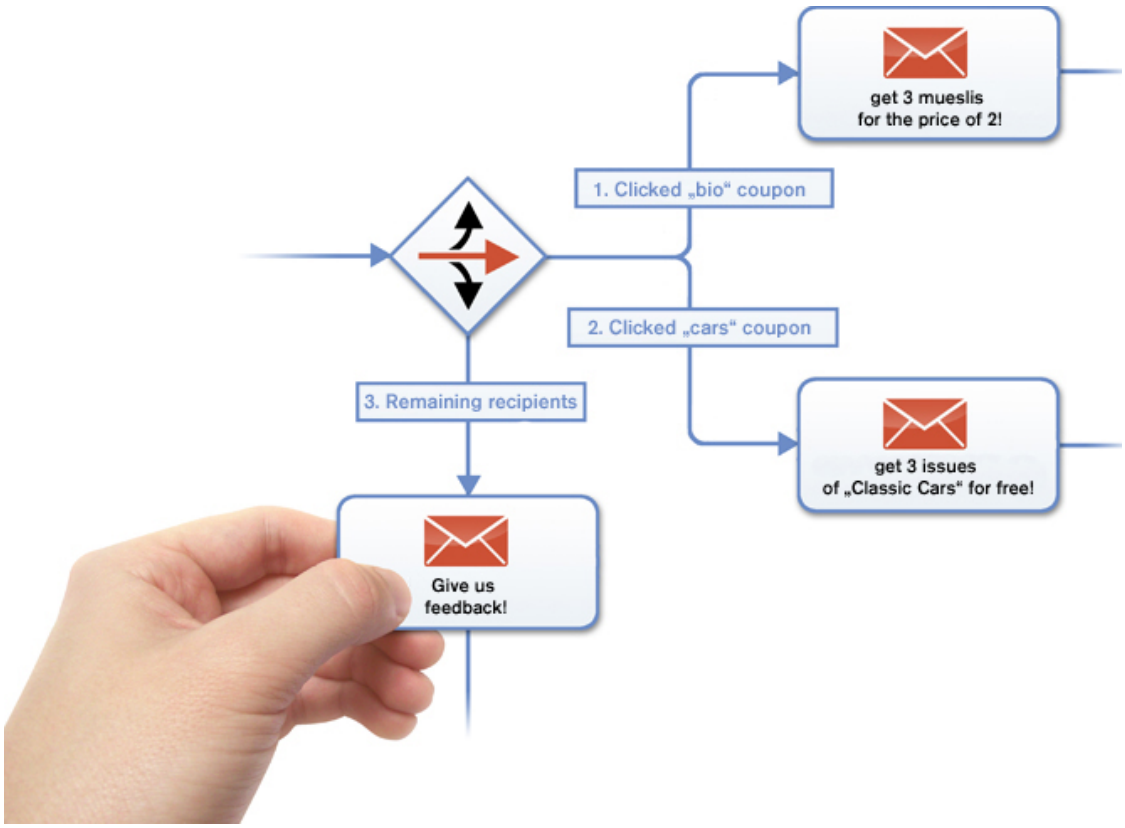
Maintaining relationships with customers is significantly more complex than winning over new customers. Customer care in lifecycle marketing means consistently addressing the customer in a manner appropriate to their status and interests. A contact strategy should, therefore, be evolutionary, methodical and forward-looking. Prompts and incentives should be directed toward obtaining desired responses and targeted feedback and not simply in supplying the customer with information from the company's perspective. That's why effective marketing automation makes the ideal tool for automating and constantly improving customer care. Successful campaigns produce markedly higher customer satisfaction and provide for targeted responses to the needs of regular customers.



From concept straight to the campaign

With the help of graphic tools, our new, user-friendly interface lets you immediately turn an idea into an actual campaign. There's no need to deal with complex technical terminology. You simply use your mouse to mark a starting and ending point on the desktop. Then, with the aid of nodes and branches, you simply retrieve your customary parameters in Episerver Campaign and incorporate them into each campaign.

Each node stands for an action or event – sending birthday email as trigger-mail, for example, or for filtering addressees by target group. By linking two nodes you create a sequencing plan that's easy for anybody to follow. You can assign whatever parameters you like to any node, like click profiles, target

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groups or individual mailings. The campaign editor checks automatically whether all the nodes are linked together logically and that no nodes lead to dead ends.

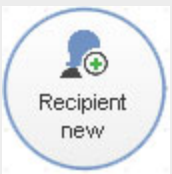
Partial or intermediate steps for specific addressee groups can be added without any trouble. If, for instance, you want to communicate with only those addressees who opened their discount mailing three weeks earlier, you need merely select the appropriate target group as parameter. All other addressees in your distribution list remain unaffected but may be taken into consideration as part of a different discount mailing. Once you have gotten to know you customers better through additional campaigns and analyses, you can then lay out additional segments and reconfigure the way you communicate benefits.

Optimize your running campaigns

Often your first campaign isn't the big hit you hoped it would be. What's important, however, is developing the perfect campaign over time. Our marketing automation operates with exactly that in mind. After launching your campaign, you can modify and refine it at any time. This gives you greater flexibility to properly align the results of your labors with your overall marketing goals while gradually and effortlessly moving toward perfection. You can save any modifications you make as drafts and then transfer them into a running campaign whenever you like. In this way, you're able to develop and modify your campaign in relation to current needs – without incurring any inconvenient downtime.

Campaign building blocks

Implementing a new or existing concept through marketing automation could not be easier using the intuitive drag & drop function and modular graphic interface:

	**Start node** Each campaign starts at the start node. This is where you define which action or event is triggered by the campaign. For instance, it may be the registration, a click on a link or a post click. Recurring events, such as an addressee's birthday, may also be defined the same way. Starting Nodes use blue icons.
	Requirements You can set each campaign so that it runs only once or several times. In addition, you can also specify that an addressee cycles through a campaign only once at any given time.

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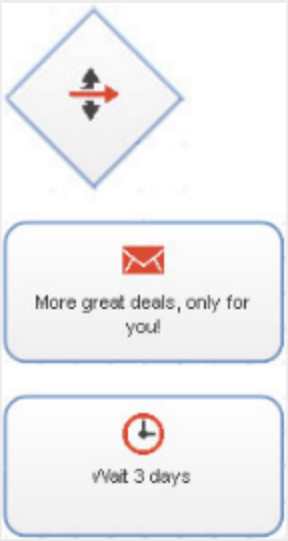

Action nodes

Once a campaign has been initiated, it may contain any number of special sale offers. Each special offer node stands for a single special offer. You can send out mailings, segment target groups or simply set it to wait. If a special offer node is allocated to a particular target group, then the offer will only go to the addressees in that group; all other addressees skip over this node and continue with the next node (assuming the latter node has not also been assigned to a specific target group the addressee is not part of).

Loop

Campaigns may contain loops that an addressee cycles through several times until a criteria set for that loop either applies or no longer applies. The built-in campaign validation function evaluates whether an endless loop has been inadvertently included in the campaign and prevents that campaign from being initiated.

Anniversaries

Give your customers a little extra attention by marking important anniversaries with a special mailing – on their birthday or any other special occasion. Perhaps you may want to consider sending your customers a congratulatory email on the one-year anniversary of their having signed up for your newsletter – and maybe include a shopping coupon along with it. Original approaches like this can have a big effect and give the customer a pleasant surprise, since hardly anyone is likely to recall exactly when they signed up for a newsletter. It's easy for the marketer to do, since the recipient's registration date is already on file—so it requires no additional data enhancement.

And if you know the recipient's date of birth, then it's easy to send congratulations on that day as well. Generally, this sort of information is not required. But by using an optional field in the sign-up form, you can enhance your database by storing dates of birth in a recipient list field. A novel alternative, for instance, might be to send a mail on the one-year anniversary of the recipient having signed up for a newsletter. If you request the recipient's date of birth (e.g. 12.08.1975), you will set up a target group formatted as **recipient list field: birthday: is anniversary**.

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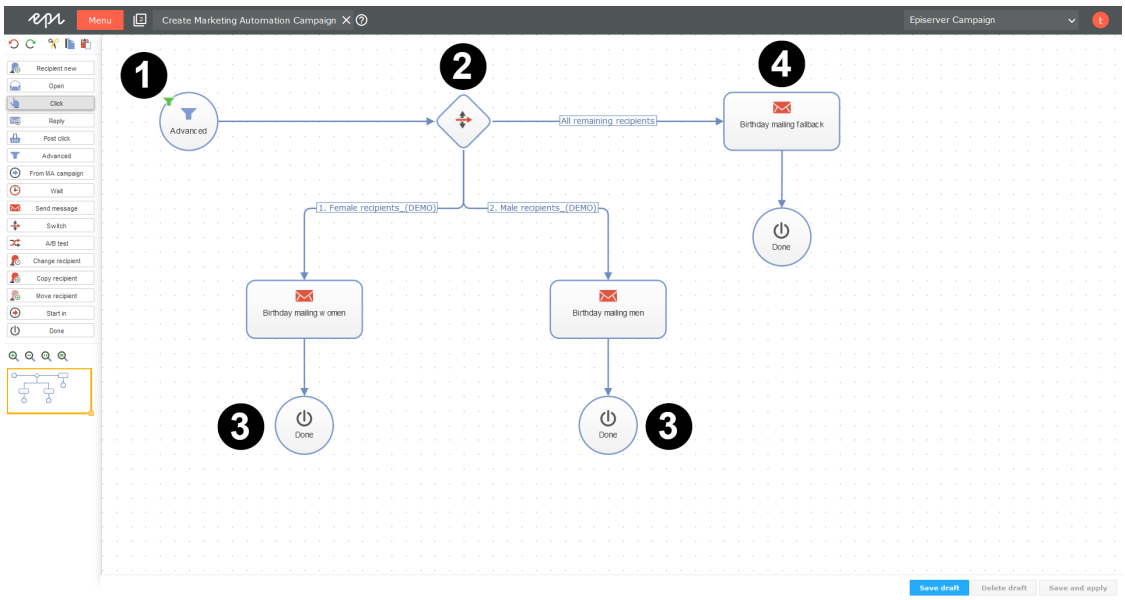
You may wish to include a personalized image and a coupon in birthday mailings. Two mailings are created, one with an image for men, the other for women. An additional mailing containing a neutral image may be necessary as well, in the event the recipient's gender is unknown.



Guidelines for creating birthday mailings:

1. The **Advanced** node is used as the starting node. Using this node allows target groups to be queried at set intervals. With birthday mailings, a target group should be screened daily for **has birthday**, culling those recipients to whom this applies.
2. Next a branch node is set to sort recipients by sex.
3. Each group receives the appropriate birthday mailing.
4. All other recipients, meaning those whose sex is unknown, receive the third mailing (fallback).

You may set up an anniversary campaign in the same manner. Simply change the target group accordingly to **has anniversary**.

After-sales recommendations

Customers who have made previous purchases can be prompted to order other products through the timely distribution of after-sales recommendations. For our example we have chosen all customers of an online drugstore who purchased sunscreen the previous year. There's also a natural link to our other campaign example from the travel industry, of course. We want to send a message to those customers whose last purchase was more than 10 months ago reminding them of the expiration date that applies to sunscreen and to suggest that they obtain a fresh supply.

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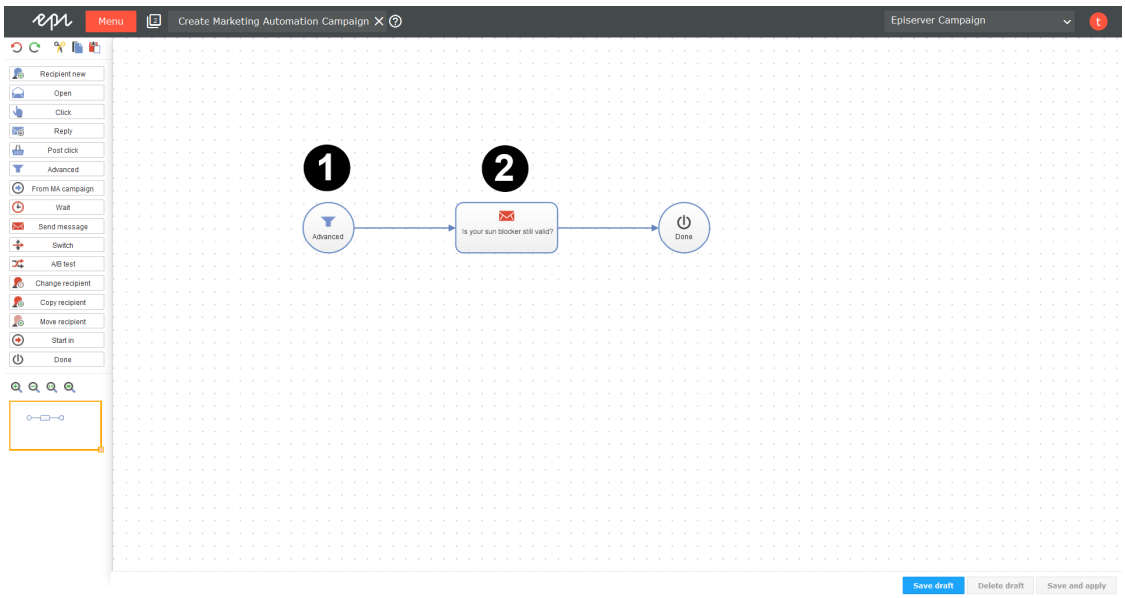
For this campaign, we first incorporate post click tracking in the drug store's online shop. This will provide information about when a customer purchased a product in the category "sunscreen".

A target group will be set up for this campaign with the following filter:

recipient purchased a product in the category sunscreen exactly 300 days ago

This will in turn require a mailing containing a notification about the expiration date, product recommendations and a coupon for use with a purchase of sunscreen. This mailing is called "Has your sunscreen expired? – Buy now and save!".

This campaign is easy to set up:



Guidelines for creating an after-sales recommendation for "Sunscreen":

1. Since this campaign responds with a time delay rather than directly to a transaction, an **Advanced** start node is required rather than a **Post click** node. The parameter for the node will be the previously specified target group. The campaign will be started on a daily basis.
2. Those recipients filtered by this node receive the mailing that was created previously.

Reactivation campaigns

Along with taking care of active customers, it's also important not to overlook the potential represented in those customers who haven't responded to your promotions in a while. Reactivating inactive customers offers multiple means for increasing revenue while also maintaining and cultivating your customer master list. A reactivation campaign should investigate the causes of inactivity, offer incentives to become an active customer again as well as provide an opportunity for those interested to request your newsletter. An recipient who does not respond, that is to say, one who does not renew his opt-in, is preferable to a recipient who remains inactive. You may also wish to consider offering inactive

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recipients the option of receiving your newsletter at greater intervals (e.g. monthly rather than weekly) or to suspend receipt for a time.

A reactivation campaign should take all these factors into consideration and also be multi-stage in nature, providing flexible responses that accord with customer reactions. The point at which an recipient is considered inactive varies depending on the product being advertised in the newsletter. With the travel agency we've been using as an example, we would presume a 12 month purchasing cycle. In other words, we would expect an recipient to make large-scale travel plans once a year and, therefore, that he or she would seek suitable offers accordingly. For other business sectors the cycle may be considerably shorter.

Target groups

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

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

  OR

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

Mailings

Since we're planning a multistage campaign, several mailings will be necessary:

- "Haven't heard from you in a while" – this mailing should contain the latest travel offers.
- "How can we serve you better?" – this mailing should request that the recipient update his or her user information.
- "Receive our newsletter once a month" – allows recipients to switch from receiving a newsletter on a monthly rather than weekly basis. Another button is labeled "Suspend newsletter for 6 months". Both buttons are linked to a landing page that confirms the change. A preference center can also be configured with the same features.
- "A coupon for you" – those recipients who clicked on an item during the first reactivation campaign receive a coupon.
- "Thanks for your feedback!" – all recipients who click on the link to the preference center will receive this mailing.
- "Please confirm your subscription" – lastly, all recipients who did not respond to any of the previous mailings should be prompted to renew their opt-in. This mailing should therefore include an opt-in link.

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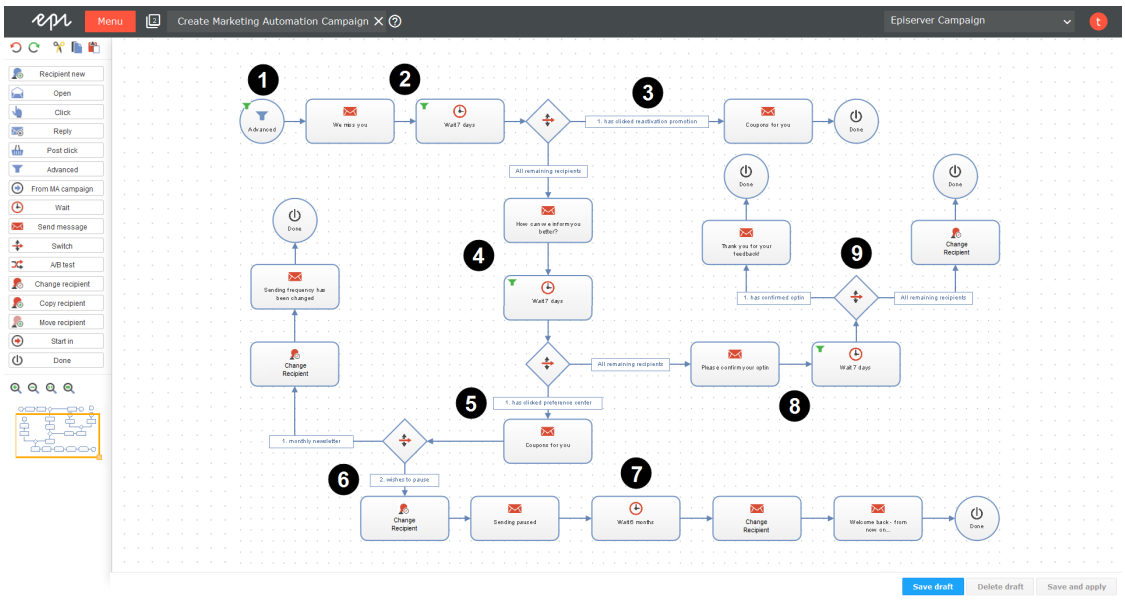
Mailings used in conjunction with marketing automation must be set up as **Special/API** mailings and be in **Send** status.



Guidelines for setting up a reactivation campaign:

1. This type of campaign begins at the **Advanced** node. This node type inquires once a week whether an recipient is in the **Inactive recipient** target group. In the node itself, select the qualifier **Addressee has never cycled through the campaign** since each recipient should cycle through the campaign only once.
2. In the next step, the mailing "Haven't heard from you in a while" is sent out, then wait 7 days. The **Wait** node is assigned the target group **has not responded to 1st reactivation** so that recipients who click on that mailing are immediately directed to the next node.
3. All recipients who click on an offer in the mailing "Haven't heard from you in a while" receive a coupon for other compatible offers. The reactivation campaign is then at an end for these recipients.
4. All recipients who did not respond to the first reactivation campaign (neither opened nor clicked) receive the second reactivation campaign, "How can we serve you better?," then wait another 7 days. The **Wait** node is assigned to the **has not responded to the 2nd reactivation** target group so that recipients who click on the preference center link in this mailing are immediately directed to the next node.
5. Addressees who clicked on the link to the preference center contained in the second reactivation mailing also receive a coupon for offers suitable to their selected preferences.

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6. In the following step, these recipients' preferences will be modified in accordance with their selection: For all those recipients who clicked on the link "Receive newsletter monthly", the **frequency** recipient list field will be set to the **monthly** value. A confirmation mail is then sent out regarding the change to mailing frequency.
7. For those recipients who clicked on the "suspend delivery for 6 months" link, the **suspend** recipient list field will be set to `true`. After that insert a **Wait** node with a value of 6 months. Then the **suspend** recipient list field is reset to `false` and a "Welcome back" message is sent to the recipient.
8. All other recipients who have not responded to a reactivation mailing will receive the "Please confirm your subscription" mailing. Here, too, a **Wait** node is inserted with a waiting period set to 7 days. The **Wait** node is associated with a target group **has not responded to 3rd reactivation** so that recipients who confirm their opt-in are immediately directed to the next node.
9. Recipients who click on the opt-in link also receive a "Thank you for your feedback" mailing, along with a coupon. All other recipients are marked as unsubscribed.

Welcome message series

A series of welcome emails can be a big help in developing customer value. Multistage campaigns help new subscribers become better acquainted with the products and services you provide. And in the process you can make use of the fact that recipients tend to be particularly receptive to receiving a newsletter immediately after registration. This series of emails should comprise greetings and welcome messages as well as follow-up emails with relevant content. Of central importance here is a sustained persuasive effort in the form of individual premium offers.

As our example we'll use a travel service's online portal. The goal here is to establish trust on the part of the recipients and to learn more about their specific interests. To this end, we need to begin by laying out suitable mailings, click profiles, target groups and coupons that are to be used in our campaign.

The initial mailing is a welcome mail without any promotional content but containing an overview of the products and services available through the portal, including test/user ratings as well as short statements from other rating portals that the recipient can view at his or her leisure to get a better idea of what the portal offers. This mailing might be called "Welcome to Travel Deluxe".

A second mailing, to be sent out two days after the "Welcome to" mail, will include, first, an incentive in the form of a coupon and, second, additional information about travel preferences. In this way it's possible to offer several coupons, each coupled with a different travel destination.

In addition, click profiles are created for the individual secondary links that serve to divide the offer into three categories: "Hiking & Nature","All inclusive" and "Culture". All of this is placed under a mailing named "Our Gift to You". A second mailing, sent out two days after the "Welcome to" mail, should contain, first, an incentive in the form of a coupon, and, second, additional information about travel preferences. In this way it's possible to offer several coupons, each coupled with a different travel destination. In addition, click profiles are created for the individual secondary links that serve to divide

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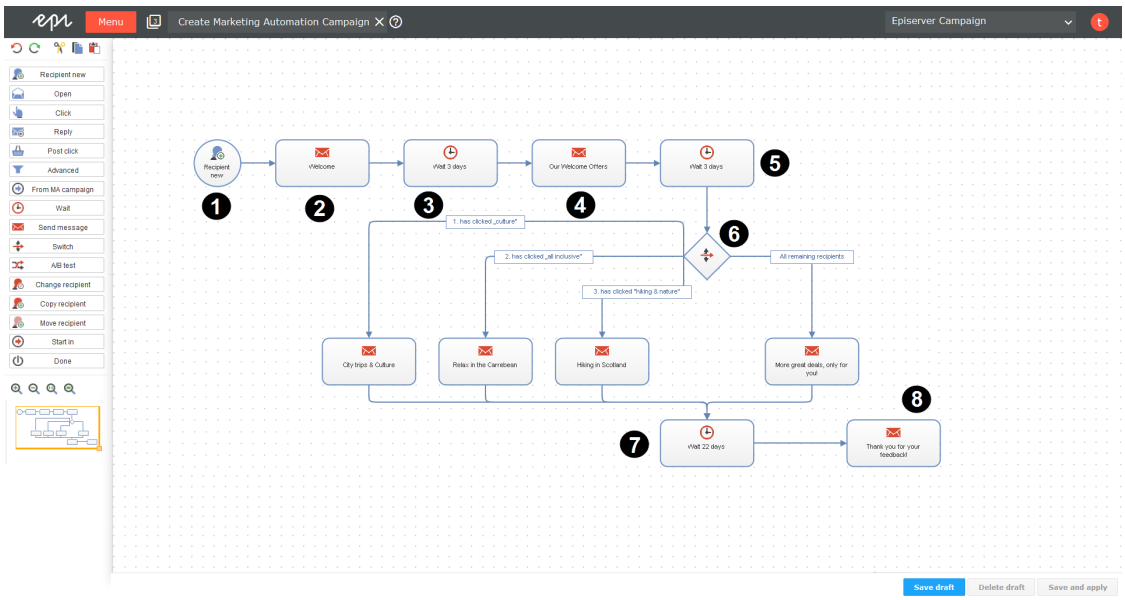
the offer into three categories: "Hiking & Nature", "All inclusive" and "Culture". All of this is placed under a mailing named "Our gift to you".

Mailings that are to be used in association with marketing automation must be set up as **Special/API** mailings and be in **Send** status.

Once all these steps have been taken, then we can take a look to see how this campaign looks in association with marketing automation. The campaign should begin via the **Recipient new** start node for all recipients newly added to the main recipient list (either through self-registration or import):



Guidelines for creating a multistage series of welcome messages:

1. A multistage series of welcome mails begins via the start node **Recipient new** to ensure that only those recipients are cycled through this campaign who are new subscribers to the newsletter and therefore recently added to the recipient list.
2. Once the start node is set, drag the **Send message** action node into the workspace, select the type of mailing to be distributed in the properties field for this node and then link the start node with it.
3. After the recipient has received the first welcome email, he is granted a short breather using the **Wait** action node. This duration of this interval is set in the properties window of the **Wait** node once it has been linked to the previous node. In our example, the count is set to 3 and the unit to **days**, meaning the recipient will wait 3 days before the next action is carried out.
4. The next step is to select the subsequent mailing using the **Send message** action node. This mailing will contain the coupon offers including click profiles, as described above, which will be

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used to send out the individual follow-on emails with reinforcing messaging. Once again we need simply drag the action node into the workspace, select the mailing and link the node.

5. To give the recipient sufficient time to read and click, the **Wait** node will again be set at **3 days** and dragged into the appropriate workspace.
6. The following step is essential for distributing the follow-up mailings. Using the action node **Switch** lets the recipient receive different mailings based on target groupings. In this case there are four different mailings to be employed following the branch. These mailings are placed behind the **Switch** node with the aid of the **Send message** node, as shown in the diagram. Next the individual branches are set and linked to the nodes. One target group is allocated to each of the branches. In this case there are three branches assigned to target groups while one branch is defined so that it takes in all those recipients that do not correspond to any of the three target groups. If a target group does not match the **Send message** node with which it is associated, then it skips over this node and the mailing is not sent to the recipient.
7. As per requirements, the recipient should receive a feedback mailing 28 days after registering. If you subtract the 2x3 days employed by the wait-nodes from this 28 day period, you should place a wait-node with a value of **22 days** at this point.
8. After being on the recipient list for 28 days, by using an additional **Send message** node, the recipient will then receive the final mail of this campaign.

Cross- and upselling

Once new newsletter subscribers have established a relationship with a company, they then have to be won over by a product or brand. Lifecycle marketing is geared to building increased interest and purchasing incentives through campaign emails, trigger mails and themed mailings. The easiest way to provide added value is by supplying the customer with relevant information about a purchase or reservation that is both helpful and supportive. This is very easy to do. In considering a purchase or reservation, several steps immediately come to mind that a company might take in support of the customer. A simple example involving a flight booking would be to provide the customer with suitable recommendations for hotel accommodations or car rental agencies for the period he or she will be traveling. Small efforts like these can produce significant rewards. Information about restaurants and other activities available at the destination may be of interest to the customer as well. And supportive measures of this sort can be applied to more than just flight or travel reservations. They are appropriate to practically any sort of product. To return once again to our example from the travel industry: On returning from abroad, travel agency customers could be offered a photo album that they can purchase directly online to use for their vacation snapshots.

To make use of cross- and upselling offers, you must first set up post click tracking in your online shop, to know which products a customer has previously purchased. This data is required for the campaign. Post click tracking must provide the following data in this case:

- Which product did the customer purchase?
- Was the purchase completed?

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- Arrival and departure dates
- Optionally, the value of the order

Contact the Episerver support team to set up post click tracking. Setting up post click tracking may involve additional charges.

Target groups and mailings

To later select the correct mailing with the corresponding hotel and rental agency recommendations, a target group must be allocated to each destination. The target group definition would be: "Addressee generated a post click in the category flight" with the value "Mallorca" / "Grand Canary Islands" / "Sardinia" / "Athens" / "Antalya" / etc. A target group will be assigned to each destination.

An additional target group date-of-return matches with the current date. Next, a mailing must be allocated to each travel destination or, alternatively, an individual mailing containing a paragraph about each destination can be associated with a target group. In the example, this is the option selected. A paragraph is included in the mailing for each target group set up during the previous step. To keep the promotions up to date, this paragraph is linked to a content interface. You would also need to have a mailing that would be distributed once the customer has returned home. This mailing looks the same to all recipients:

- "Before you fly: Our hotel recommendations"
- "Welcome back! Here's a place to put your vacation pictures"

The target groups compiled with the help of post click data will look different depending upon the configuration of the post click tracking or the web-analysis software being used. For instance, with some web-analysis products you are allowed to select the **product purchases** category and then specify in greater detail. The example here was based on the configuration of post click tracking in which a post click is produced only after an order has been completed, eliminating the need for that particular pre-selection.

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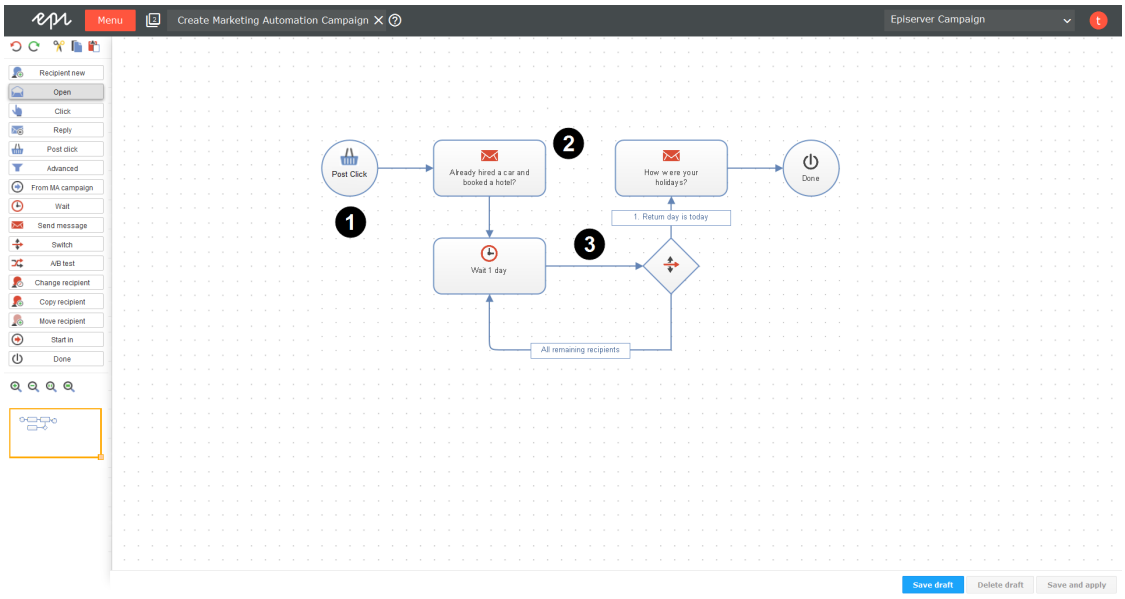

Guidelines for creating "Before you fly: Hotel recommendations"

1. This type of campaign begins at the **Post click** node. The parameter for this node should be set to "category same as flight".
2. Since the selection of destination in the mailing – and with it the corresponding hotel accommodations – occurs by target group, you merely choose this mailing and send it on to the recipients. To expand this campaign to include other promotions, such as for rental cars, you need only modify the mailing and the individual paragraphs within it.
3. Lastly, a loop is incorporated which inquires daily whether the return date equals that day's date. Also, a wait node is set with a value of **1 day** and after it a branch. The latter filters the target group **return date is today**. This group receives the mailing "Welcome Back: Now here's a place to put your pictures," together with a coupon that can be used to order the photo album. All other recipients are reset to the wait node.

Cancelled transactions

There are numerous reasons why customers abort orders, purchases and other transactions. If a customer has taken the time to pick out a product and place it in the shopping cart, that is usually a good indicator that he has a genuine interest in that particular product. Through a specifically targeted campaign, you can give the customer an incentive to complete the transaction. In our example, customers who abort transactions are sent a coupon, together with recommendations for related items. A campaign like this is very easy to create. First, a web analysis software is employed to filter out all recipients who put a trip/tour into the shopping cart but did not complete the transaction. A web-analysis tool like Adobe Analytics can be used to transfer all records of sales/reservation cancellations directly to Episerver Campaign.

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There are a variety of means for finding pertinent alternatives to a cancelled reservation. Using categories and target groups it's possible to create a mailing containing paragraphs that describe trips/tours similar to the one that was cancelled and then send this mailing to those who cancelled transactions. Alternatively, you can use the web-analysis software from Econda to automatically generate recommendations that are then distributed via a re-mailing. The target group for this campaign is similar to that used in a cross- and upselling campaign, with the one difference that in this case the "transaction cancellation" category is used:

```
Addressee generated a post click in service "Analytics" with a value of
"Mallorca" /
"Grand Canary Islands" / "Sardinia" / "Athens" / "Antalya" / in the cat-
egory
"Transaction cancellation".
```

A target group must be allocated to each destination.

Since the campaign is to be carried out in two steps, two mailings are required: a coupon mailing as well as a mailing containing recommendations:

- "May we recommend"
- "Book now and redeem your coupon"

A separate paragraph is inserted into the mailing for each of the target groups created in the previous step. Web-analysis tools such as Adobe Analytics and Econda can be used to provide transaction cancellations. Using Econda, you can simultaneously generate suitable recommendations for transaction cancellations and then transfer those to Episerver Campaign, then create a campaign aimed at this grouping.

Contact our customer support team about connecting web-analysis software to your client. Accessing web-analysis tools may involve additional charge.

Creating target groups and mailings

The target groups for this campaign are the same used for the cross- and upselling campaign, with the one difference being that in this case the **transaction cancellations** category will be tracked. When using the web-analysis software from Adobe Analytics, the target group will look like this:

1. Addressee generated a post click
2. in the service **Analytics**
3. in the **transaction cancellation** category
4. using the word

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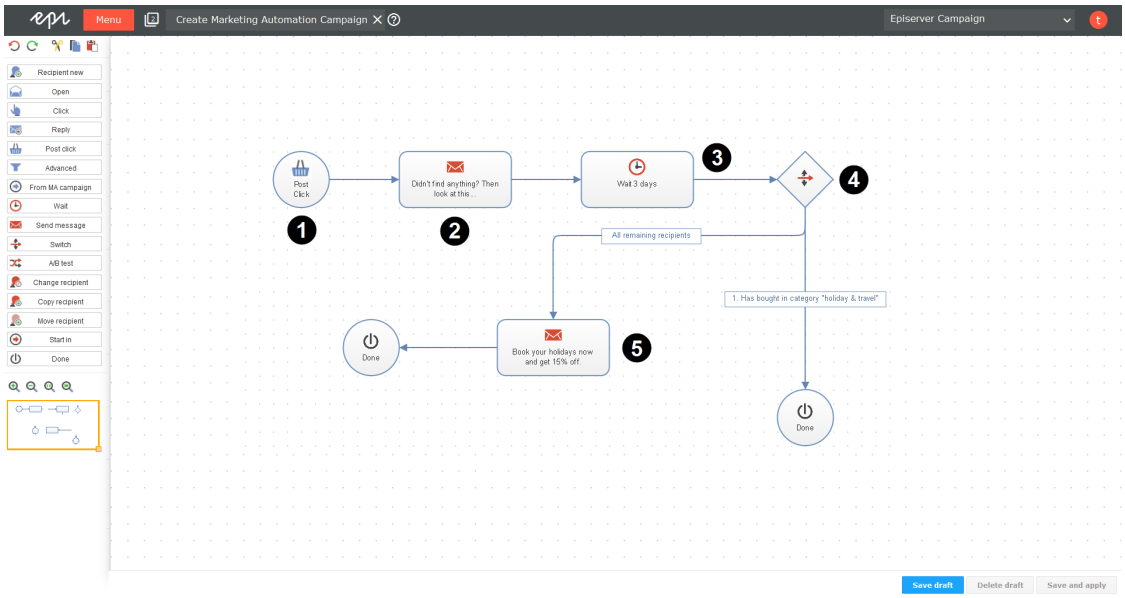
- Mallorca
- Gran Canary Islands
- Sardinia
- Athens
- Antalya
- ...



Guidelines for creating a campaign for transaction cancellations:

1. This sort of campaign begins at the **Post click** node. The **Analytics** service and the **transaction cancellations** target group are set as parameters for the node.
2. Recipients filtered by these nodes receive pertinent recommendations relating to the trip/tour previously considered. The selection of the recommendations contained in the mailing occurs via target groupings.
3. Next, a **Wait** node is set to a value of **3 days**.
4. In the following step, a branch is set up. For each target group, all recipients who purchased a trip/tour are filtered out using the **has purchased** target group created previously. For these recipients the campaign is now concluded.
5. All other recipients, meaning all those who did not make a purchase, will now receive a coupon mailing.

Multistage campaign for more conversions

This type of campaign is designed to introduce and familiarize your regular recipients with products and services. It requires relatively little effort to execute since the content of the various mailings remains

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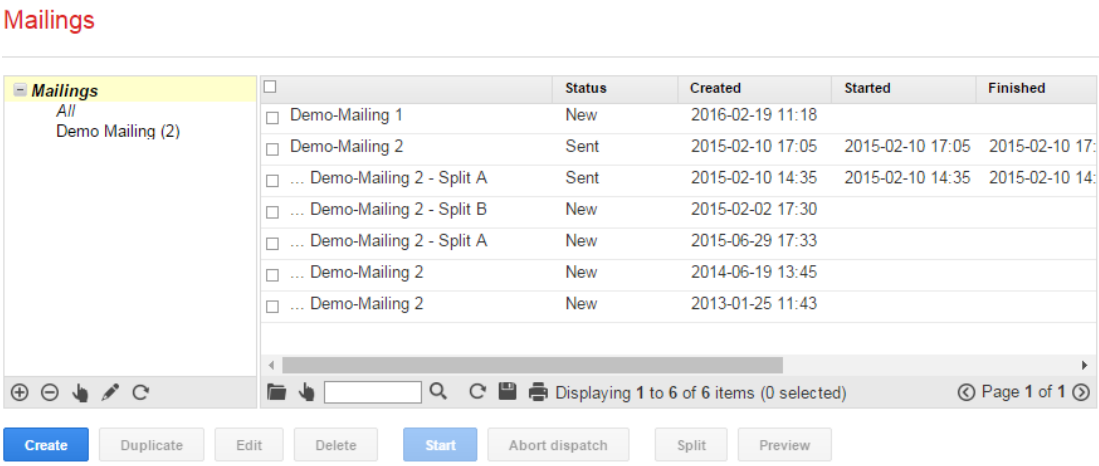
essentially the same. By modifying the subject lines and the order of the paragraphs used in a mailing, you can highlight a product's various benefits and characteristics.

You will need to use post click tracking to conduct the type of campaign described here. Post click tracking lets you use target groups to filter out recipients who have generated a conversion. Alternatively, if you do use post click tracking, you can configure target groups that filter out all recipients who clicked on the registration link for your online shop in an email.

This type of target group produces less precise results since it also includes recipients who clicked on a link but did not complete the registration or purchasing process.

Mailings required for the campaign



- Principal mailing (type: regular) with two split mailings, each with a modified subject line (**re: A and B**).
- 2 copies of the principal mailing (type: special), each with a different subject line (attract interest, call-to-action) (**re: C and D**).
- Alternate version of the principal mailing (type: special) with the content rearranged or modified to shift the focus of a mailing (**re: E**).
- Copy of this variant (type: special) with a different subject line urging call-to-action (**re: F**).

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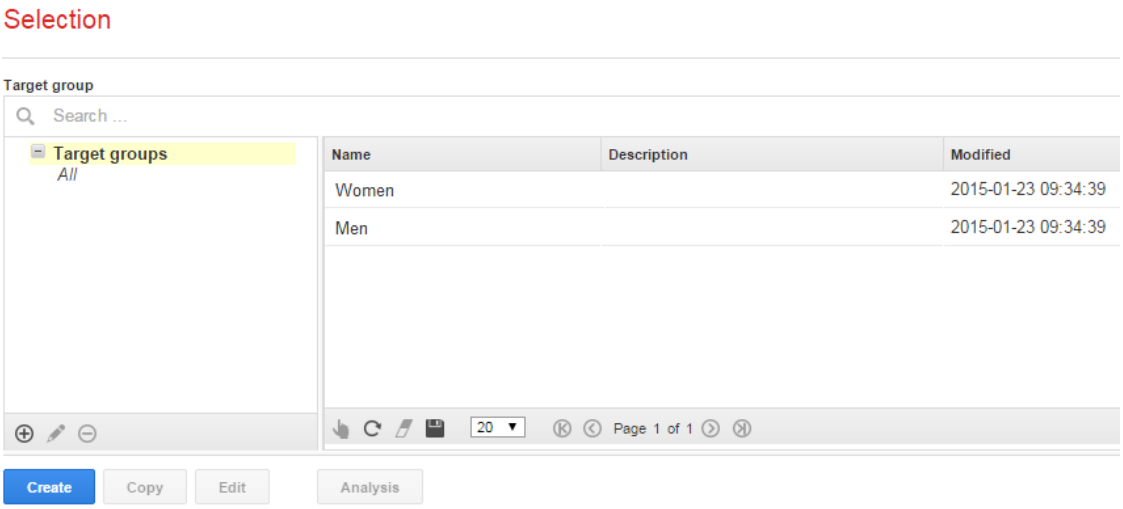
Target groups required for the campaign



- Target group that matches all recipients who received the principal mailing or one of the split mailings.
- Target group for those recipients who did not open the principal mailing.
- Target group for recipients who did not open the second mailing.
- Target group for recipients who did not open the third mailing.
- Target group that analyzes post clicks and matches all those recipients who generated a conversion (e.g. completed registration or purchase).
- Target group for those recipients who opened a mailing but did not generate a conversion.

Campaign procedure

The first stage of the campaign consists of a classic A/B split test, used to determine the subject line that generates the greatest number of openings or clicks. The mailing that performs best is then sent to the remaining recipients. The automated campaign begins 24 hours later, when recipients are sent additional mailings in several stages.

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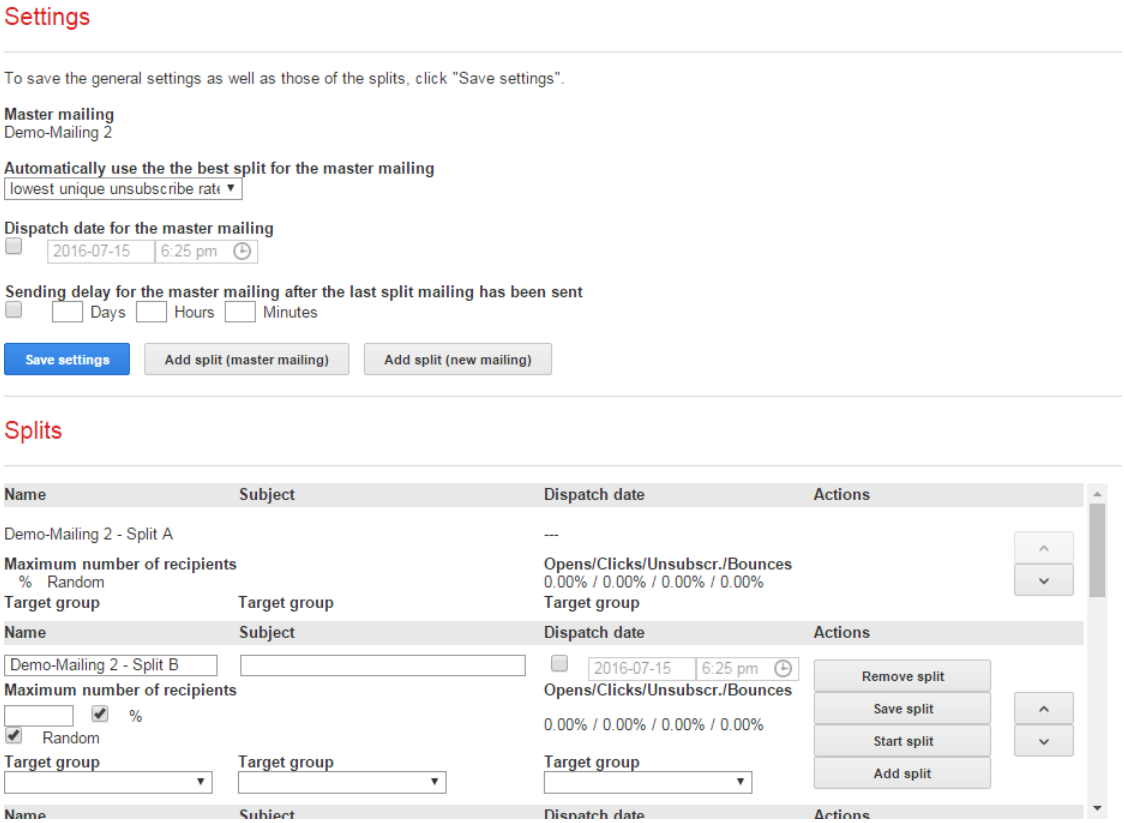

First stage: Subject line optimization through use of split mailings

1. Create principal mailing with desired content.
2. Prepare a split mailing from the principal mailing, with subject line version A.
3. Prepare a second split mailing of the principal mailing, with subject line version B.
4. Go to **Automatic selection of best split for principal mailing** and choose the desired option (e.g. **best unique opening rate** or **best unique click rate**) and set a 1 day delay for the automated distribution of the principal mailings.
5. Save your settings.
6. Launch the split mailings either manually or automatically.

Create a campaign that will launch after the principal mailing has been sent out.

This campaign must be created **before** the split mailing is launched and that all the mailings in this campaign must be set as **special**.

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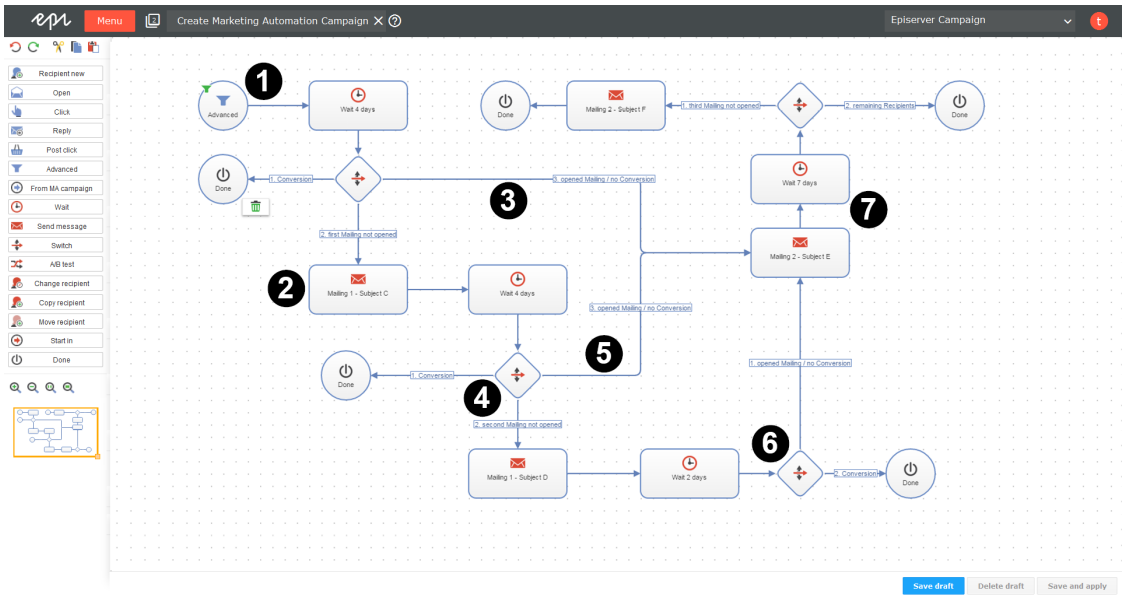

Second stage: Automated distribution of follow-up and reminder mailings

1. The campaign starts with an **Advanced** node. This node filters out all recipients who have received the principal mailing or one of the two split mailings. Initially, the standby time is set to four days to provide recipients sufficient time to respond.
2. Recipients who open the first mailing during this period, but have not generated a conversion, will not receive mailing C and instead will be sent the two-stage reminder that concludes the campaign. The campaign terminates for those recipients who have generated a conversion.
3. Next, all recipients who have not opened this mailing and have not completed registration will receive the modified subject line C. They will then be given another 4 days to respond.
4. As in step 3, all the recipients who opened mailing C during this period, but who have not generated a conversion, are then sent the two reminder mailings. The campaign terminates for those recipients who have generated a conversion.
5. All recipients who have not opened mailing C are sent another mailing with subject line D.
6. After another 4 days, recipients who have completed registration are filtered out and, for them, the campaign terminates. All recipients who have opened mailing D, but have not generated a conversion, next receive the first reminder mailing. This mailing with subject line E contains the content from the principal mailings in a different order or with a different focus. Recipients who have so far not opened any mailings will be disregarded from this point on.
7. After a week, all recipients who have not opened the first reminder will receive a second reminder. This mailing is identical to the first, but contains another version of the subject line with a call-to-action. The campaign then terminates.

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Transactional mails

You can use this function to create transactional mails that are sent automatically as a result of actions or incidents. There are two application scenarios for transactional mails.

- **API mails**: These are mails that are sent as a result of an API call, such as the placing of an order from the online shop. For this type of transactional mail, you will need an HTTP API or SOAP API. See the Episerver Campaign SOAP API and Episerver Campaign HTTP API documentation for information.
- **Campaign mails**: These are mails that are used in a Marketing Automation campaign. You can create campaign mails using this function, and you will need to select the corresponding transactional mail in the marketing automation function if you are editing the Send message node.

Once started, transactional mails remain in the **Sending** status. Transactional mails are sent in real-time via the high-performance Episerver Campaign transaction API.

Transactional mail overview

➜ To open the overview, open the start menu and, under **Campaigns**, click **Transactional mails**.

✔ All transactional mails are displayed in the list at the top half of the window. In the **Status** column, you can see whether a transactional mail has already been sent, is incomplete, has been canceled or has not yet been started.

Media type

Four media types can be selected for transactional mails, each of which are sent via different channels. The recipient list and delivery channel for a transactional mail must be compatible:

- **mail**: Sends an mail to the recipient. The recipient list must be of the type **mail**, or must be a multiple list.
- **Print**: Sends a message to the recipient via post (letter or postcard). The recipient list must be of the type **Print**, or must be a multiple list.
- **Fax**: Sends a fax message to the recipient. The recipient list must be of the type **Fax**, or must be a multiple list.
- **SMS**: Sends an SMS message to the recipient. The recipient list must be of the type **SMS**, or must be a multiple list.

Status

In the overview, a status is shown for each transactional mail. The statuses have the following meanings.

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- **New**: The transactional mail is fully configured but has not yet been started.
- **Incomplete**: Elements are missing or necessary parameters have not been defined. The transactional mail cannot be started in this status. Firstly complete the configuration and then start the transactional mail.
- **Sending**: The transactional mail is active and is sending mails.
- **Cancelled**: The sending of mails via this transactional mail has been cancelled and cannot be restarted.

Transactional mail actions

The buttons below the overview can be used to perform the following actions for transactional mails.

Some of these actions are not available for new or incomplete transactional mails.

- Create
- Copy
- Edit
- Delete
- Start
- Analysis

Create

→ To create a new transactional mail, click Create. You can read more about this in the Create and edit campaign section.

Copy

→ To copy an existing transactional mail, select it from the list and then click Copy. All elements (recipients, target groups, messages etc.) are applied.

Edit

→ To make changes to a transactional mail, select it from the list and then click Edit. You can read more about this in Create and edit campaign.

Delete

→ To delete a transactional mail, select it from the list and then click Delete.

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You can delete only new or incomplete transactional mails.

Start

To start a transactional mail, select it from the list and then click Start. Confirm the start by clicking Start mailing in the dialog box.

Analysis

To check how many mails have already been sent via an ongoing transactional mail and to see additional parameters such as opens, clicks, bounces or unsubscribers, select an active transactional mail from the list (in **Sending** status) and then click Analysis.

Confirmations

This function allows you to manage your registration confirmations. Registration confirmations (opt-in emails) are sent automatically as soon as a recipient registers for your newsletter. Once started, registration confirmations remain in the **Sending** status. Registration confirmations are sent in real-time via the high-performance Episerver Campaign transaction API.

Registration confirmations overview

To open the overview, open the start menu and, under **Campaigns**, click **Confirmations**. All registration confirmations are displayed in the list at the top half of the window. In the **Status** column, you can see whether a registration confirmation has already been sent, has not yet started, or has been canceled.

Media type

Four media types can be selected for registration confirmations, each of which are sent via different channels. The recipient list and delivery channel for a confirmation must be compatible.

- **Email**: Sends a registration confirmation to the recipient via email. The recipient list must be of the type **Email**, or must be a multiple list.
- **Print**: Sends a registration confirmation to the recipient via post (letter or postcard). The recipient list must be of the type **Print**, or must be a multiple list.
- **Fax**: Sends a registration confirmation to the recipient via fax. The recipient list must be of the type **Fax**, or must be a multiple list.
- **SMS**: Sends a registration confirmation to the recipient via SMS. The recipient list must be of the type **SMS**, or must be a multiple list.

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Status

In the overview, a status is shown for each registration confirmation. The statuses have the following meanings.

Sending: The registration confirmation is active and is sending opt-in emails to newly registered recipients.

Cancelled: The sending of this registration confirmation has been canceled and cannot be restarted.

If you would like to resume the sending process, contact customer support.

Registration confirmation actions

The following can be used to perform the following actions for registration confirmations:

- Edit
- Cancel
- Analyze

Edit

- To make changes to a registration confirmation, select the registration confirmation from the list and then click Edit. You can read more about this in the Create and edit campaign section.

Cancel

- To cancel the sending of an active registration confirmation (in Sending status), select the registration confirmation from the list and then click Cancel.

Canceled registration confirmations cannot be restarted. If you would like to resume the sending process, contact customer support.

Analyze

- To check how many opt-in mails have already been sent via a registration confirmation and to see additional parameters such as openings, clicks, bounces or unsubscribers, select an active registration confirmation from the list (in **Sending** status) and then click Analysis.

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Message templates

You can use this function to create templates for messages that you want to send via Smart Campaigns. You cannot send message templates themselves. Use message templates if you frequently reuse mailing templates, content, subjects and sender information in your campaigns. You can use message templates to quickly and easily create new campaigns and to skip the message configuration steps.

Message templates and content templates

In the Episerver Campaign Smart Campaigns, there are two types of templates – message templates and content templates. A content template is set up by our customer support team. When you insert a message into a campaign and then edit this message, you can select a content template as the source. Mailing templates must be configured for sending, i.e. you will need to insert the sender information (email address, name, telephone number) and other parameters.

You can create message templates yourself, and configure these with sender information, recipient lists and other parameters. To add content to a message template, you will need a content template to be used in this message template, or alternatively you can add HTML code directly.

Template overview

→ To open the overview, open the start menu and, under **Campaigns**, click **Message templates**.

✔ All templates are displayed in the list at the top half of the window.

Template actions

The buttons underneath the template overview can be used to perform the following actions for message templates:

- New
- Copy
- Edit
- Delete

New

To create a new message template, perform the following steps:

→ 1. Click New.

→ 2. In the drop-down list, select one of the following options:
   - **New**: Select this option to create a new message template based on the free-text template or on another template. Click **New** in the left-hand column and then select a template from

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the list on the right.

- **Message**: Select this option to apply content from an existing message to this message template. Click **Message** in the left-hand column and then select a message from the list on the right.

If you have previously worked with the **Mailings Classic** function, you can also select mailings here and apply the content created using this function.

- **Message template**: Select this option to apply the content and configuration of an existing message template. Click **Message template** in the left-hand column and then select the required template from the list on the right.

3. Click Next to edit the message template.

Copy

To create a new message template and apply the content and configuration of an existing message template, click on a message template in the list with the parameters that you want to apply, and click Copy.

Edit

To edit an existing message template, click on a message template in the list and then Edit.

Delete

To delete a message template, click on a message template in the list and then Delete.

Basic configuration

A message template usually contains sender information and content that can be reused in each new message. However, you can also save and use your message templates without having to configure these parameters. Depending on the dispatch channel, proceed as follows:

- Email
- Fax
- Print

Email

Sender information, subject and attachments

To configure an email for sending, perform the following steps:

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1. Right at the top of the window, click Sender, subject, attachments.
2. In the **Sender** area, specify the sender information that you want the recipients of your mailing to see. There are two parts to this information:
   - **Email address**: Enter the address part of the sender information. The domain (the part of the email address after the @) is pre-set and cannot be changed.
   - **Name**: This name is displayed as the sender information in the recipient's email program. The company name is usually used here.
3. In the **Subject** area, enter a subject for your message.

Together with the sender information, the subject line (Subject) for your mailing is the most important factor in deciding the success of a mailing. The "right" subject line can significantly increase the opening rate for a mailing. Do not make your subject line too long, as otherwise it might be "cut" by the email program. Sticking to a length of 45 characters ensures that the subject line will be displayed in full. The benchmark of 60 characters is given as the maximum length, and this will be displayed in full by the majority of email programs.

4. You can use personalizations in the subject line, and send messages to target groups with different subject lines:
   - To create personalized subject lines, click **Insert field function** and select the required recipient list field or the required field function from the list.
   - To add a target-group-specific subject line, click Add subject and enter the text into the new field. Then select a target group for whom you want to use this subject line. You can add as many additional subject lines and target groups as you like.
5. Switch to the **Attachments** tab.

✔ All available attachments are displayed in a list.

6. In the list, click the file that you want to send.
7. To upload a new attachment, open the start menu and in the **Campaigns** menu, click **Attachments**. For more information, read the Attachments section.
8. Click Apply
9. Click Save to apply the changes to the template.

Encoding

This setting allows you to specify the character set with which you would like to encode your mailing. In addition to the standard characters (Latin letters, numbers, punctuation characters), the character set also includes special characters (such as German umlauts). Characters that would be displayed

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incorrectly or not at all on the recipient's computer can be correctly interpreted in this way. To configure the message encoding, perform the following steps:

1. At the top right-hand side of the window, click More and then in the menu, click **Character set ("Encoding")**.
2. Select the required character set.:
   - **ISO-8859-1**: Select this encoding if you are contacting recipients in German-speaking regions, Western European countries and North America.
   - **ISO-8859-2**: Select this encoding if you are contacting recipients in Central/South-Eastern European countries, e.g. in Poland, Croatia or Slovakia.
   - **UTF-8**: The UTF-8 format supports most of the special characters found in all languages. Select this encoding if you are contacting recipients in other parts of the world, e.g. in Eastern Europe or Turkey.
3. Click Apply to complete the encoding configuration.
4. Click Save to apply the changes to the template.

Fax

To configure a fax for sending, perform the following steps:

1. Right at the top of the window, click Sender. If you have selected a PDF file for sending, you will find the sender information in the **Sender** area.
2. If multiple telephone numbers have been configured as sender information in your client, then select the required number from the **Sender number** drop-down list. If just one sender number is configured, then you do not need to select anything here.
3. Click Apply.
4. Click Save to apply the changes to the message template.

Print

To configure a print message for sending, perform the following steps:

1. Right at the top of the window, click Sender, dispatch option, format.
2. From within the **Dispatch option** area, select one of the following dispatch options:
   - **Fast dispatch**: With this type of dispatch, the post-based delivery will usually arrive after two working days if sent before 8 PM (CET). In individual cases (or if the item is sent after 8 PM), the delivery will arrive on the third working day following dispatch.
   - **Cheap dispatch**: This type of dispatch is suitable for printed items that are not particularly urgent, such as promotional letters.

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The delivery usually takes place within six working days after data input. The use is permitted only for purely promotional communications (e.g. direct incitement to buy, offers or aid appeals).

3. Click Apply.
4. Click Save to apply the changes to the message template.

Content

Add content to your message template that you would like to reuse in your messages (e.g. header and disclaimer). Proceed as follows:

- **Email message templates**: You can read more about this in the Edit mailing content section. If you are using the Template Kit, you will find detailed information on this in the The Template Kit chapter.
- **Fax message templates**: If you are using a fax message template, read the Episerver Fax chapter. The control elements of a fax message template are identical to those of an email message template.
- **Print message templates**: You can read more about this in the Edit print message content section.

Mailings Classic

The **Mailings** window allows you to get an overview of all your mailings and to take the most essential actions (new mailing, start mailing etc.).

The table displays all mailings that were created with this client/account. The **Status** column indicates whether the mailing has already been sent, is currently being sent, or is still being worked on (status = new). The **Start date** field is only filled in if a future start date has been set for a particular mailing.

Mailing type

If your account has been authorized to display the type, the corresponding column shows you the specific type of each mailing. Types may be selected from the following:

- **Regular**: Standard mailings.
- **Special/API**: Mailings that are unique in the system and are activated using an interface (API) or by an event. For example, a prepared mailing that every recipient receives only once each year, for example on his or her birthday.
- **Registration confirmation**: Prepared greeting mails that are sent to new recipients.
- **Templates**: Mailings of this type cannot be started. They serve only to simplify the creation of new mailings. Templates are pre-configured mailings that, for example, already contain sender

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information or content. If you have templates in your account, you can use one to create a new mailing.

Mailing actions

The buttons below the mailing list start one of the following actions:

- Create
- Duplicate
- Edit
- Delete
- Start
- Abort sending
- Preview

Create

→ To create a new mailing, click Create. For more information, see the Create new mailing section.

Duplicate

→ To copy a mailing, mark an existing mailing and click Duplicate. The entry fields (subject, content, recipient list, etc.) will not be empty, but are filled with the same values as in the source mailing. If your mailings tend to be very similar, you can save a lot of time by only having to change the values that are different.

Edit

→ To change the values in a mailing, mark it and click Edit. This is only possible if sending has not yet been started.

Delete

→ To delete a mailing, mark it and click Delete. This is only possible for mailings that have not yet been sent.

Start

→ To start a mailing, mark it and click Start.

Abort sending

→ To cancel the sending of a mailing, mark it and click Abort sending. Be aware the mailing cannot be restarted thereafter.

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Preview

Click here to display a personalized preview of a mailing. Perform the following steps:

1. In the **Mailing** drop-down list, select a mailing.
2. Click Preview.
3. In the **Recipient list** drop-down list, select a recipient list and then select a recipient.
4. Click Show.
5. For Print and fax mailings it is also possible to save the preview as a PDF. To do so, click Save result as PDF.

Details

The **Details** section offers you various specific information about your mailings. Simply select a mailing from the **Mailings** list above.

- General
- Report
- Preview content

General

This tab gives you various information about the selected mailing, for example, ID, name, creation date, sending date, recipient list(s) and target groups.

Report

Clicking on the **Report** tab will display the most important report data for the mailing. Until the mailing has been started, all fields are empty or zero.

Some fields show two values. The italic value always indicates a unique value, i.e. a unique user action. If a recipient clicks several times on one link, this is counted as one unique click, since it was the same recipient who clicked on the same link.

If percentages for **Gross-...** are indicated, this means that the value is related to the total number of recipients for a particular mailing. If the **Gross-...** prefix is not used, the value relates to the number of **Recipients w/o bounces**. This is then the more practical count, as it refers only to those recipients who actually received the mailing and could react either in the form of opens or clicks.

The following values are displayed in the summary:

- **Recipients**: Number of recipients to which Episerver Campaign attempted to send a mailing.
- **Recipients w/o bounces**: Number of recipients whose email addresses did not produce a bounce (message of non-deliverability).

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- **Recipients skipped**: Number of recipients to whom the mailing could not be sent because their addresses were clearly false.
- **Recipients in queue**: Only applies to mailings currently being sent. Number of recipients who have not yet been sent a mailing.
- **Bounces**: Number of non-deliverability messages received by Episerver Campaign after a mailing.
- **Bounce rate**: Percentage of bounces.
- **... of which are hard bounces**: Percentage of bounces that are hard bounces (email address permanently unreachable).
- **... of which are soft bounces**: Percentage of bounces that are soft bounces (email address temporarily unreachable).
- **Unique opens**: If a recipient opens a mailing several times, this option only counts these opens as one unique open.
- **Opens**: Total number of opens.
- **Unique open rate**: Percentage of unique opens in relation to the number of recipients w/o bounces.
- **Open rate**: Percentage of total opens in relation to the number of recipients w/o bounces.
- **Unique gross open rate**: Percentage of unique opens in relation to the total number of recipients.
- **Gross open rate**: Percentage of total opens by recipients.
- **Unique clicks**: Number of unique recipients that clicked an arbitrary link in a mailing. It does not matter how often and which link the recipient clicked.
- **Clicks**: Total number of clicks.
- **Unique click rate**: Percentage of unique clicks in relation to the number of recipients w/o bounces.
- **Click rate**: Percentage of total clicks in relation to the number of recipients w/o bounces.
- **Unique gross click rate**: Percentage of unique clicks in relation to the total number of recipients.
- **Gross click rate**: Percentage of total clicks of all recipients.
- **Effective unique click rate**: Percentage of unique clicks in relation to the unique opens.
- **Unique unsubscribes**: Number of clicks on the unsubscribe link.
- **Unique unsubscribe rate**: Percentage of clicks on the unsubscribe link in relation to the number of recipients w/o bounces.
- **Unique gross unsubscribe rate**: Percentage of clicks on the unsubscribe link in relation to the total number of recipients.

This is only a summary of the most important core indicators. More comprehensive reports can be found under Reports.

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Preview content

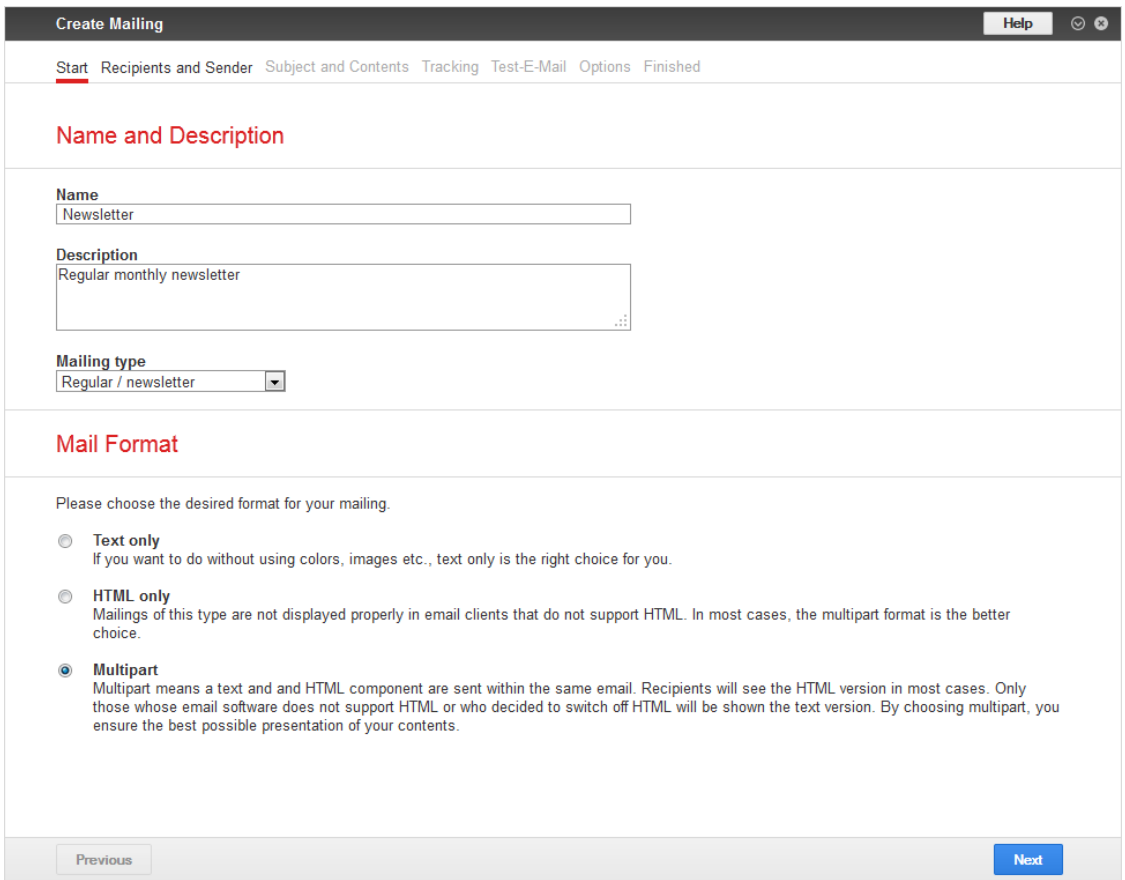
When you click the **Preview content** tab, the mailing and its subject line are previewed in detail.

Create new mailing

This function is used to enter content and make all necessary settings and entries to send a mailing. The following six steps correspond to one tab in the application each.

If your client is configured for different media types, you can create emails, as well as fax and short messages. In the **Mailings** window, click New. Then click on the desired media type: Email, Fax or SMS.

Step 1 – Name and description



This data is used internally by Episerver Campaign and not part of the emails received by the recipients of the mailing.

The name serves to later identify your mailings. It is best to choose a meaningful name such as "Customer Newsletter from May 23, 2018" or "Product Information for Ball Bearing 234/3 Rollout".

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The **Description** field is optional. However, it may be useful to quickly find out what the mailing was about. For example, you could include the most important topics covered in the current issue of a regularly sent newsletter as keywords. Later, if you want to see an older newsletter while preparing a new mailing, you can find it again with ease in the **Overview** menu item .

If your account has sufficient authorization, you can select the type of mailing from the **Mailing type** field. The following types are available.

- **Regular**: These are normal mailings (newsletters, etc.).
- **Special/API**: These are mailings which are created once in the system and then triggered through an interface (API) or events. Example. A mailing which each recipient only receives once a year on his/her birthday.
- **Confirmation**: This is a pre-configured welcome email to be sent to new recipients.
- **Template**: Mailings of this type cannot be started. They serve to simplify the creation of new mailings. Templates are pre-configured mailings which already contain sender information or content, for example. If templates exist in your account, you will be asked to select the desired template when creating a new mailing.

Email format

The mail format determines how your mailing will be sent to the recipient.

- **Text only**: This is the format in which most personal emails (i.e. from recipient to recipient) are sent. As the name indicates, the message only consists of text characters. It is not possible to include images, colors or bold text. This functionality is reserved for HTML or multi-part emails.
- **HTML only**: The text-only part of the email is omitted and the mailing is sent exclusively in the HTML format. This format is not recommended, as it is possible that recipients with older email software which is not capable of displaying HTML will receive unreadable emails. The multi-part format is preferred.
- **Multipart**: This is worldwide the most common format for sending marketing emails. Each email sent contains the content in two different formats (text and HTML). The HTML version is shown to most recipients. However, if the recipient is working with older email software which cannot display HTML, or if he/she has deactivated the display of HTML emails, the text version will be displayed. By selecting this format, you are ensuring that every recipient of your mailing receives a readable version.
  The only shortcoming of sending emails in the multi-part format is that recipients of your mailing have no direct influence on the format in which they receive the email.

Some people prefer HTML mails because of the many additional features and information (images, color highlighting, etc.), whereas others prefer text emails to get to the desired information as quickly as possible without graphical distractions. To satisfy these demands, consider giving recipients the choice between receiving email in text or HTML format when subscribing to your newsletter on your website.

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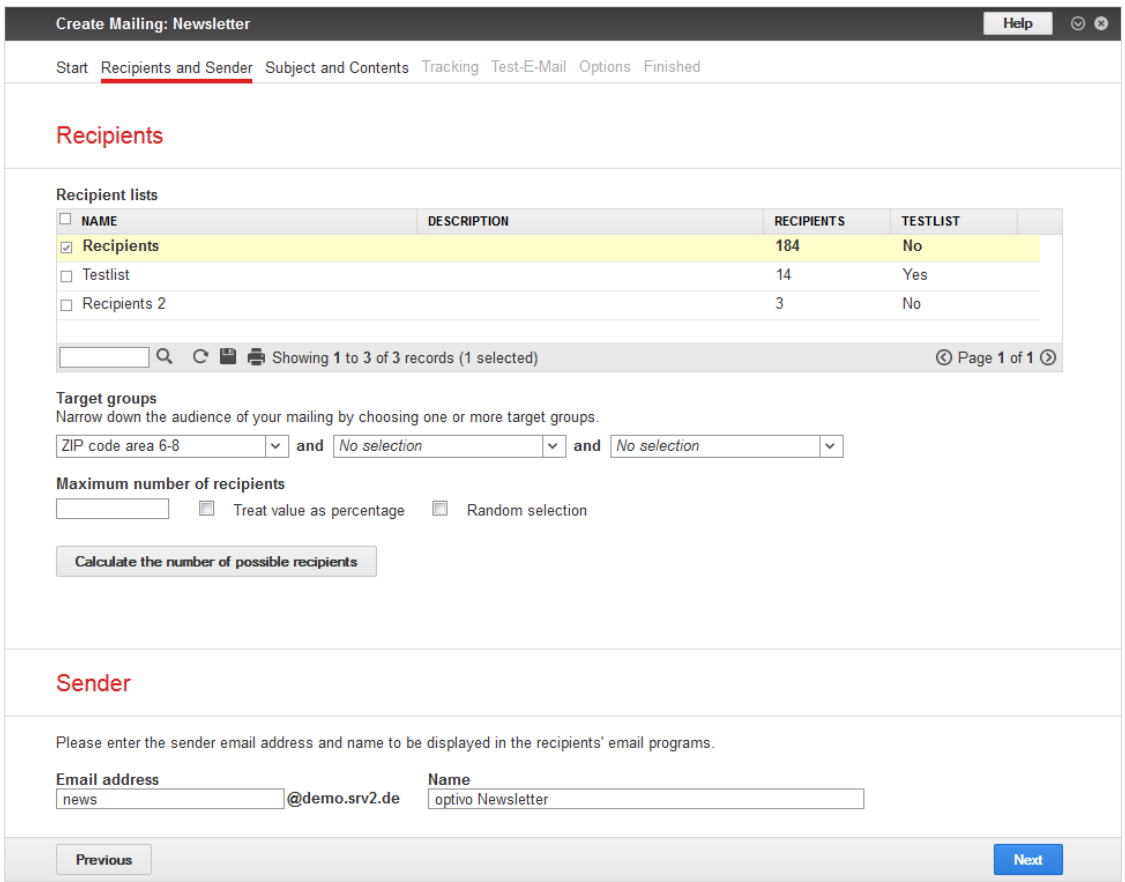
This information can be saved in your database. Episerver Campaign will then send mailings to each recipient in their preferred format. For more information, contact our customer support.

Step 2 – Recipients and sender

Recipients



The displayed list shows all recipient lists you can send your mailing to. You can select one or more for the mailing by selecting the check boxes in front of the desired rows.

When sending to multiple recipient lists, Episerver Campaign automatically ensures that recipients present on several lists only receive your mailing once.

You can use target groups if you only want to address a certain subset of a recipient list instead of the entire list. A pop-up menu is available below the displayed recipient lists. Here, you can select a target group if at least one target group has been created under the menu item Target groups. Your mailing will then be sent only to those recipients on the selected recipient lists which match your target group definition.

Naturally, the number of recipients which will receive your mailing changes if a target group is selected. To calculate the number of recipients, click Calculate the number of possible recipients.

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To address an exact number of recipients, enter the number in the **Maximum number of recipients** box. This function can be useful to test several versions of a mailing. In this way, you can, for example, send your mailing only to a small part of your recipient list.

You can then copy the mailing and modify one or more parameters (subject, content etc.). This version is then sent to a different part of your list. You can then compare the results (clicks, openings etc.) and copy the mailing with the best performance to be sent to the remaining recipients in your list.

You can use target groups to guarantee that different recipients are addressed by each of these test mailings, and that no single recipient will receive two mailings. To do this, create a target group (Target Groups) after sending the first test mailing with the definition **Recipient did not receive [name of the first test mailing]**. Then, select this target group when sending out the second mailing. You can continue in this manner when sending the mailing to the remainder of the list—in this case, the target group should be defined as **Recipient did not receive [name of the first test mailing] AND Recipient did not receive [name of the second test mailing]**.

By default, recipients are addressed in the order in which they were entered into the list. If you want to use a random selection of the available recipients, select the **Random selection** check box.

Sender

You can specify which sender address should be shown in the recipient's email software when your message is received. This information consists of two parts. the email address and the actual name. Example: In the sender address "Example Inc. [info@example.com]", "Example Inc." is the name and "info@example.com" is the email address.

- **Email address**: Enter the address section of the sender in this field. The domain section - that is the part behind the @ - is fixed and cannot be changed.
- **Name**: This is typically your company name.

You should strive for the greatest level of consistency possible in your sender address. Changing your email address and/or name may cause your mailings to suddenly be treated differently be the recipient's email program, such as being routed to a different folder, for example. This may be the case if your previous sender address is stored in the recipient's personal address book, thereby including it in the group of trustworthy senders. Losing this status may have a negative effect on the success of your mailing.

Step 3 – Subject and content

Edit content

Content management system (CMS), the Episerver template kit or HTML code. Read all about the editing tools for your mailings in the section Edit message content.

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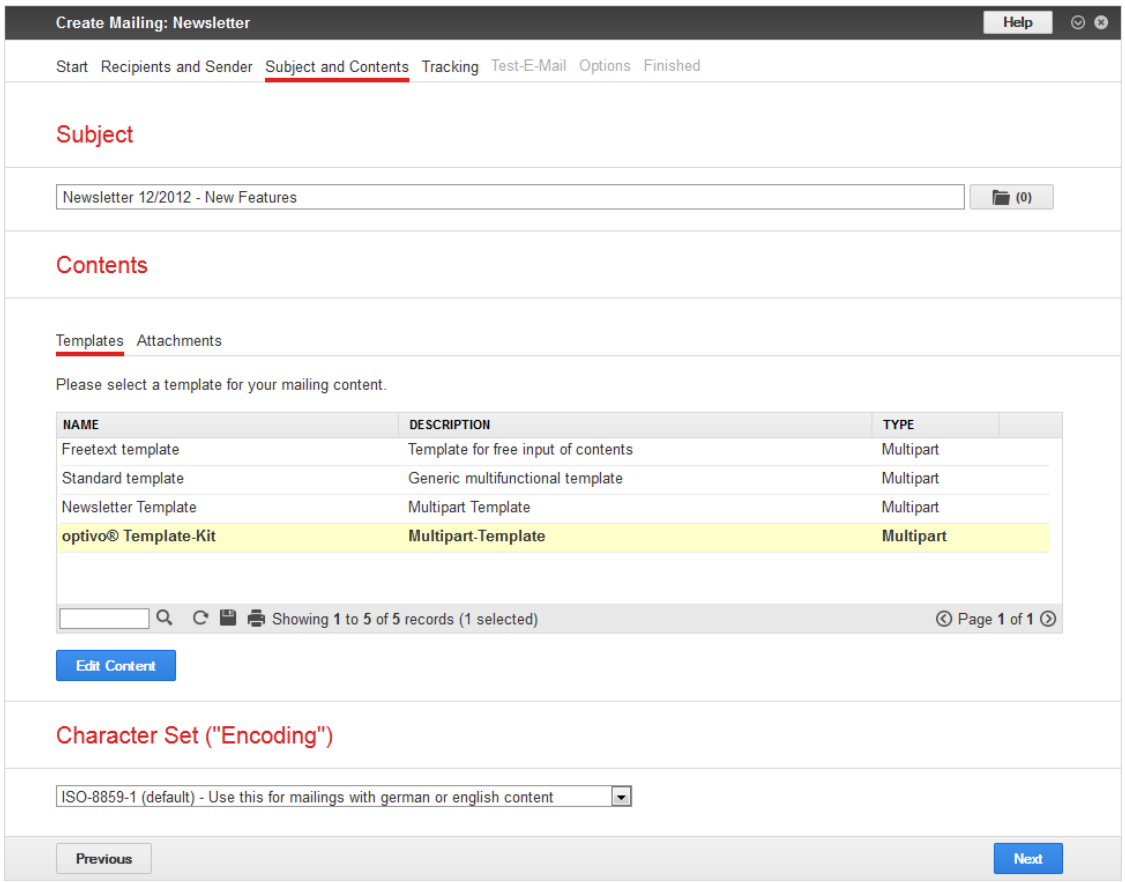
Subject



The subject line of your mailing is shown immediately next to the sender address in the recipient's email program. The sender and subject are the two factors which most strongly influence the open rate of a mailing.

You should strive for keeping the subject line to a specific maximum length, as it may otherwise be at risk of being "cut off" by the email programs of some recipients. With a length of 45 characters, you can be sure that the subject line is fully presented. However, you can safely assume that your subject line will still be shown in its entirety in the great majority of email programs with a length of 60 characters.

Content – Templates

The actual content of your mailing is created using content templates in Episerver Campaign. Use the **Free Text** template if you create your mailings externally (outside of Episerver Campaign), i.e. through your agency or yourself using an HTML editor. This will allow you to copy your prepared text and HTML content directly.

However, if your mailings will always have the same appearance (as is usually the case for newsletters), you can save precious time using specially prepared content templates. Content templates are designed to your specifications by us or you can also use our universal Template Kit.

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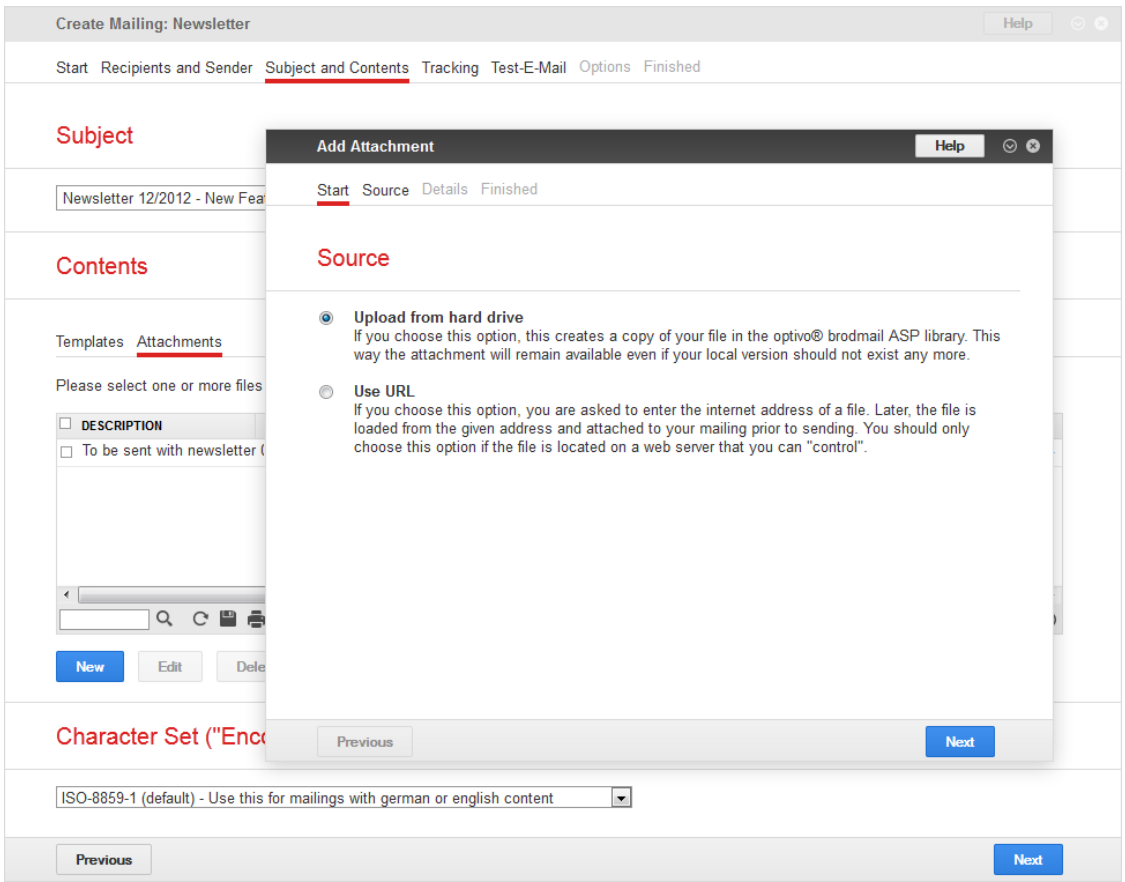
Content templates allow you to create the content of your mailing on the basis of predefined **modules**. You only need to enter the necessary text and upload images when creating a new mailing, and Episerver Campaign will create a completely formatted mailing. In this case, the user does not need any knowledge of HTML whatsoever.

To use a template for your mailing, select it and click Edit.

All about templates

Read our detailed special about email design using templates. Get tips and instructions for design and examples and suggestions of our template developers.

Content — Attachments



If you want to send attachments along with a mailing, click the **Attachments** tab. If you have already sent mailings with attachments, the files sent as attachments are shown in the overview. If you want to send one of these files again as an attachment to the current mailing, select the check box next to the description of the file.

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To send a new file as an attachment, perform the following steps:

1. Click New.
✔ The **Add attachment** window opens.
2. Select whether to upload a file from your hard disk or to use a URL that links to a file. If you choose to upload a file, a copy of the file is created in the Episerver Campaign server. If you choose to use a URL, make sure that the file is available when sending the mailing.
3. Click Next.
4. Click Browse... and select the file to be uploaded. If you link a file using a URL, enter the full URL.
5. Click Next.
6. In the **File name** and **Description** boxes enter a name and a description for the file. The name and description are used by Episerver Campaign for internal management of the attachments, but not for the sending.
7. Click Save to make the file available as an attachment.
✔ After you have uploaded or linked the file using the wizard it will appear in the list and can be sent as attachment along with the current and all future mailings.

Special characters in file names of attachments

Do not use umlauts and ß in the file name. Some email clients remove special characters from the file name. Nevertheless, the recipients can still open and save the attachments. Only the name is changed.

Do not delete files from the list of attachments even if they have only been attached to a single mailing. Since in this case the file is also deleted from the file server, it will no longer be available to recipients when they open the email.

Send attachments in offline HTML mode

Note that attachments that are sent in this mode are loaded immediately on receipt of the email. Therefore, do not send large files in this mode, as this may delay the receipt of the email. Due to a bug in the email client of Apple, attachments that are sent in HTML offline mode will not be displayed in Apple Mail and on iPhones. If you send attachments in standard mode, there is no such problem.

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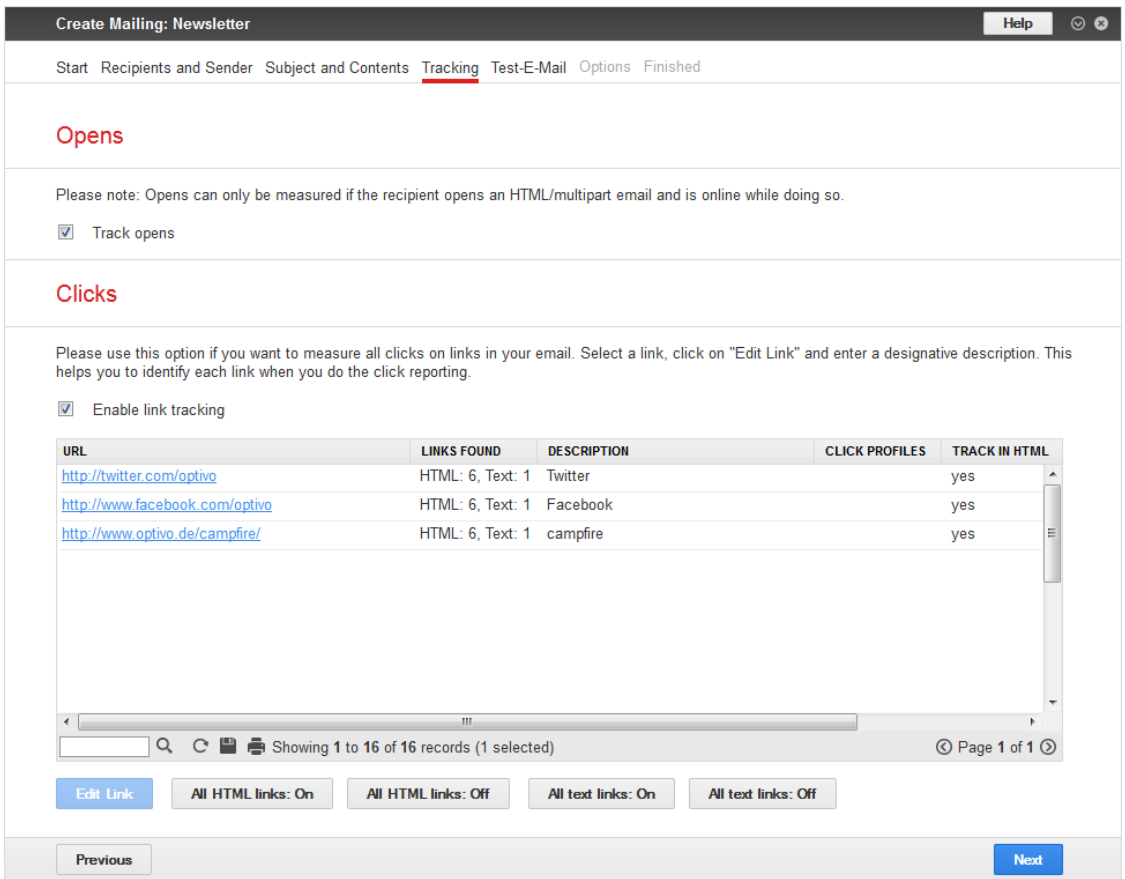
Personalized Attachments

The Personalized Attachments enables you to send individual attachments to particular recipients. Before sending, these attachments must be transmitted to Episerver Campaign using the HTTP API. The uploaded attachments can be used when sending transaction emails. Using this feature you can, for example, easily and automatically send invoices and order confirmations to your recipients. For more information see the HTTP API chapter.

Step 4 – Tracking



In this step you specify settings affecting the measurement of important parameters that determine the success of your mailings.

Opens

If you select the **Track opens** check box, Episerver Campaign will determine exactly how many recipients have opened your mailing. This number will be available in a report generated thereafter. Measurements are taken as follows: When sending your mailing, Episerver Campaign automatically builds in a reference at the bottom of each sent mail to a 1x1 pixel, transparent graphic. This reference

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also contains a unique ID for each recipient. When the recipient opens your email, the email program loads the tiny graphic from the Episerver server. During this process, Episerver Campaign receives the ID of the recipient and can thus note in the database that this user has now opened the email.

Note that this measurement is only possible if the user opens an HTML mail (text mails do not allow for the integration of graphics) and is online at the time of opening—otherwise no graphics are loaded. For this reason, you should not perceive the rate of opens as absolute, but rather as relative. If, for example, the open rate doubles from one mailing to the next, chances are good you have selected an enticing subject line.

Clicks

If you select the **Enable link tracking** check box, all clicks on links included in the mailing are recorded. This number can then be taken from a subsequent report.

Episerver Campaign displays a list that includes all the links you have used. In the **Occurrence** column you can see how many times each link was used in the text and/or HTML section. The **Description** column serves to better identify the link in subsequent reports. Because URLs can often be long and cryptic, you can enter a clear label for each link here. First mark the line you would like to modify and then click Edit link. Then enter the name of the linked page in the description field (such as Homepage, Order form, etc.). To save the changes, click Apply.

The **HTML** on or **Text on** column enables you to determine whether or not to record the clicks for each individual link and for each content type (Text/HTML). Normally it is useful to track each link in HTML email. In plain text emails, though, you may want to keep your URLs clean and readable instead of transforming them into cryptical tracking links. For example, in the sentence "For more information click www.example.com" the link is more likely to be clicked than a tracking link consisting of cryptical symbols and numbers.

Click profiles

In the **Click profiles** column you can assign a link to a click profile. Select a link, click Edit link and then click the **Profile** field . In the **Assign click profile** window, select one or more profiles and click OK.

Rule-based click profiles are displayed without having them assigned to the respective link, since they are assigned automatically. You may add more profiles, though, to those rule-based profiles. Rule-based profiles cannot be removed from a link, they are assigned to, but you can assign a link that does not match the rule to the profile based on this rule.

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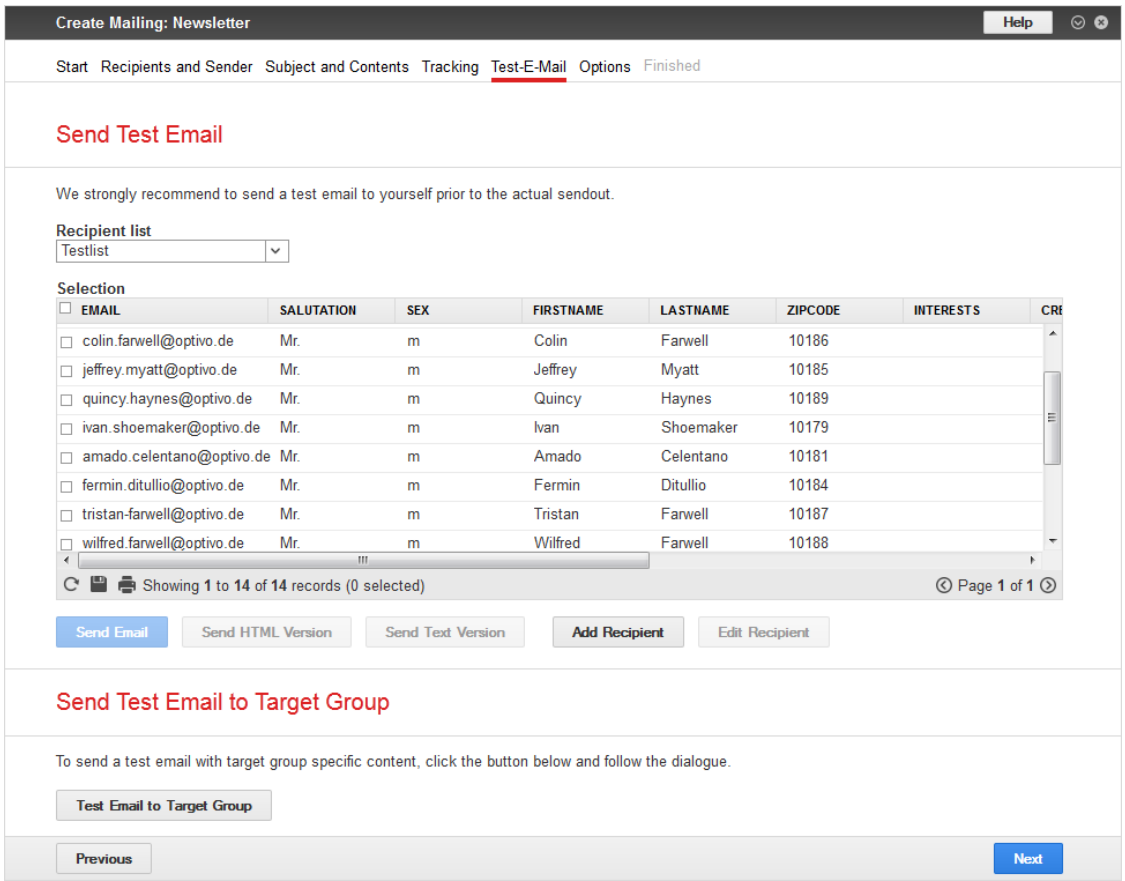
Step 5 – Test email



Before sending off any mailings, you should always send a test mail first. In this step you will therefore be shown all the test lists that have been configured for your account. Normally there is only one list, which includes the recipients that can receive a test mail (you, your co-workers, superiors etc.).

When you select a test list, all the recipients in this list are displayed below.

You can add a recipient to the list at any time by clicking Add recipient.

To send a test email, select the persons to whom the test mail should be sent by selecting the corresponding check boxes and click either

- Send email sends a multipart message
- Send HTML version sends a HTML message
- Send text version sends a text message

The test email is sent out in the respective format. If your default sending format is **Text** or **HTML**, you cannot send out a multi-part test email. We recommend, though, that if your default format is **Multipart**, to test all three options, since usually your email client does not let you decide, whether you want to

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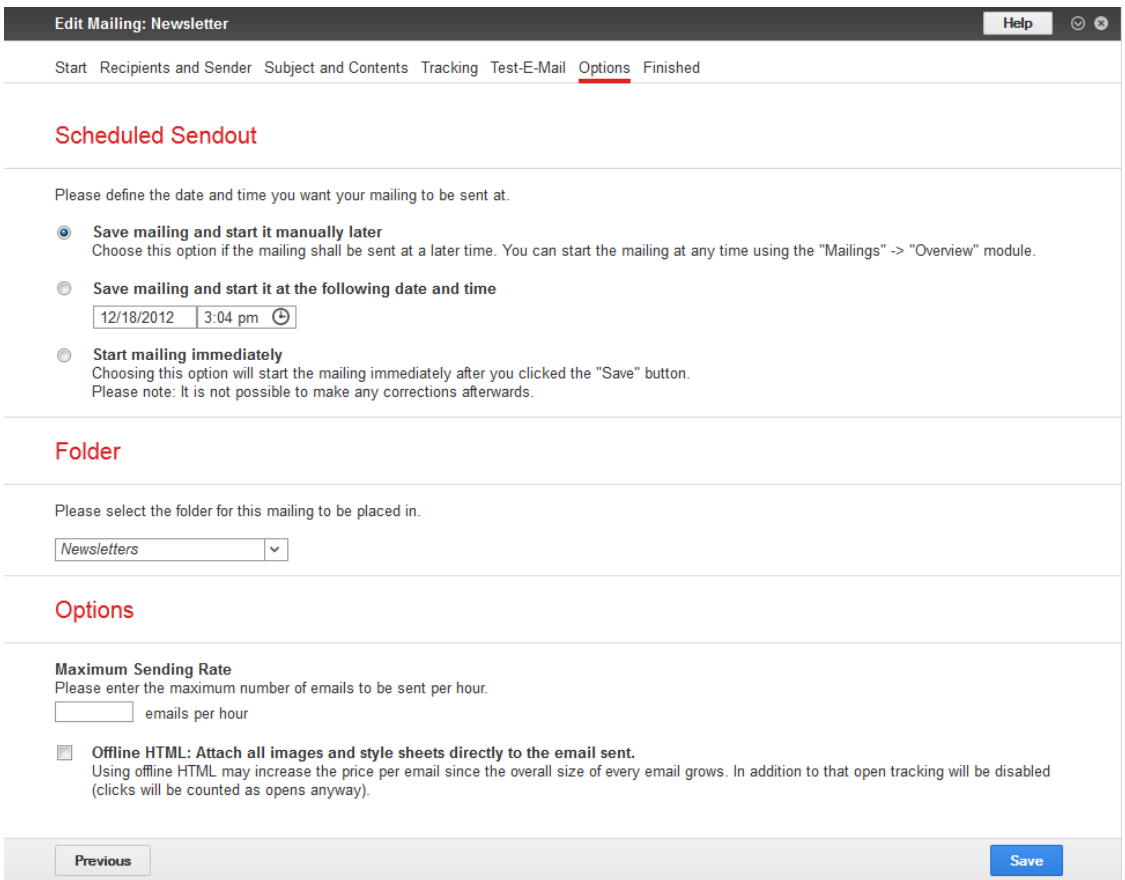
receive a multi-part email as plain text or HTML. Thus, you can explicitly test all versions of your mailing.

Click Test email to target group to open a wizard that helps you to send all target group-based versions of your mailing to one or more test recipients, even if they do not match the target group criteria.

If you use a personalized subject line, make sure that your test list contains the same fields used for personalization (e.g. name). Otherwise you will always get the default subject line in your test emails, even when you send them by clicking Test email to target group. This is intended behavior, since there is no personalization field available to create a personalized subject line.

If you want to change the mailing after you received the test email, simply go back to step 3 and change the content before sending a new test mail.

Step 6 – Options



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In the **Options** tab, select the sending time and speed of the mailing. Furthermore, you can select a folder in which to save your mailing. Regardless of whether you send your mailing now or later, it will be saved in this step. If you select the option **Save mailing and start it at the following date and time** or **Save mailing and start it manually later**, you can edit your mailing until it is sent. Mailings that you start immediately, cannot be changed.

Save mailing and start it manually later

This option should be used if you, for example, are waiting for a release for your mailing, if you know that changes will need to be made, or if the time to send the mailing has not yet been determined. At any time after saving the mailing, you can call it up and change it under the **Overview** menu item.

Save mailing and start it at the following date and time

If your mailing is to be sent at a predetermined time, but you would not like to start it manually, you can set the desired start date and time here. Click the arrow next to the current date. This opens a calendar in which you can select the exact date and time. Furthermore, this option also allows you to change the mailing after it has been saved (and before the specified starting time). This is done in the **Mailings** window.

Save mailing and start with following delay after all split mailings have been sent

This option allows you to set a delay between the sending of last split mailing and the main mailing. It is helpful, for instance, to get reliable opens or click rates, since not all recipients will open and click a mailing right after they received it. The delay should be at least a couple of hours to a couple of days.

Start mailing immediately

Use this option after you have thoroughly tested your mailing and wish to proceed immediately to send it. Be aware that the mailing starts immediately after clicking Save and it is no longer possible to make corrections.

Of course it is always possible to save a mailing before you finished configuring it. In such cases, you should definitely select the **Save mailing and start it manually later** option, as this is the only way to ensure that the mailing will not be sent.

Folder

To choose a folder you want to save your mailing to, click the **Folder** field and select a folder from the list. Alternatively, click the + symbol in the status bar to create a new folder. Click OK to confirm your selection.

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Sending rate

Episerver Campaign sends emails at a rate of up to 50 million mails per hour. In some cases this can be too fast. If you have a very long mailing list and the mailing encourages your recipients, for example, to call a particular telephone number, this could end up overloading your call center. In such a case, this would be the place to set a maximum number of mails to be sent per hour.

The slowest rate you may specify is 1,000 emails per hour.

If you leave the field blank, your mailing will be sent at the highest possible speed.

Offline HTML

Using this option will attach all images and style sheets directly to the email sent. Enabling this option may lead to a better representation of your mailing within the recipient's email client but it may also result in an overall worse deliverability of your emails.

Using offline HTML may increase the price per email since the overall size of every email grows. In addition to that open tracking will be disabled (clicks will be counted as opens anyway).

Split dispatch

A split mailing (also called split-run testing, A/B testing or bucket testing) is a variation of a regular mailing where a subset of the recipients is "split off". This subset can be freely determined. Every split mailing can be edited like a regular mailing and therefore can also have a completely different look to the master mailing.

In most cases, however, only a few parameters will differ in a split mailing compared to those used in the master mailing. The purpose of split mailings is to test various emails against one another and thereby determine which version is most successful and thereby best for use as the master mailing. The most common variations include.

- **Subject line**: Test how different subject lines affect the opening rate.
- **Header image, title, intro paragraph**: Test various headers, titles and intro paragraphs.
- **Target group-specific testing**: Test a mailing or a mailing variant using different target groups (e.g. male and female recipients).
- **Time of dispatch**: Test the optimal time to send the master mailing.

Create and edit a split mailing (Mailings Classic)

To create a split, perform the following steps:

1. In the **Mailings** window, select the desired mailing - which is called the master mailing - and click Split .

✔ The **Split dispatch** window opens.

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→ 2. You have two options to create a split.
  - Click Add split (master mailing) to create an exact copy of the master mailing with the same content. Edit this mailing by changing content elements, subject line and so on.
  - Click Add split (new mailing) to create a new mailing without any content. Add the desired content as described in the chapter Mailings Classic.

✔ In the **Splits** area, you can see the new split and all existing splits of the selected master mailing. Some parameters of the split can be edited in the **Split** section in the **Split dispatch** window, including.

  - **Name**: This name is used internally. By default, the split receives the same name as the master mailing.
  - **Subject**: Enter your desired variation to test different subject lines against one another.
  - **Maximum number of recipients**: Specify the number of recipients the split should be sent to (with regard to recipients of the master mailing, in either absolute numbers or a percentage).
  - **Target groups**: Select up to three target groups for the split. For more information, see the Target groups chapter.
  - **Sending date**: You can set the dispatch date for each individual split. For more information, see the Dispatch order section .

→ 3. Click Save settings to save the new split.

✔ The split is now displayed in the mailing list. In the list, splits appear indented below the master mailing they belong to. In the Type column they are designated as **Split**. A split mailing is always associated to a master mailing, even if the master mailing is moved to another folder.

Recipients

To perform an A/B test, during which the best option between split A and B is selected and sent out as master mailing, the splits are typically sent to a subset of the total recipients. Each split can either be allocated an absolute number of recipients or a percentage of total recipients to whom the test emails will be sent. In instances where a percentage is selected, the basis is always the number of recipients calculated for the master mailing. This principle also applies if the split uses another recipient list than the master mailing.

For the selection of a subset of recipients from a recipient list two options are available.

- **Percentage**: If using this option, enter a percentage in the **Maximum recipients** field. The number of recipients will be calculated on the basis of the total number of recipients for the master mailing. If you do not use this option, enter an absolute value. If the split contains the corresponding number of recipients, it is sent to exactly that number.
- **Random**: Recipients are randomly selected from the list. If you do not use this option, emails will be sent to split recipients according to their order on the list.

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In both instances, recipients receiving one split email will not be sent another. Similarly, recipients who are on several lists will only receive one email. Episerver Campaign monitors all email addresses during dispatch to ensure that each recipient only receives one email (split or master mailing).

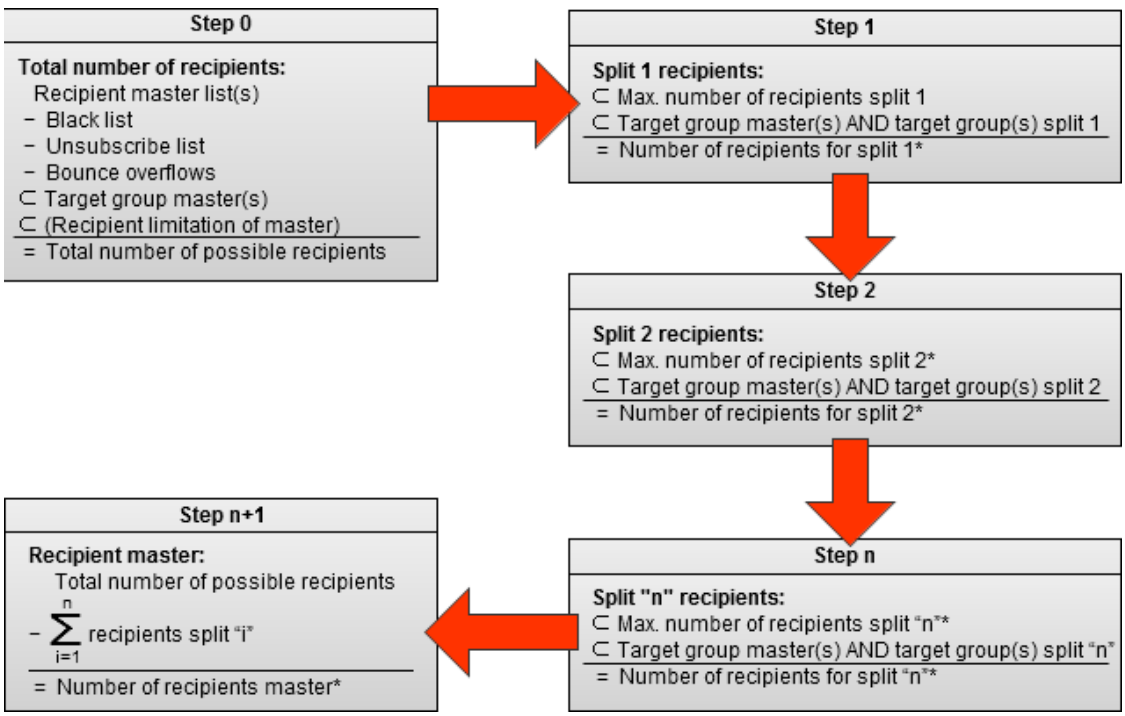
Recipient lists

In most cases, the same recipient list(s) is/are used for the master mailing and splits. It is possible, however, to use other recipient lists for a split than those used in the master mailing. In such cases, the split will be sent to recipients from this list. Take note that the recipient list of the master mailing is always the basis for calculating the number of recipients.

If you are using different recipient lists in combination with recipient data-based target groups, be aware of potential conflicts between the different recipient lists. For more information, see the Target groups chapter.

Calculating recipients

The total number of recipients (master mailing and splits) is calculated every time before a mailing – including individual splits – is sent. The following illustration shows how subsets of recipients and the total number of recipients are calculated during dispatch.



Notes on recipient calculation

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- The ⊂ symbol signifies that a subset of the total is being created.
- When a percentage is given for the number of split recipients, discrepancies between individual splits are possible as cancellations and bounce overflows are taken into account for each case. This reduces the number of possible total recipients and the correspondingly calculated percentages.
- The number of possible recipients also takes the target groups of the master mailing into account. Should a target group with the recipient list of the master mailing contain less addresses than the same target group with the recipient list of the split, then the number of recipients will be sent emails will only be that as calculated for the target group and recipient list of the master mailing.
- Should the total recipient number already be reached during the dispatch of a split, the following splits and the master mailing itself will not be sent to any recipients (see example 1 and example 2).

Target groups

Target groups used in the master mailing are inherited by the split mailings. As such, they are always applicable. Additional target groups can, however, be used in split mailings. These are linked with the target groups of the master mailing using AND logic. The number of matches of a target group in the recipient list of the master mailing furthermore determines the maximum possible number of recipients for this target group. Should the recipient list of a split contain more matching recipients for this target group, the total number of recipients sent an email will, however, not exceed the number previously calculated on the basis of the target group and recipient list of the master mailing.

Master mailing vs. split target groups

Avoid using target groups in the main and split mailings that exclude each other (e.g. "Male" and "Female"), as no recipients will then be selected for the split.

Note that the creation target groups using recipient-based criteria can only apply when the corresponding criteria is also defined as a list box. Furthermore, if using a different recipient list for the split than for the master mailing, ensure that it incorporates the same data structure as the master mailing list – or at least that the list boxes for the target group in the master mailing can also be found in the split. The description of the corresponding list boxes must be an exact match, including capitalization.

Example

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If a target group is used in the master mailing with the criteria **All recipients with interest "Football"**, then the recipient lists of both the master mailing and the split must contain a common corresponding field such as **Interests**. The field description must be identical in both lists. It also must not be **interests** in the one and **Interest** in the other.

Dispatch

→ To send a split mailing in the **Split** window, click Start split or select the check box below **Mailing schedule** and specify a dispatch date using the calendar interface.

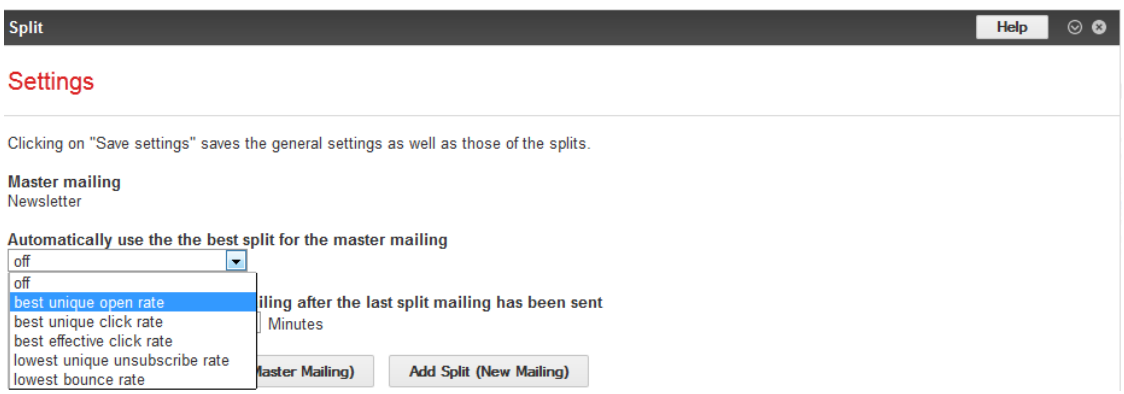
Dispatch order

The order of the splits can be set in the lower section of the **Split mailing** window. By using the arrow keys to the right of each split, their order can be changed. All splits associated with a master mailing are part of a hierarchy, which is determined by the order of the splits in the list. This split hierarchy is applied when calculating the recipients of all splits and the master mailing.

Split hierarchy vs. sending order

Note that the split hierarchy persists irrespective of the dispatch order when individual splits are manually started. For example, if the last split in a list is sent first, the recipients for all splits and the master mailing first be calculated on the basis of the overall split hierarchy. Under certain circumstances, this may lead to a split being sent to less or even no recipients despite having been started first. This is because the super-ordinate hierarchical splits (meaning those higher up on the list) have been allocated the complete number of recipients and no recipients remain for the subordinate split. Further information on this topic can be found in the Examples section. If the split dispatch is started automatically, the split mailings will be sent in the order of the split hierarchy.

Optimize and send the master mailing



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Typically, the split sending is used to optimize your mailings. If the splits have been sent, you can analyze the performance of each split and send out the best performing mailing variation as master mailing.

Episerver Campaign also offers an automatic optimization.

➜ To activate the automatic optimization, select a criterion from the **Automatically use the best split for the master mailing** drop-down menu.

The following criteria can be set for optimization.

- **Best unique open rate**: The split that has been most opened by recipients (percentage) is chosen for the master mailing.
- **Best unique click rate**: The split that has been most clicked by recipients is chosen for the master mailing.
- **Best effective click rate**: The split that has the best unique opens/unique clicks rate is chosen for the master mailing.
- **Lowest unique unsubscribe rate**: The split that has created less unsubscribes is chosen for the master mailing.
- **Highest turnover**: The split that has created the highest revenue is chosen for the master mailing. This criterion only delivers valid results, if post click tracking has been configured for your client; otherwise all splits will have the result `0`.
- **Lowest bounce rate**: The split that has created less bounces is chosen for the master mailing.

Which criterion you use for optimization depends on the mailing type, the quality of your recipient data and, of course, on your marketing goals.

There are three options to start the master mailing. If you want to start it manually, clear the check boxes and select the default option **Save mailing and start it manually later** when editing the mailing in the **Options** tab. Alternatively, you can set a sending date for sending the master mailing. Therefore, the following two options are available:

- **Sending date for the master mailing**: Use the calendar interface to set a sending date for the master mailing and select the check box to activate this option. Use this option, if you usually send your newsletter at a certain day and time.
- **Sending delay for the master mailing after the last split mailing has been sent**: Set a delay between the sending of the last split mailing and the master mailing and select the check box to activate this option. Use this option, for instance, to get reliable opens and click rates based on the split mailings, since not all recipients will open and click the mailing right after they received

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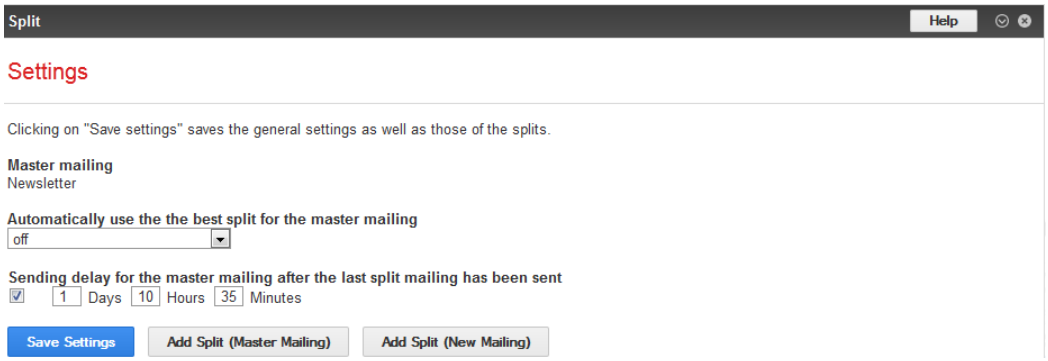
it.



Examples

The following examples show recipient calculations and their resultant particularities. They merely serve to illustrate the hierarchies and dependencies of the master mailing and splits, to provide a better understanding of the split module.

Example 1

The master mailing and splits are sent to the same recipient list. A limit on the recipient number has been set in the master mailing. The splits comprise A/B testing (split A against split B) with different target groups. The recipient list being used contains 100 recipients (40 male, 40 female, 20 unspecified). It is assumed that all recipients are valid, meaning that no one is blocked, has cancelled or exceeded the bounce limit.

Mailing	Recipient list	Max. number of recipients	Target group	Sent emails
Master mailing	A	28% (= 28 recipients)	—	0
Split 1	A	—	male	28
Split 2	A	—	female	0

The total number of recipients, as defined in the master mailing, was already reached during the dispatch of split 1. Split 2 and the master mailing did therefore not send any emails.

Example 2

Master mailing and splits are sent to different recipient lists. A limit for the total number of recipients is defined in the master mailing. Recipient list A (master mailing) contains 200 recipients (60 male, 60 female, 80 unspecified). Recipient list B (splits) contains 100 recipients (40 male, 40 female, 20 unspecified). It is assumed that all recipients are valid, meaning that no one is blocked, has cancelled or exceeded the bounce limit.

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Mailing	Recipient list	Max. number of recipients	Target group	Sent emails
Master mailing	A	28% (= 56 recipients)	-	0
Split 1	B	—	male	40
Split 2	B	—	female	16

The total number of possible recipients is jointly determined by recipient list A and the limit of recipients as defined in the master mailing. Split 1, which is only sent to male recipients and has no sending limit, is sent to all male recipients in list A. Split 2 is subsequently sent to 16 female recipients from the same list. It is at this point that the total number of recipients limit has been reached.

Example 3

The master mailing and splits are sent to the same recipient list. Recipient list A contains 100 recipients (20 male, 20 female, 60 unspecified). Three splits are created. Split 1 has the target group "male", split 2 "female" and split 3 has the target group "male OR female" (which means that a sex must to be specified). The master mailing does not define a target group. It is assumed that all recipients are valid, meaning that no one is blocked, has canceled or exceeded the bounce limit. Split 3 is to be sent first.

Mailing	Recipient list	Max. number of recipients	Target group	Sent emails
Master mailing	A	—	—	60
Split 1	A	10%	female	10
Split 2	A	10%	male	10
Split 3	A	10%	unspecified	0

While the first two target groups are subsets of the master mailing target group, the target group of split 3 and that of the master mailing group exclude one another. To select recipients who did not specify their sex, the target group of the master mailing would have needed to be "males OR females OR blank field".

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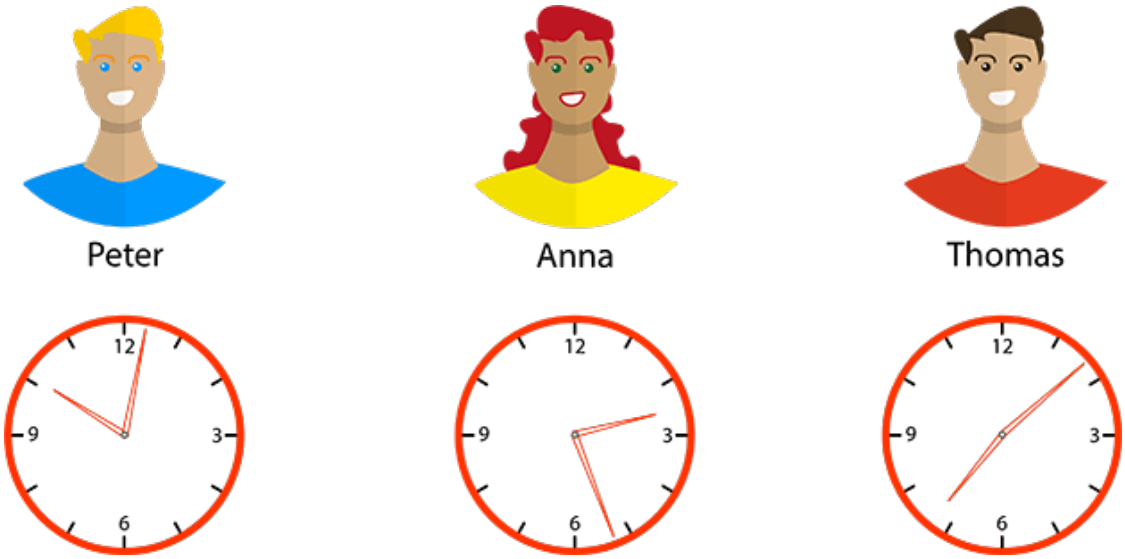
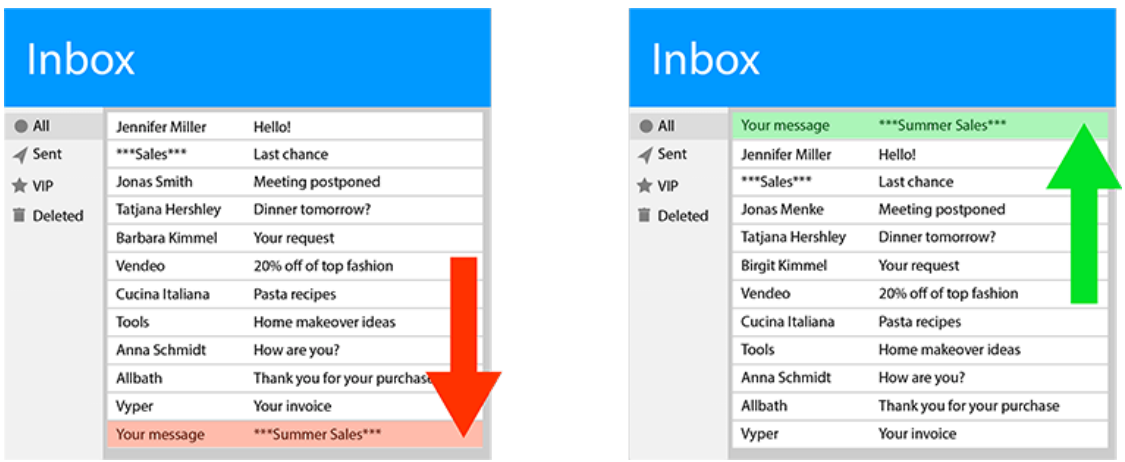
Send time optimization



Every day 269 billion emails are sent around the world. Given this flood of messages, it's not that easy to get the attention of your recipients. But what if you could delay the sending of your message until the perfect time? What if you could postpone it until the exact moment when your recipients open their inbox and read their emails? The perfect time window, at which your message appears right at the top of the inbox, as your mailing arrives during these key attention-grabbing minutes – and does not get lost in a bunch of other messages at the bottom of the inbox.



The send time optimization from Episerver Campaign allows you to achieve exactly this, by customizing the sending times of your mailings – automated for each individual recipient.

Whereas Peter the engineer reads his inbox in his breakfast break at 10 AM in the morning, teacher Anna only has time to do this after class. And the family man Thomas only has time to tend to his

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emails once he has put the kids to bed. Indeed, he has been checking his inbox repeatedly throughout the day on his smartphone, but he finds that it is only in the evening when there is enough peace and quiet to read through his emails.

That's not a problem. Our send time optimization ensures that messages are delivered automatically in accordance with the daily routines of your recipients. This additional feature of Episerver Campaign detects when recipients actually check their inbox, and it sends your message to each individual at their own customized time that matches the rhythms of their everyday life.

As a marketer, you benefit from the undivided attention of your recipients, which allows you to increase your return on investment. The send time optimization can increase the open rate for your messages by up to 25 percent.

Why should you automate optimization?

Many marketers follow three simple rules to determine the best send time for their campaigns. These times are based on the findings of various studies:

1. Accordingly, Tuesday is the best day to send out mailings. Thursdays and Wednesdays are the next best days (the response rate by recipients is the highest in most industries on these days).
2. In the morning around 10 AM is better than in the early morning or in the afternoon and evening (recipient responses are the highest at this time for most industries).
3. Workdays are better than weekends (no one wants to be disturbed by advertising on Saturdays or Sundays, or at least so goes the assumption).

There is nothing wrong with these rules per se. They are based on many studies and billions of data sets. However: The rules are derived from average values, and they do not take into account the preferences of each individual recipient (and they also do not apply to every industry).

An office worker may read their emails in his breakfast break at 10 AM, and a night nurse or bartender will have different daily routines. And if you spend your work week struggling through masses of emails at your job, you may be more receptive to reading personal messages on a Sunday – assuming that your inbox is not overflowing.

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Do not rely on average values or the assumption that "one size fits all" – rather learn about the particular lifestyles of your customers. In short: Do not try to peg your recipients to certain send times. Rather, make your send times accommodate the preferences of your recipients.

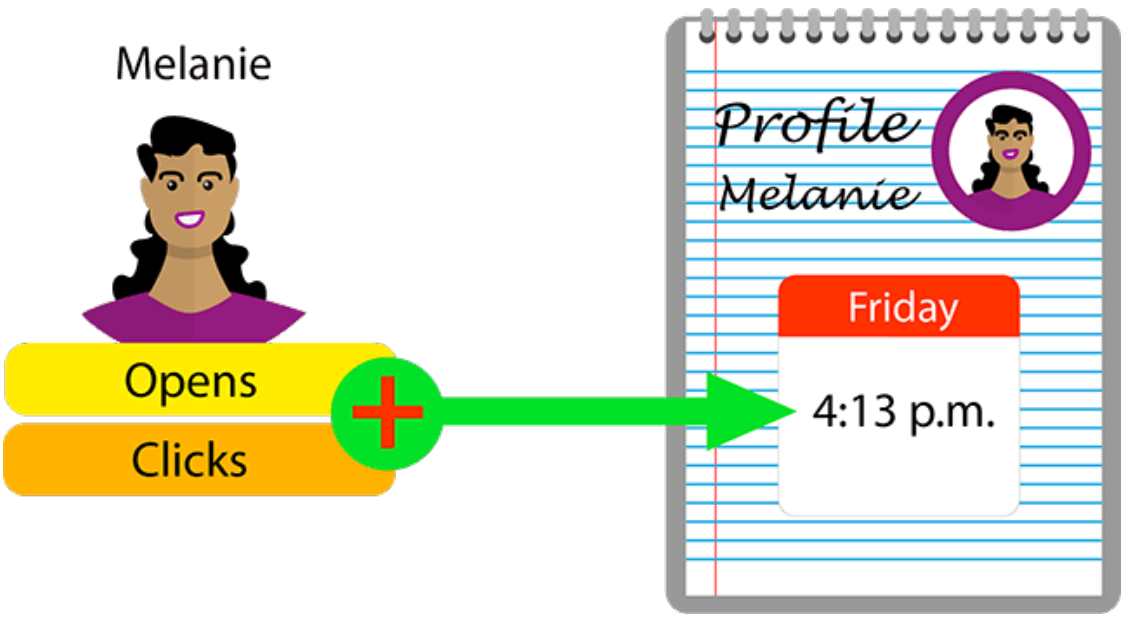
How it works

The send time optimization creates a personal profile for each of your recipients and then analyzes the response behavior of each individual recipient. Machine learning: The longer the customer relationship, the more accurate the optimized send time. And if a recipient changes their behavior, their profile will be updated accordingly.

The self-learning algorithm also takes both click behavior and message opens into account. The reason: Opens by themselves do not provide sufficient evidence of whether a recipient is actually interacting with their inbox. This also has to do with the fact that user behavior has changed with the use of mobile devices.

Around 70 percent of users now own a smart phone, and they reach for it an average of 88 times a day. Often, however, it is only to check their inbox or to quickly open a message if only to get their unread message count down to zero. However, when users check messages they are much less likely to read emails in depth or to follow interesting links.

Therefore, Sent time optimization takes the click behavior of your recipients into account to determine the optimal send time when your recipients are actually focused and responsive and not just clicking off a notification.



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Overview of benefits

- You can increase the open rate for your emails by up to 25 percent.
- You will decrease the likelihood that your message will go unnoticed.
- Your advertising messages will be perceived as less obtrusive.
- The service adjusts to the recipient's behavior, and it changes the send time when the recipient changes their habits.
- It is convenient to use because the send time optimization is automated.
- It has a low learning curve. The feature integrates with the already familiar standard features of Episerver Campaign.
- It is highly flexible: the send time optimization is virtually infinitely adjustable for up to 7 days.
- A fallback time can be set for new recipients for whom behavioral data is not yet available.
- Available for Smart Campaigns (including A/B tests).
- Analysis function to evaluate individual send times.

Setup

➜ To set up send time optimization, contact the Episerver customer support team.

✔ If the send time optimization is enabled for you, you will find the feature as an extension:

- in the **Wait** node for Smart Campaigns
- in the **A/B test** node for Smart Campaigns
- in the campaign analysis

Using send time optimization

The following topics describe how to configure send time optimization for your Smart Campaigns in the Wait node and in the A/B test node. The Analysis: Send time optimization overview section describes how to graphically display, understand, and analyze the distribution spread of the send times and the peak sending times.

Send time optimization in the Wait node

This topic shows how to enable and configure the send time optimization in the **Wait** node within Smart Campaigns.

Currently the send time optimization feature is only available for the **Email** channel.

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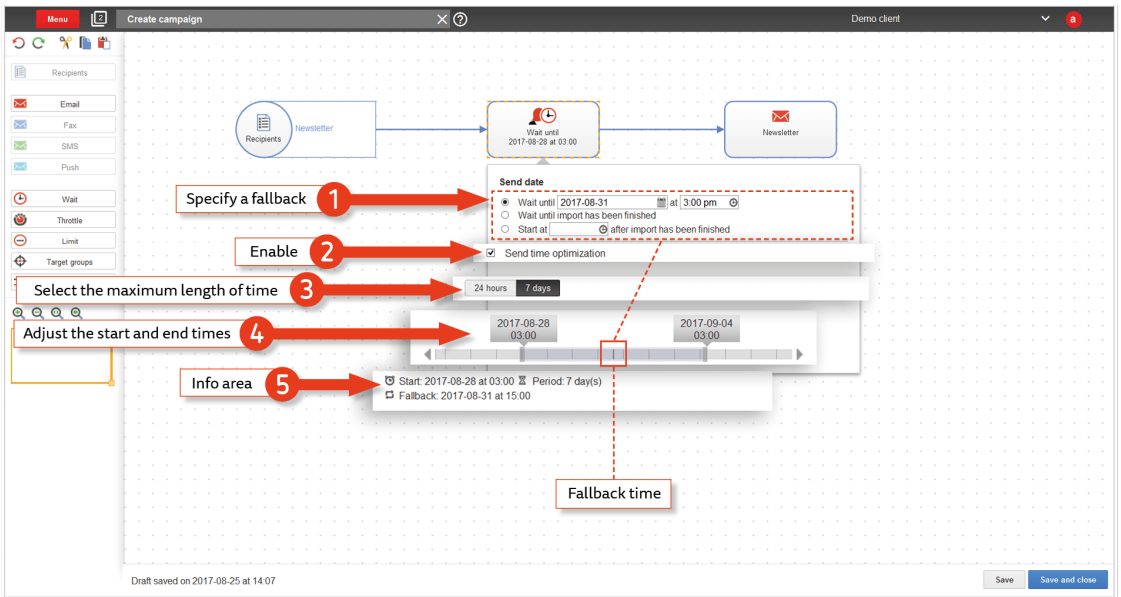
Overview of the configuration steps



To configure the send time optimization in the **Wait** node, follow these steps:

1. Under **Send date** specify a fallback.
2. Enable the send time optimization.
3. Select the maximum length of time for the send time optimization.
4. Adjust the start and end times of the send time optimization and, if necessary, shorten the preset maximum length.
5. Check your settings in the info area.

Specify a fallback time

If there is no or only insufficient data about individual recipients to determine a personalized send time, your message will be sent to these recipients at the set fallback time. To specify a fallback time, perform the following steps:

→ 1. In the **Create campaign** window or the **Edit campaign** window within Smart Campaigns, drag a **Wait** node from the left action pane into the workspace between the **Recipients** node and the **Email** node.

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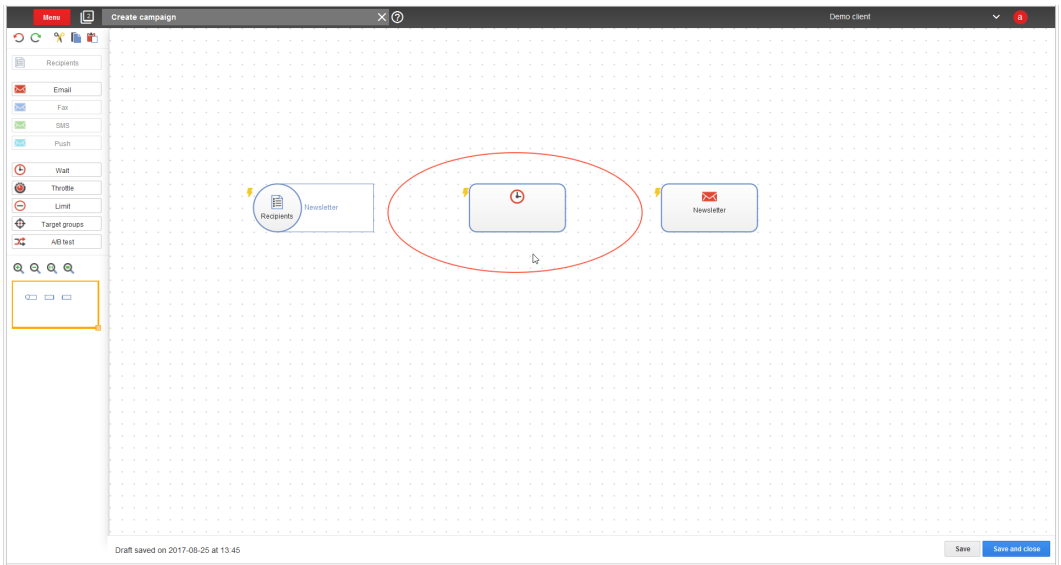
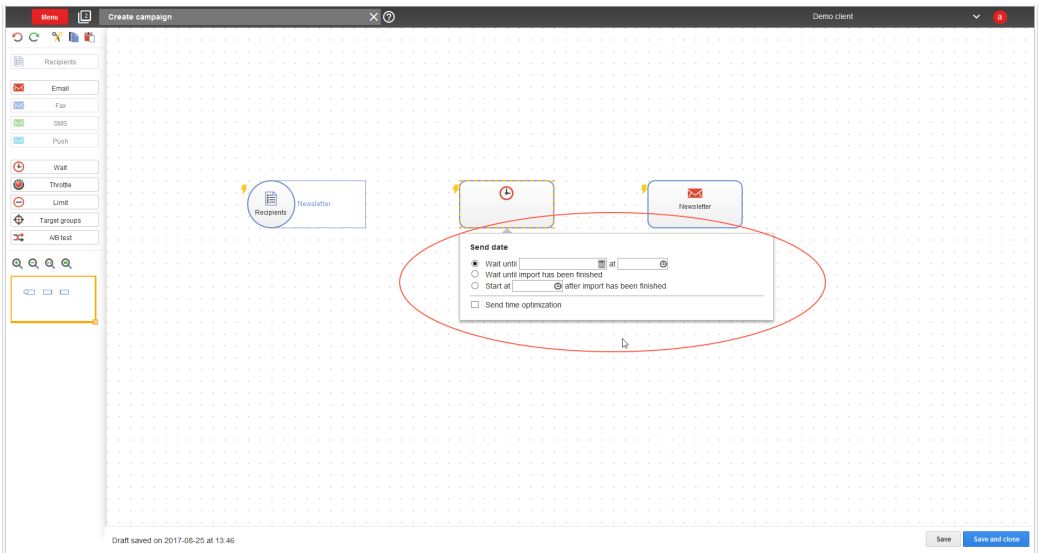


✔ A context menu opens.



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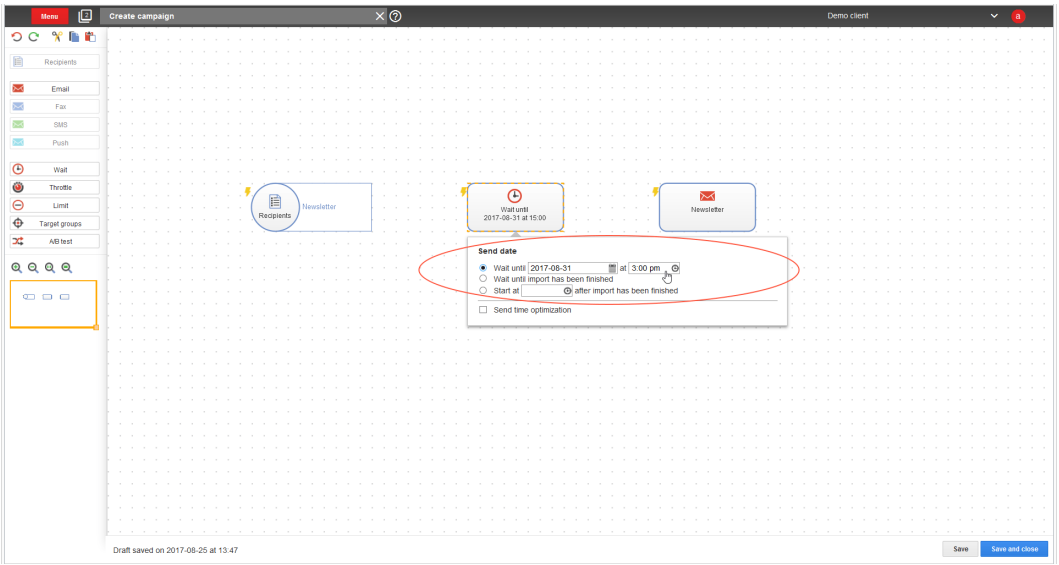
2. Under **Send date**, select an option and specify the fallback time.



Option	Description	Configuration
Wait until ...	The fallback time is set to a fixed time.	Specify a date and a time.
Wait until import has been finished	The fallback time is set to the time immediately after the recipient import is completed.	no configuration step is needed
Start at ... after import has been finished	The fallback time is set to a fixed time after the recipient import is completed.	Specify a time.

The **Wait until import has been finished** and **Start at ... after import has been finished** options are only available if the closed loop interface was configured in your client. If the closed loop interface was not configured in your client, only the **Wait until ...** option is available.

If the **Wait until import has been finished** or **Start at ... after import has been finished** option is selected, you will no longer be able to enable the campaign.

✔ You have successfully set a fallback time for all recipients for whom there is no or only insufficient data to determine a personalized send time.

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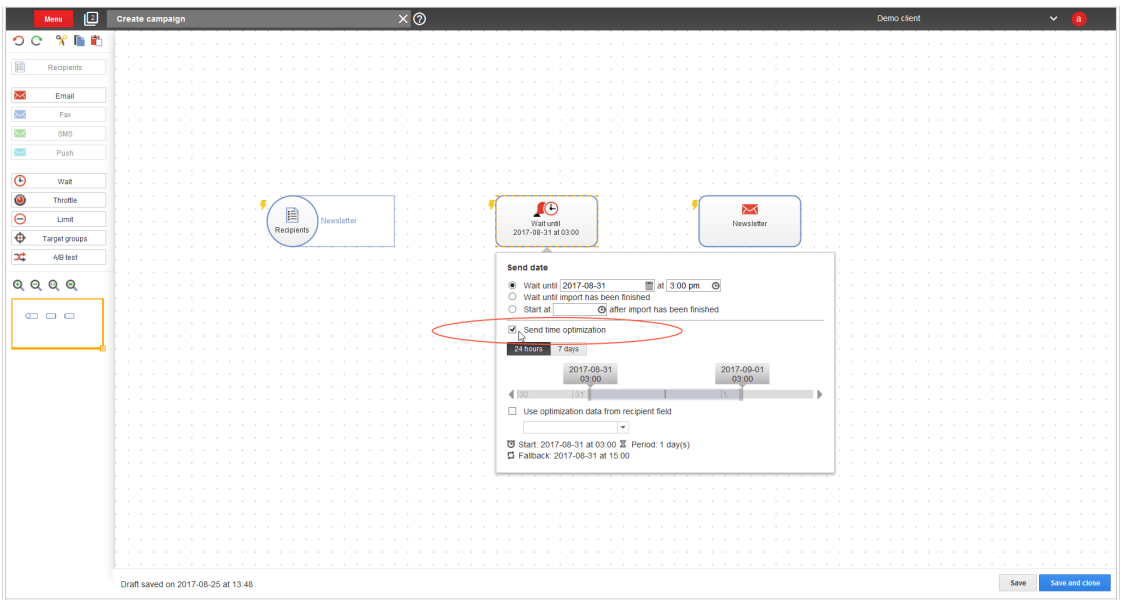
Enable the send time optimization

Enable the send time optimization feature after setting the fallback time:

➜ In the context menu, select the check box next to **Send time optimization**.



✔ You have successfully enabled the send time optimization. The context menu in the **Wait** node will now include:

- options for maximum length (24 hours or 7 days)
- a date slider
- an info area

Set the maximum length of time

Set the maximum length of time that Episerver Campaign can use to optimize the sending of your message:

➜ Click `24 hours` or `7 days`.

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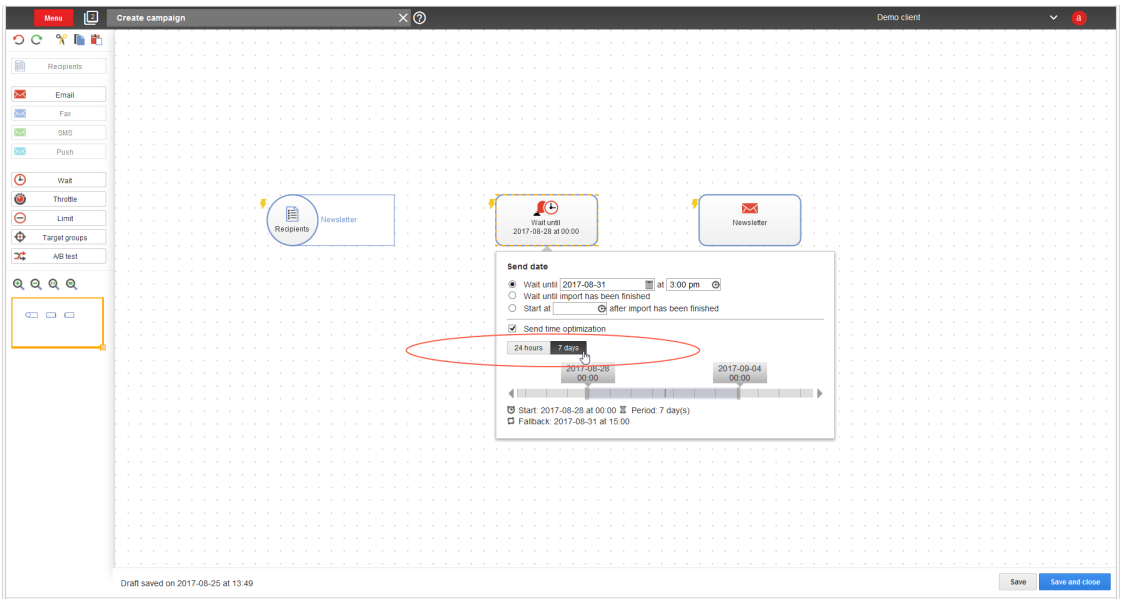
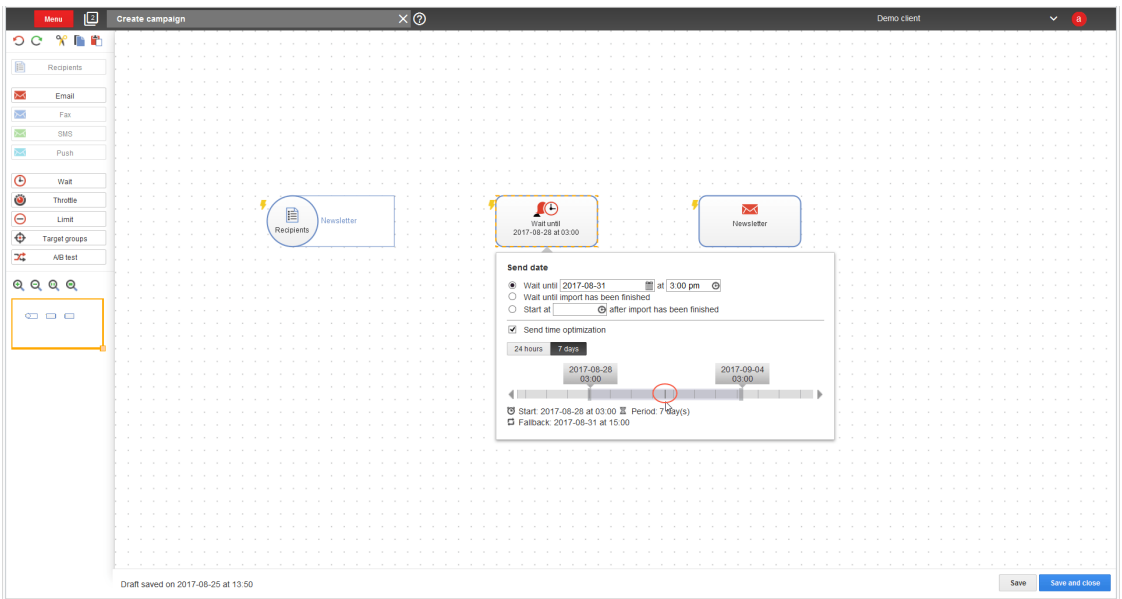


✔ You have successfully set a maximum length of time.

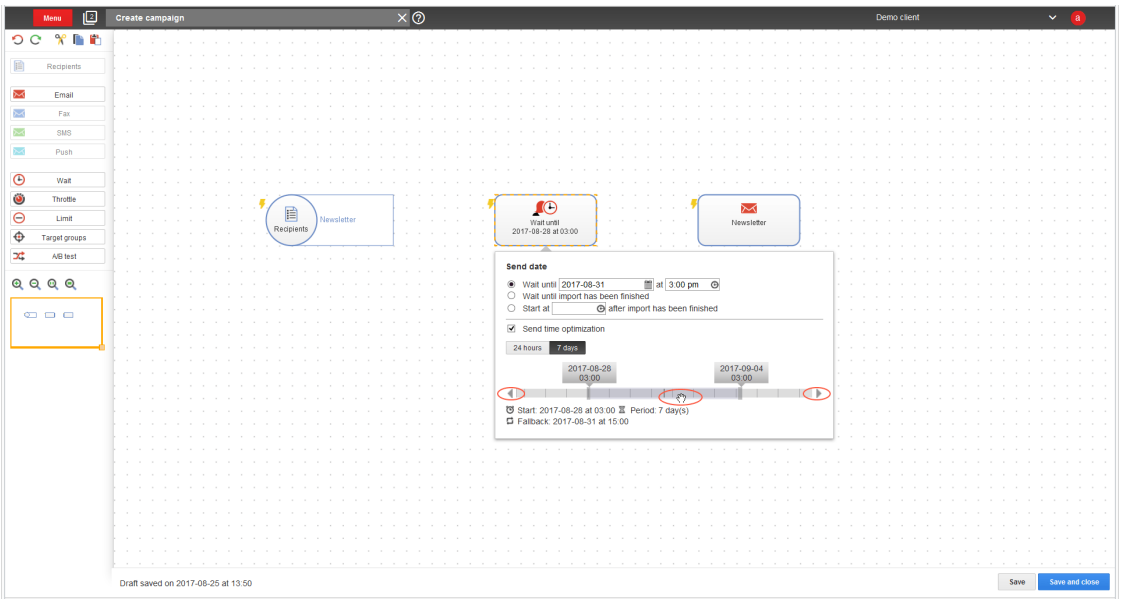
Adjust the start and end times

You can flexibly adjust the start and end times of the send time optimization in 15-minute increments. The fallback date that you set is the most important setting. If you do not make any changes, the start and end times are set to the fallback date; this fallback date is the midpoint of the selected maximum length of time.

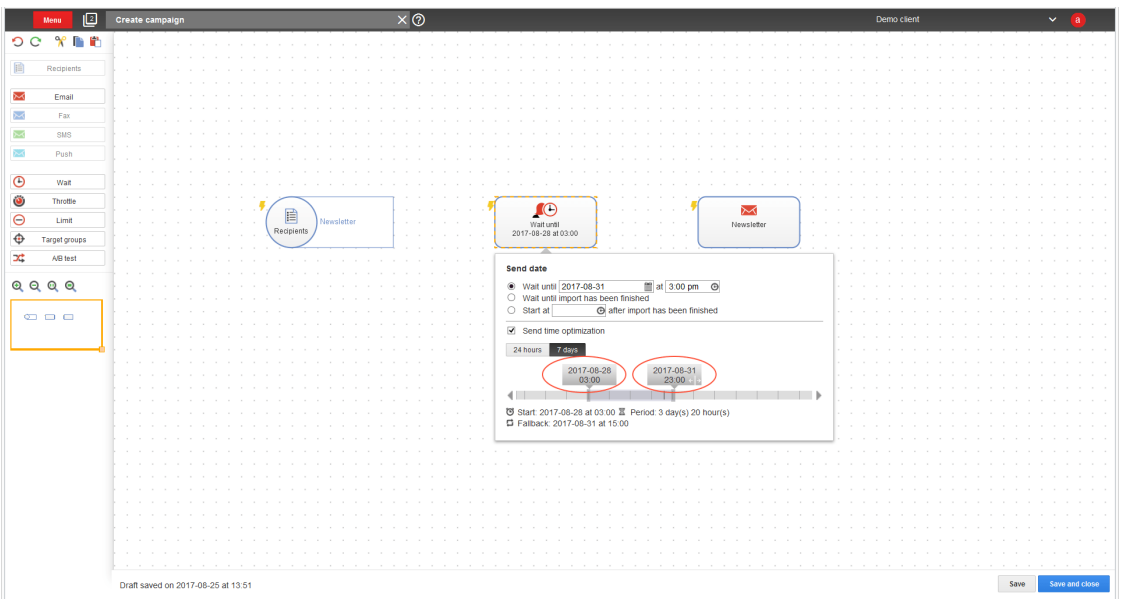


© Episerver 2018

To adjust the start and end times without changing the maximum length of time, click the arrow keys on the sides of the date slider or adjust the slider using the mouse (your mouse pointer will automatically turn into a grasping hand).



If you want to adjust the start and end times and reduce the maximum length of time, click and grab the corresponding date tab with the mouse.



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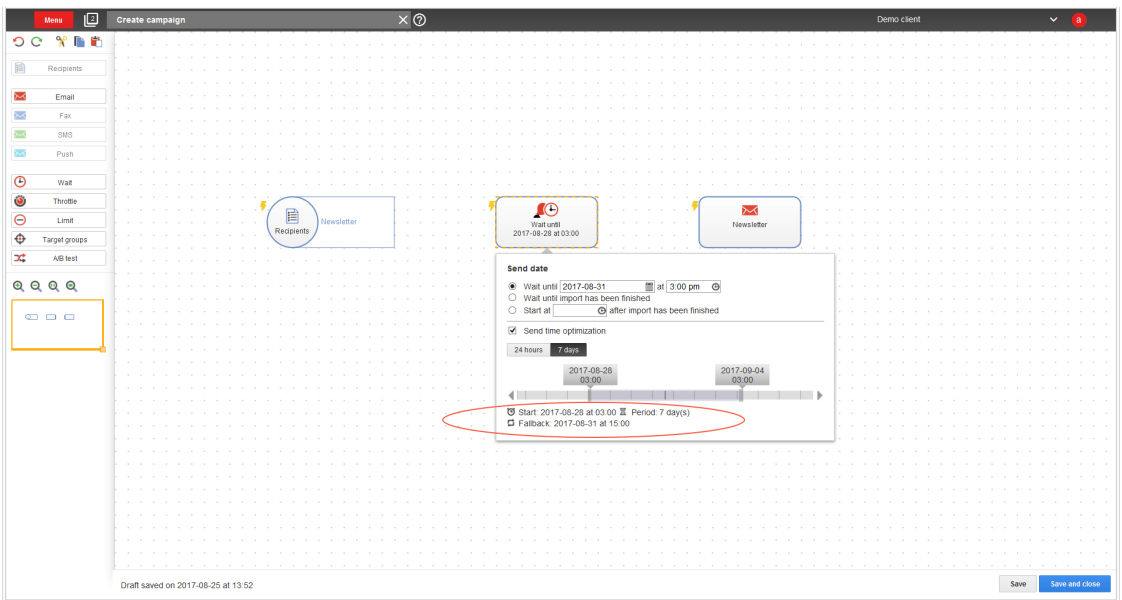
You can flexibly adjust the 24 hours and 7 days defaults downwards and shorten the maximum length of time from 7 days to 3 days, for example, if this is necessary for editorial purposes and for short-term promotions.

Check the settings in the info area

You can find your current send time optimization settings in the info area.

→ After completing the configuration, check to see that the settings you set are displayed in the info area, and change your settings if necessary.



✔ You have successfully configured the send time optimization. Your message will be sent to all recipients for which sufficient behavioral data are available at a personalized send time in accordance with your configuration. Recipients for whom there is no or only insufficient behavioral data, will receive your message at the configured fallback time.

Send time optimization in the A/B test node

In this section, you will learn how to enable and configure the send time optimization in the **A/B test** node within Smart Campaigns.

Currently the send time optimization feature is only available for the **Email** channel.

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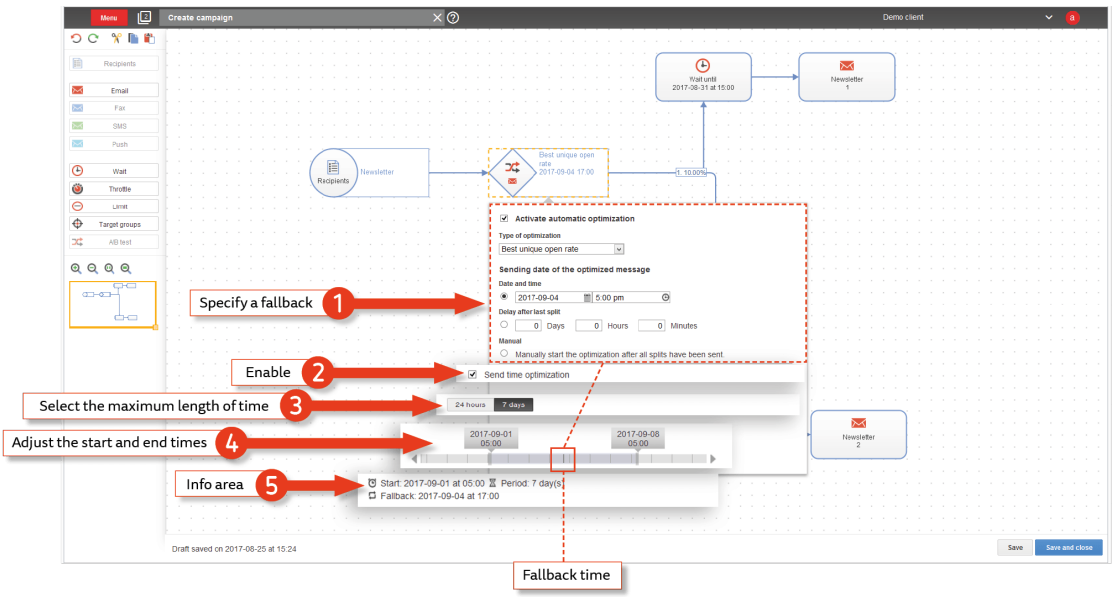
The send time optimization in the **A/B test** node is only used to determine the personalized send time of the **optimized message** (the so-called "main mailing"). If you would like to optimize the time of sending of individual split mailings, use a separate **Wait** node for each split mailing and configure the send time optimization in the Wait node.

At the end of this section, you will find examples with figures illustrating which node you need for which scenario (an **A/B test** node and/or a **Wait** node):

1. You want to configure send time optimization only for the optimized message (the so-called "main mailing").
2. You want to configure send time optimization only for split mailings.
3. You want to configure send time optimization for both split mailings and the optimized message.

Overview of the configuration steps



To configure send time optimization in the **A/B test** node, perform the following steps:

1. Under the **Send date** specify a Fallback time.
2. Enable the send time optimization.
3. Select the maximum length of time for the send time optimization.

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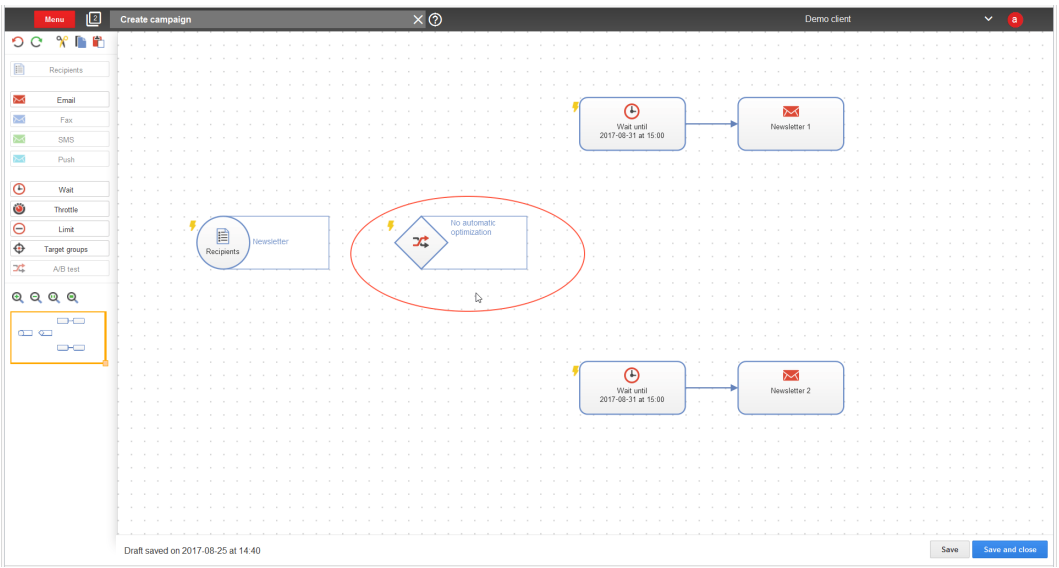
4. Adjust the start and end times of the send time optimization and, if necessary, shorten the preselected maximum length.
5. Check your settings in the info area.

Specify a fallback time

If there is no or only insufficient data about individual recipients to determine a personalized send time, your optimized message will be sent to these recipients at the set fallback time. To specify a fallback time, perform the following steps:

1. In the **Create campaign** window or the **Edit campaign** window within Smart Campaigns, drag an **A/B test** node from the left action pane into the workspace between the **Recipients** node and the **Wait** node/**Email** node.



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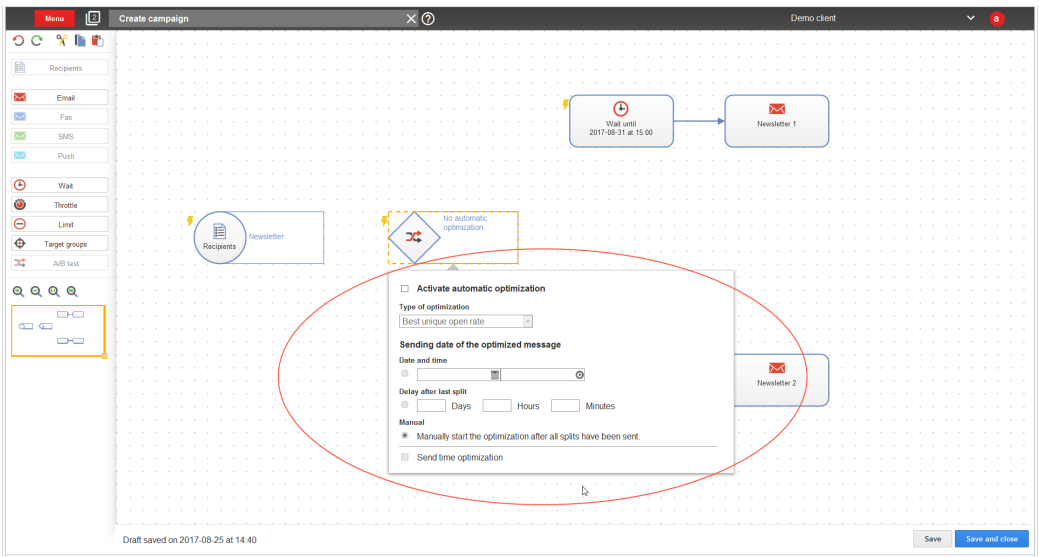
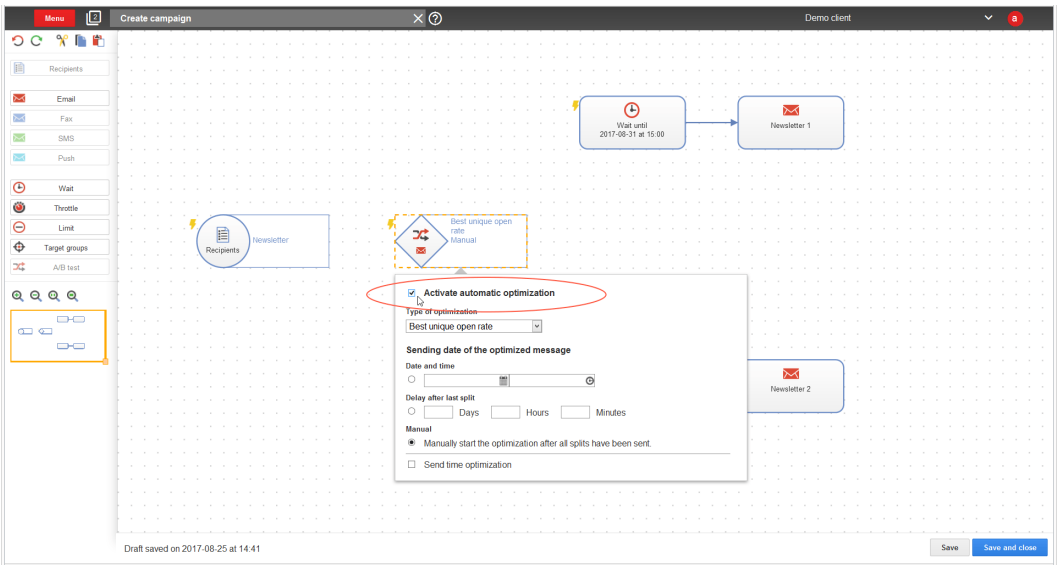
✔ A context menu opens.



➜ 2. Enable automatic optimization by selecting the check box next to **Activate automatic optimization**.



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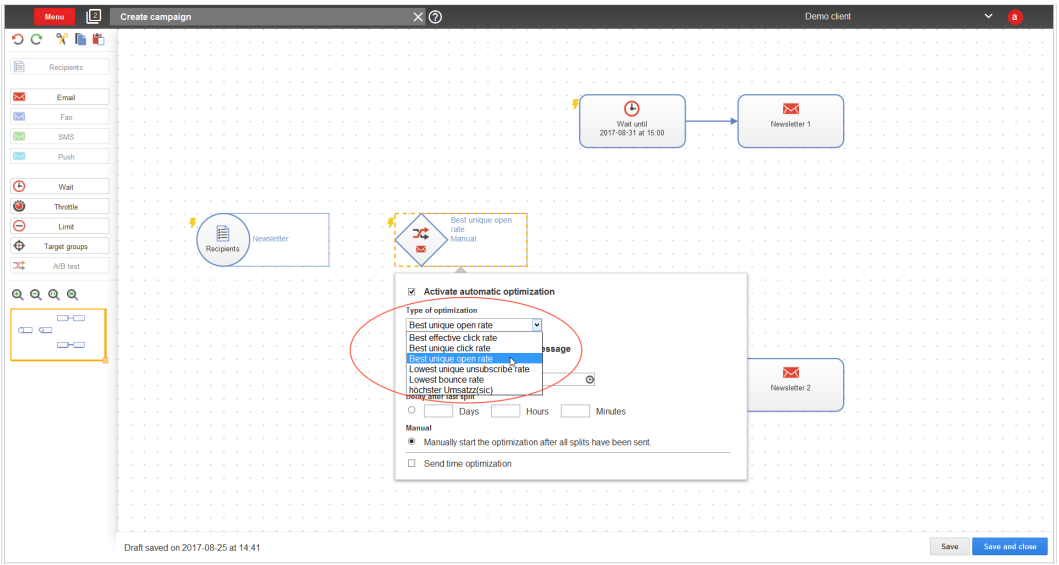
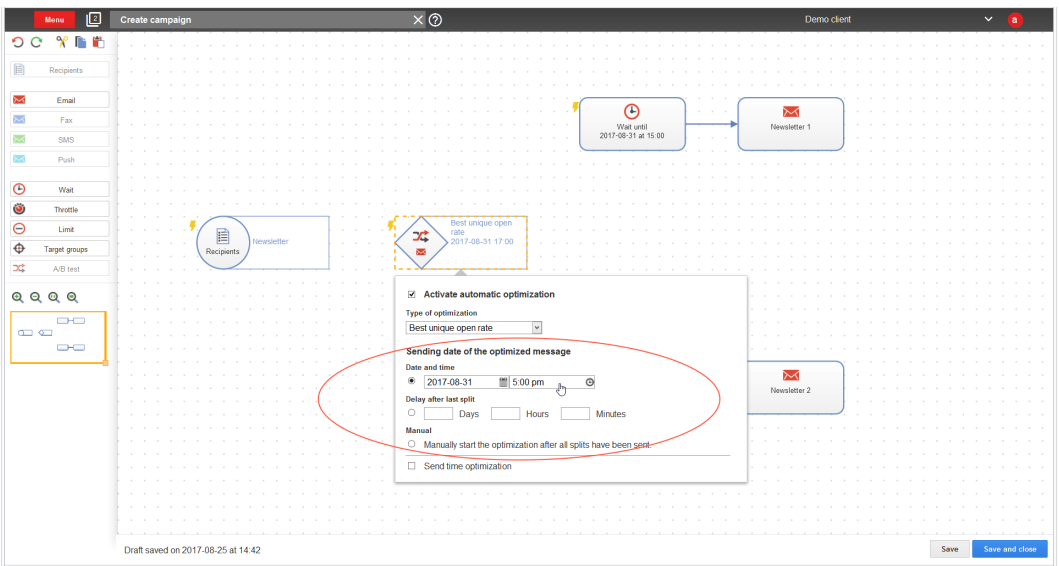
3. In the drop-down list, select the type of optimization.



4. Under **Sending date of the optimized message**, select an option and specify the fallback time.



Option	Description	Configuration
Date and time	The fallback time is set to a fixed time.	Specify a date and a time.
Delay after last split	The fallback time is set to the time immediately after the delay.	Specify the delay time.

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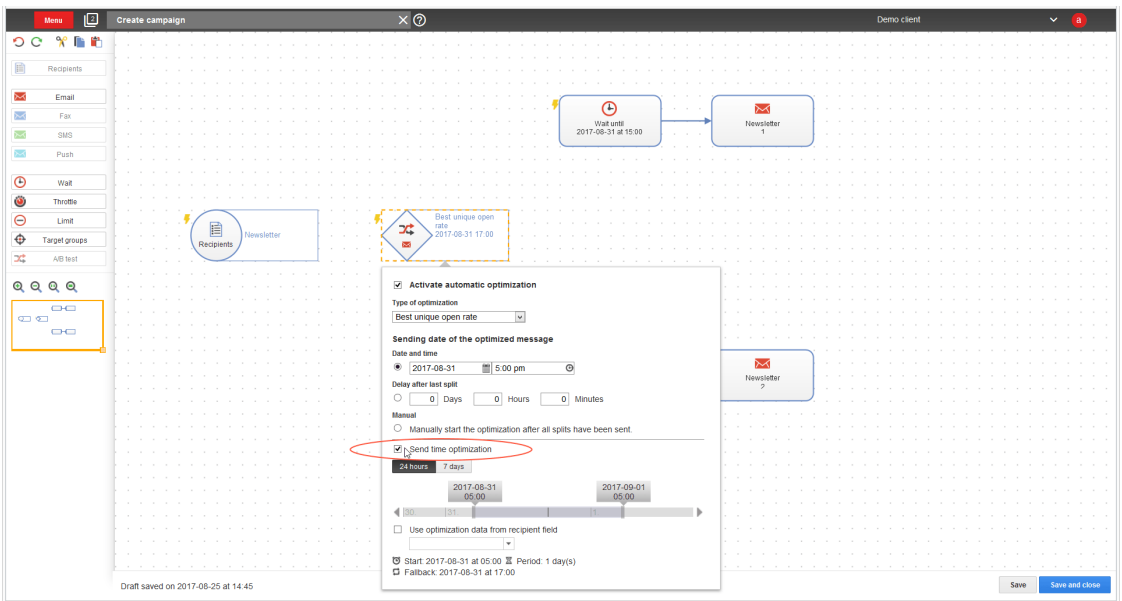
Option	Description	Configuration
Manual	The fallback time is set to the manual start time.	no configuration step is needed

✔ You have successfully set a fallback time for recipients for which there is no or only insufficient data to determine a personalized delivery time.

Enable the send time optimization

Enable the send time optimization feature after setting the fallback time:

➔ In the context menu, select the check box next to **Send time optimization**.



✔ You have successfully enabled the send time optimization. The context menu will now include:

- options for the maximum length of time (only for the fallback **Date and time**)
- a date slider
- an info area

Set the maximum length of time

Set the maximum length of time that Episerver Campaign can use to optimize the sending of optimized messages/main mailings:

➔ Click 24 hours or 7 days .

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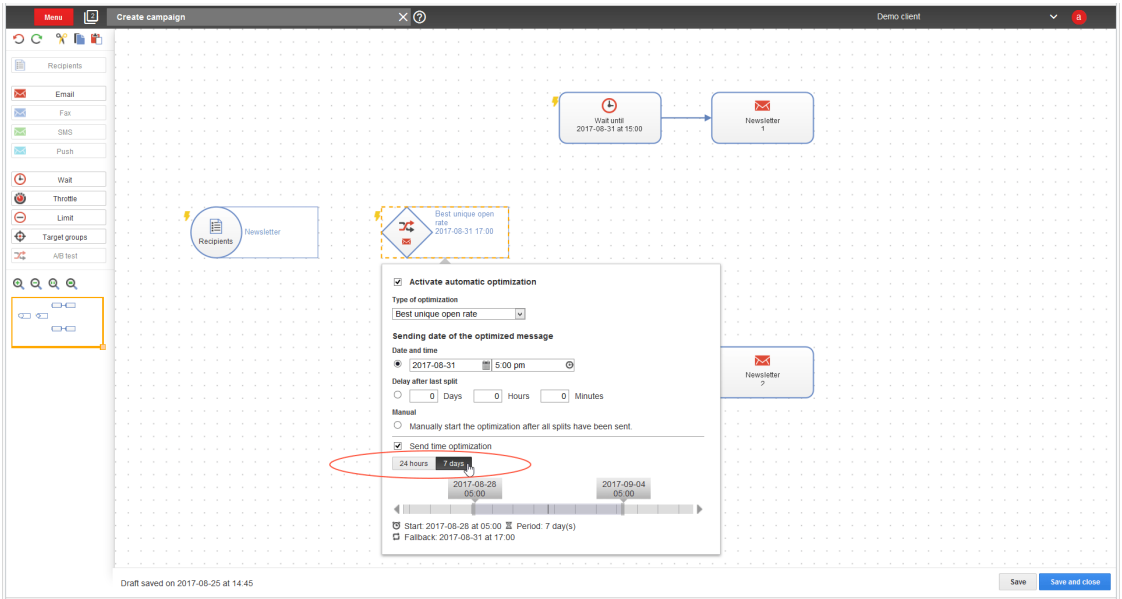

✔ You have successfully set a maximum length of time.

Adjust the start and end times

You can flexibly adjust the start and end times of the send time optimization in 15-minute increments. The fallback date that you set is the most important setting. If you do not make any changes, the start and end times are set to the fallback date; this fallback date is the midpoint of the selected maximum length of time.

➜ To adjust the start and end times without changing the maximum length of time, click the arrow keys on the sides of the date slider or adjust the slider using the mouse (your mouse pointer will automatically turn into a grasping hand).

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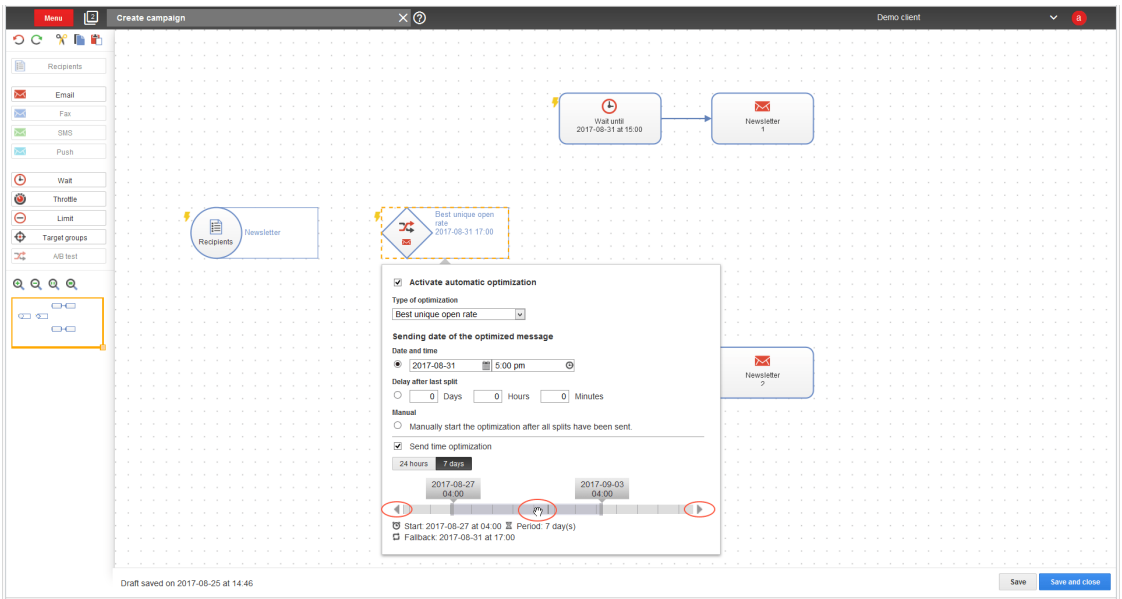
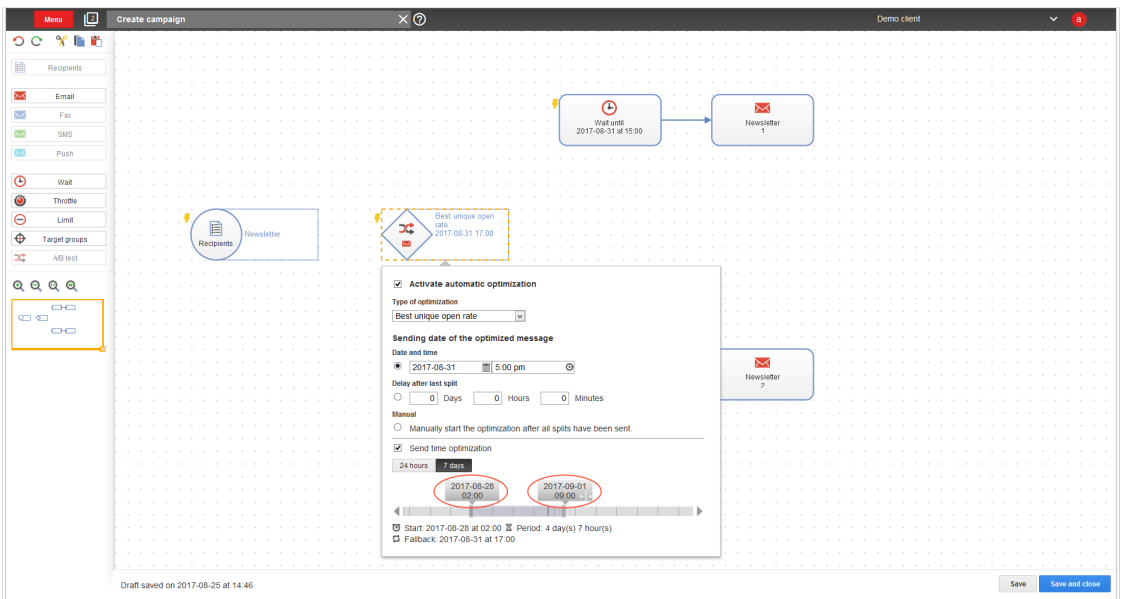


If you want to adjust the start and end times and reduce the maximum length of time, click and grab the corresponding date tab with the mouse.



You can flexibly adjust the `24 hours` and `7 days` defaults downwards and shorten the maximum length of time from 7 days to 3 days, for example, if this is necessary for editorial purposes and for short-term promotions.

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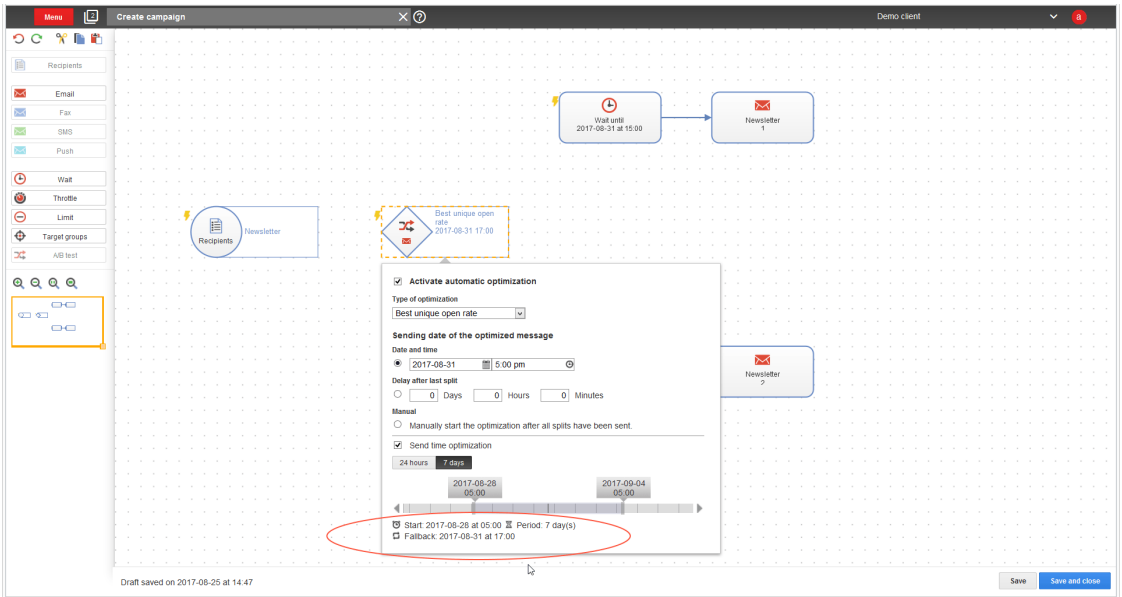
Check the settings in the info area

You can find your current send time optimization settings in the info area.

➜ Always check your specified configuration in the info area, and change your settings if necessary.



✔ You have successfully configured the send time optimization. The optimized messages or main mailings will be sent to all recipients for which sufficient behavioral data are available at a personalized send time in accordance with your configuration. Recipients for whom there is no or only insufficient behavioral data will receive the optimized message or main mailing on the configured fallback date.

Examples

The send time optimization can be configured in one of three ways for an A/B test:

1. You want to configure a send time optimization only for the optimized message (main mailing).
2. You want to configure a send time optimization only for split mailings.
3. You want to configure a send time optimization for both split mailings as well as for the optimize message.

Only optimized message/main mailing

If you only want to configure the send time optimization for the optimized message or the main mailing, then you should configure the send time optimization only in the **A/B test** node.

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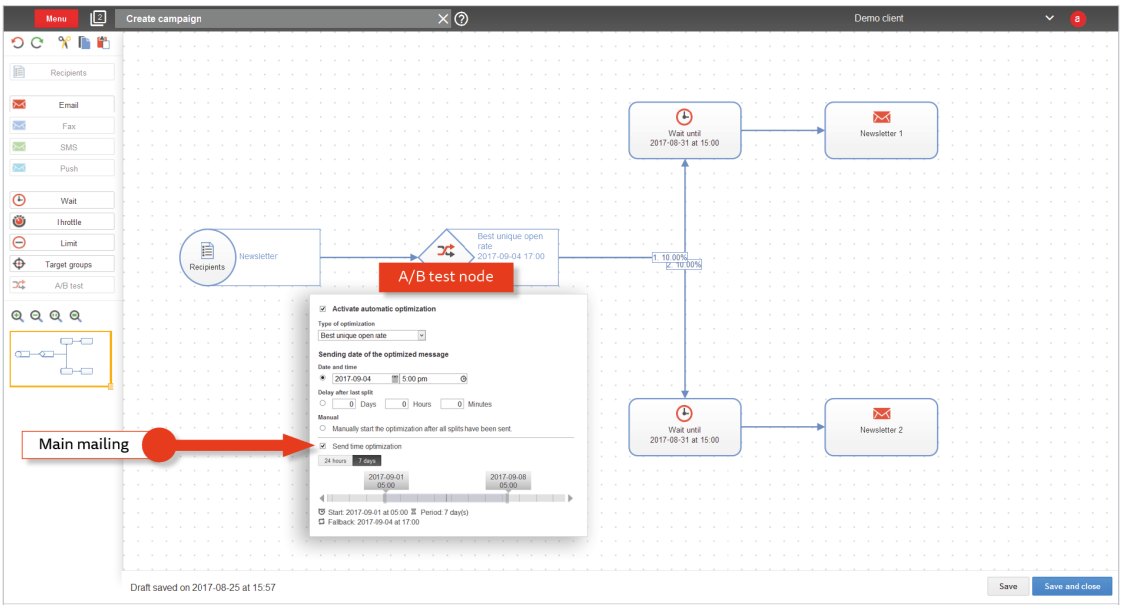
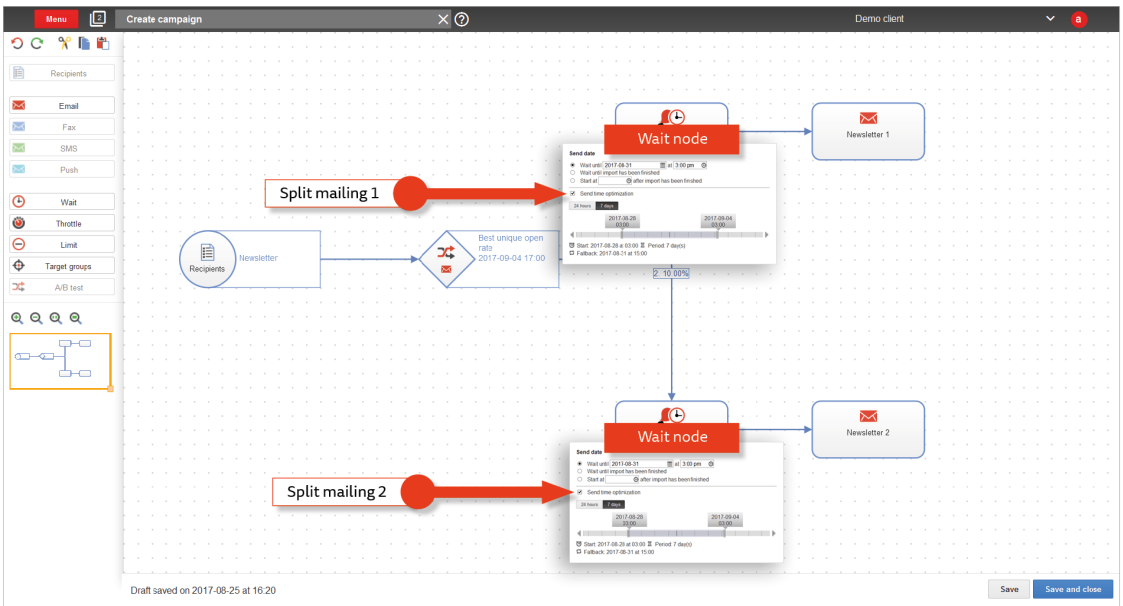


Only split mailings

If you would like to send split mailings using a send time optimization, use a separate **Wait** node for each split mailing and configure the send time optimization in each **Wait** node.



Both split mailings and optimized message or main mailing

If you want to configure a send time optimization for both split mailings and the optimized message or main mailing, you need to configure the send time optimization in the **A/B test** node as well as in the

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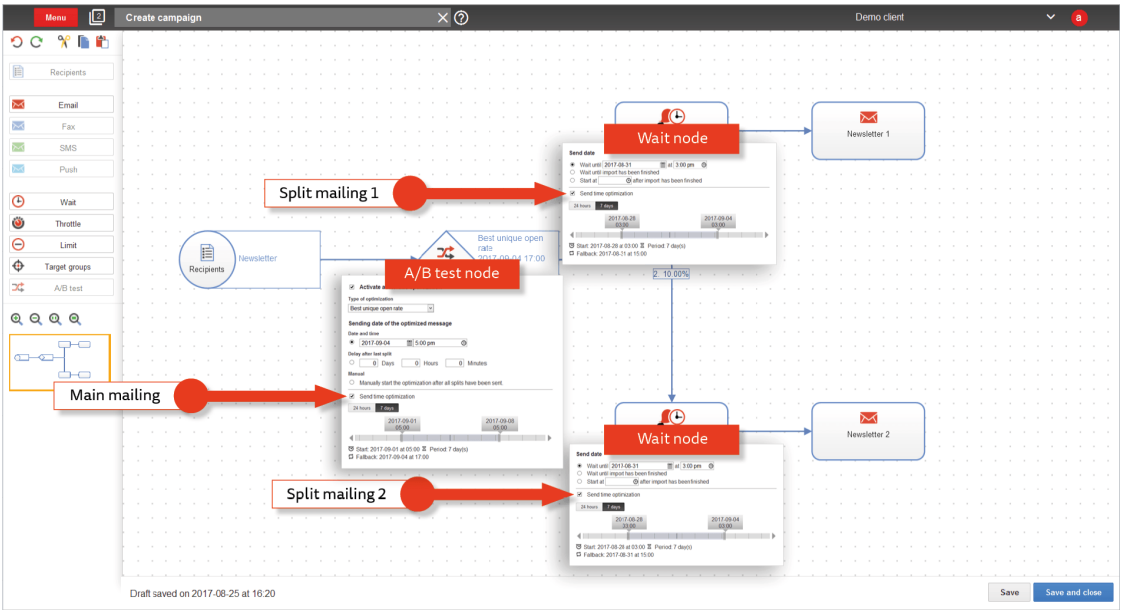
Wait node of the split mailing.



For more information about the Smart Campaigns node and the split dispatch, see the following sections:

- Smart Campaigns nodes
- Split dispatch

Analysis: Send time optimization overview

If send time optimization is set up in your client, you will have access to an additional feature under Smart Campaigns: the **Send time optimization** overview. This feature provides you with a clear visual overview that lets you analyze the spread of the send times and peak send times of mailings. In addition, this overview gives you information on the number of recipients to whom your message was sent at the fallback time because there was not enough data to determine a personalized send time.

To generate and view the send time optimization overview, perform the following steps:

1. Open the start menu and, under **Campaigns**, click **Smart Campaigns**.

✔ The **Campaigns** window opens.

2. Select the campaign for which you want to generate an analysis and for which you want to view the **Send time optimization overview**.

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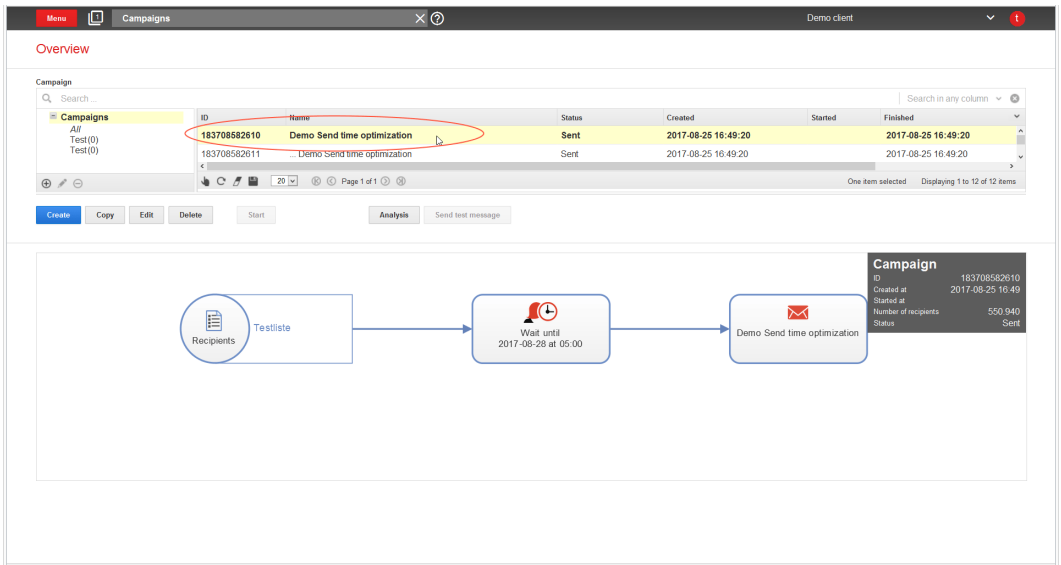
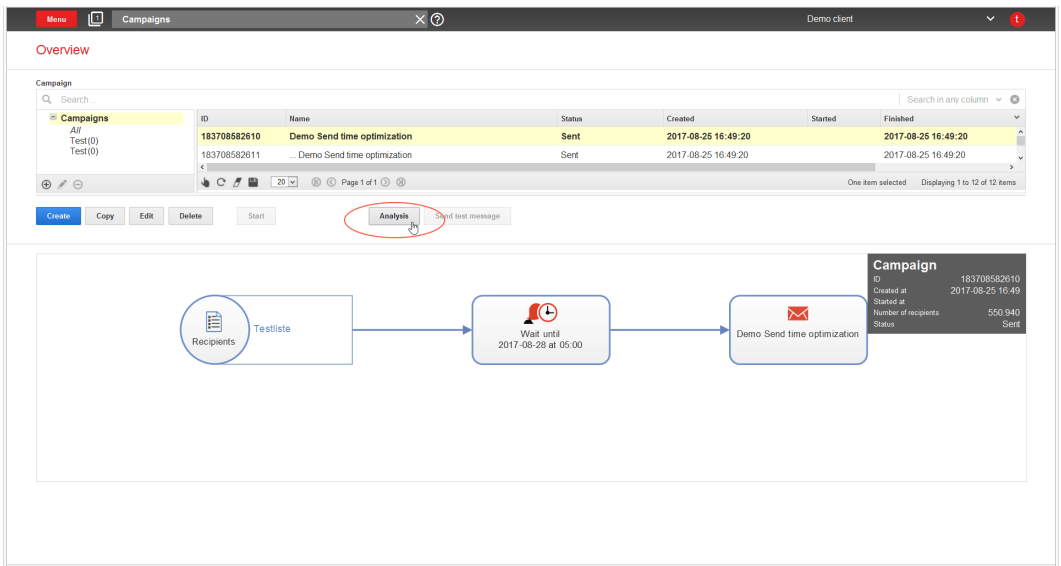


3. Click **Analysis** .



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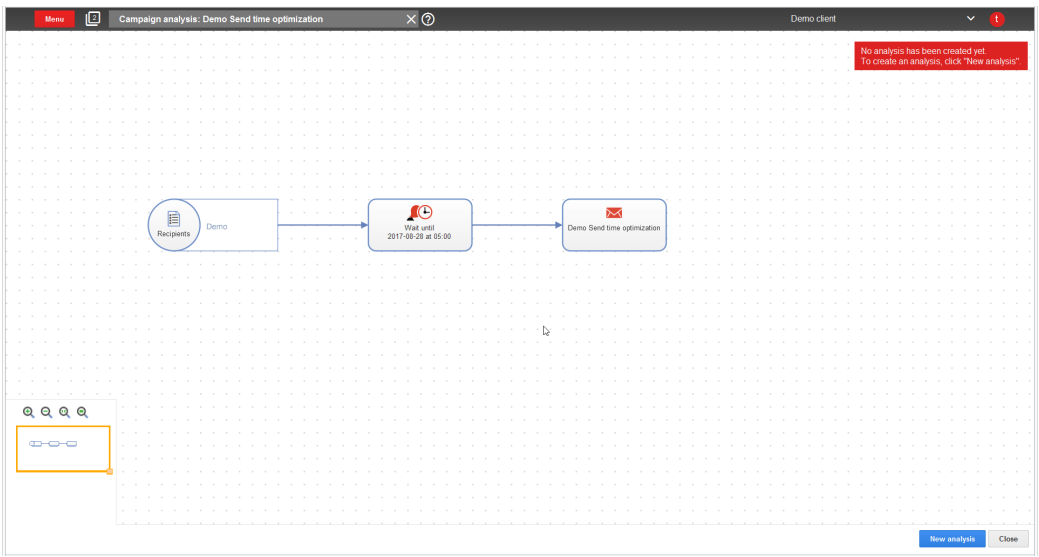
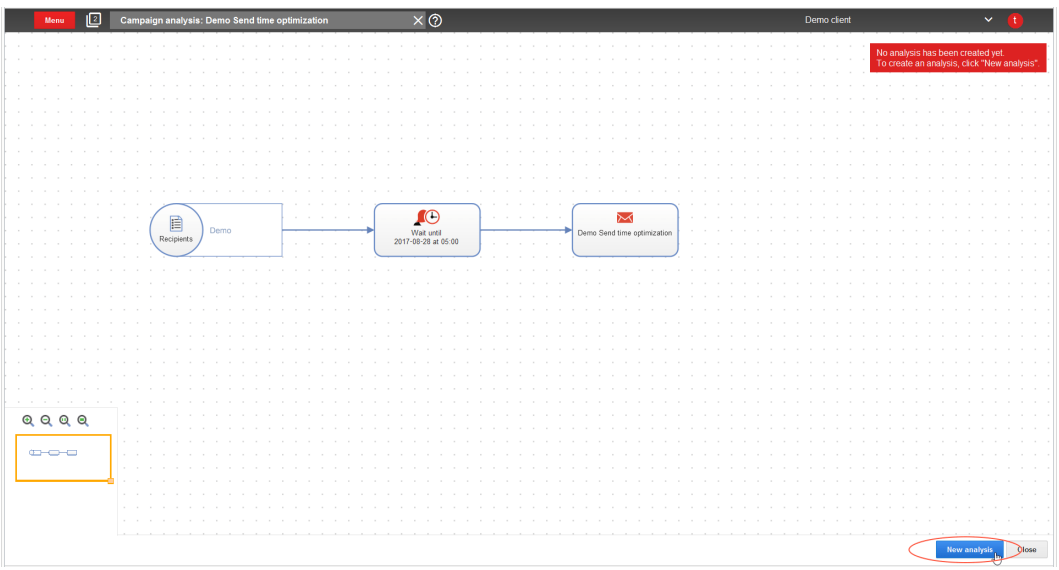
✔ The **Campaign analysis** window opens.



➔ 4. Click **New analysis**.



✔ A new campaign analysis containing the **Send time optimization overview** is created. It may take a few minutes to generate the analysis. When the new analysis is generated, you will see context menus with data about the recipients and the campaign nodes.

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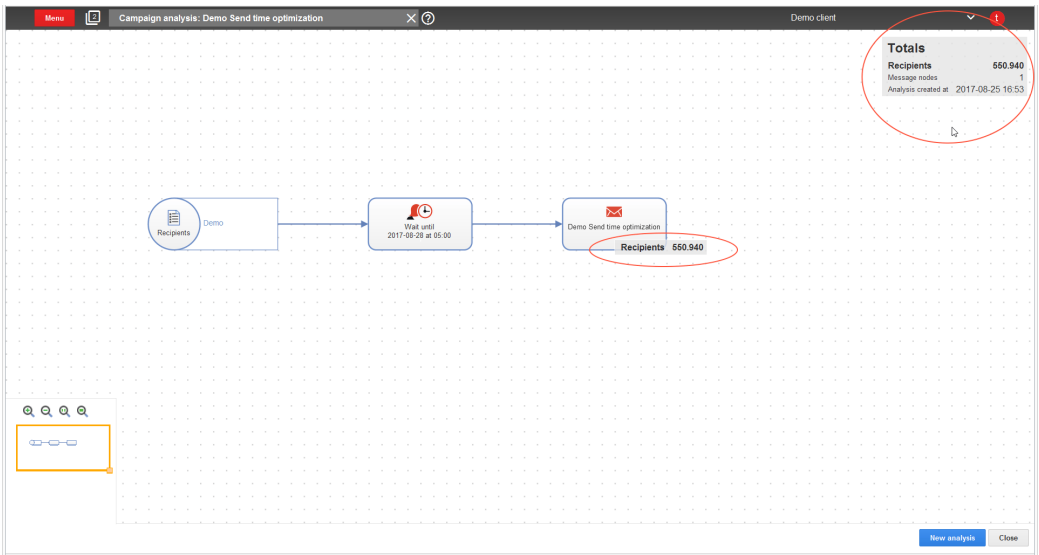
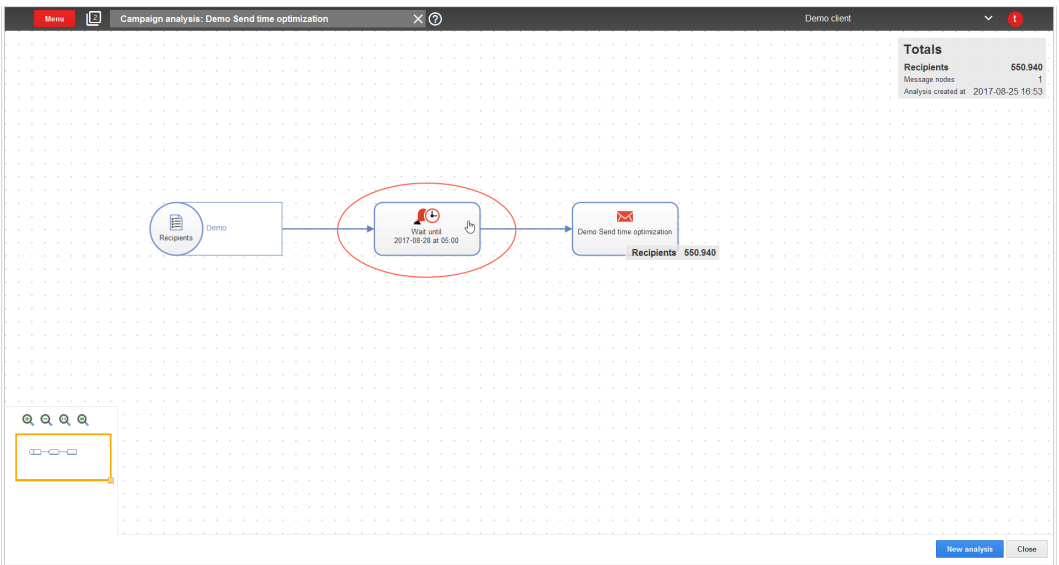


5. To view the **Send time optimization overview**, click the corresponding **Wait** node or **A/B test** node.



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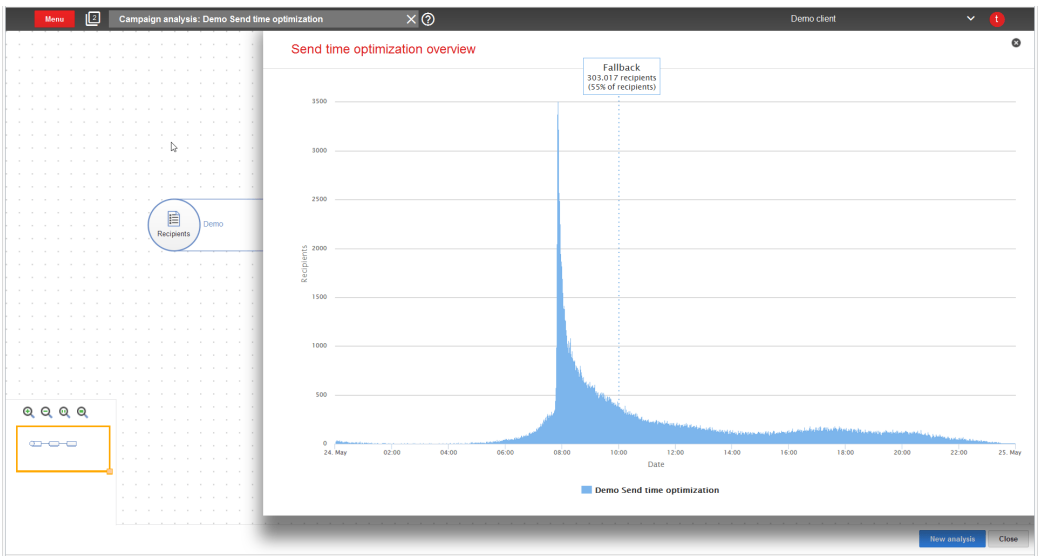
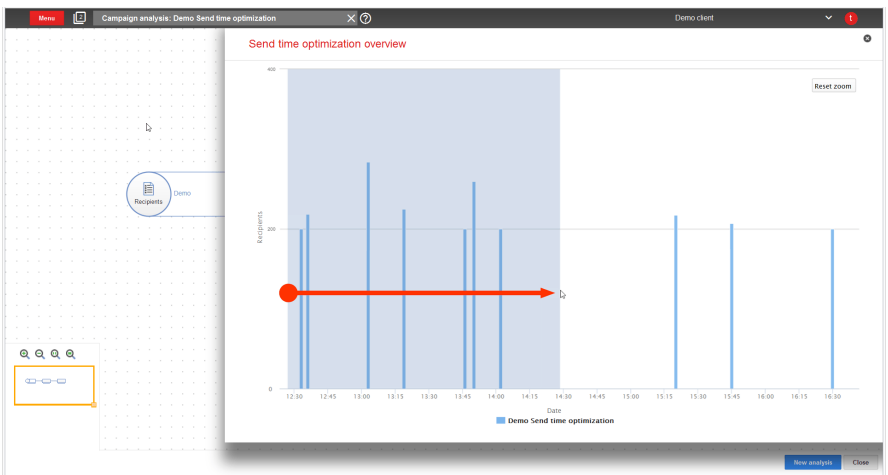
✔ The **Send time optimization overview** is displayed.



→ 6. See the **Send time optimization overview** for the distribution spread of mailings, the peak send times, and the number of recipients to whom your message was sent at the fallback time because there was not enough data to determine a personalized send time for them.

To zoom in on the graphic for detailed information about a particular time window, click and drag the mouse over the desired time window.



To return to the default view, click Reset zoom .

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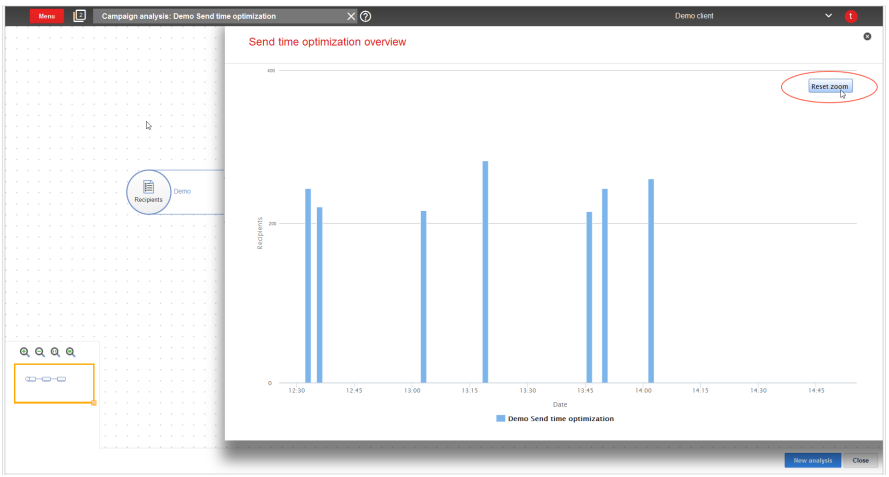
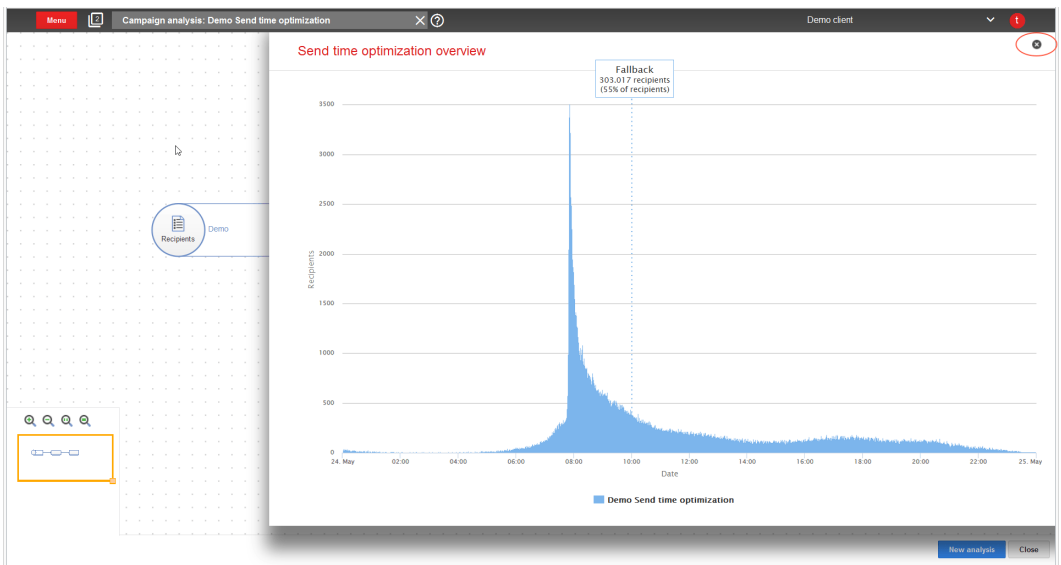


7. To close the **Send time optimization overview**, click **Close** in the upper right corner.



Validate mailing prior to dispatch

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

This add-on validates, whether pre-defined parameters of a mailing are met. The validation is carried out prior to dispatch or when the mailing is saved. This automatic test can be configured for virtually any

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parameter of a mailing. The validation can be done against a defined value or simply check whether a parameter has been set or not.

Examples

- Mailing must contain an attachment
- Maximum number of email per hour has been set for dispatch and lies within a defined range
- Target group has been selected

Send automatic notification after dispatch

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

This add-on send an automatic email notification to your personal email address after a mailing has been sent. The notification contains sending date and time, number of recipients and further mailing details.

Send S/MIME signed emails

Send S/MIME signed emails via Episerver Campaign and increase your recipients' confidence. Thanks to your digital signature, your recipients can rest assured that the messages were actually sent by you and the contents have not been subsequently manipulated. The digital signature includes all components of an email, e.g. attachments.

Digital signatures only ensure data integrity. This does not apply to confidentiality. Emails protected with a digital signature will continue to be sent in plain text. Message encryption of the S/MIME standard is not supported.

Requirements

In order to send S/MIME signed emails via Episerver Campaign, you need the following:

- the Episerver Campaign feature **S/MIME certificates**
- a S/MIME certificate issued by a certification body, which certifies the authenticity of the respective email address, for each email address used to send messages

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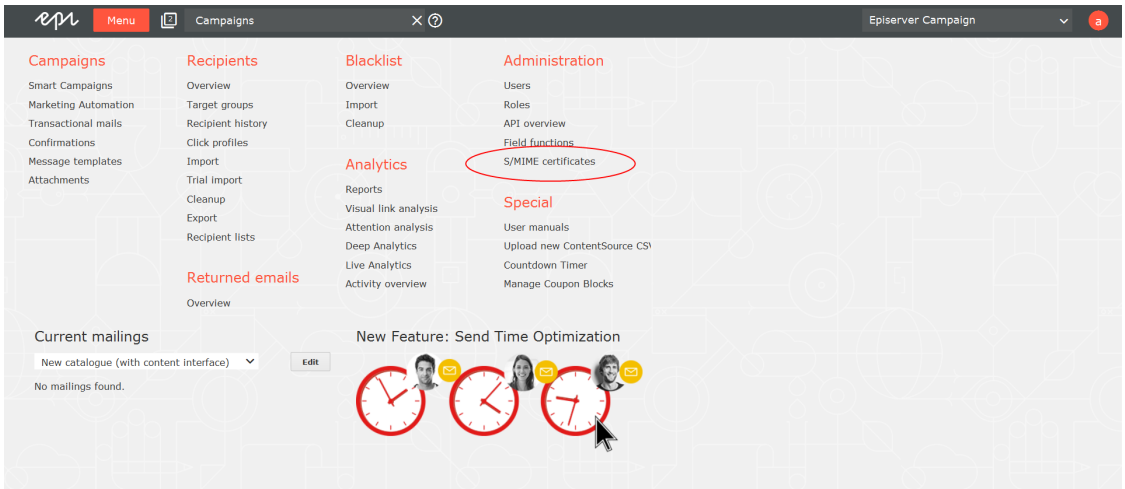
Setup

➔ To set up the **S/MIME certificates** feature, contact the Episerver customer support team, who will be happy to enable this feature for you.

✔ You will find the feature in the start menu under **Administration**.



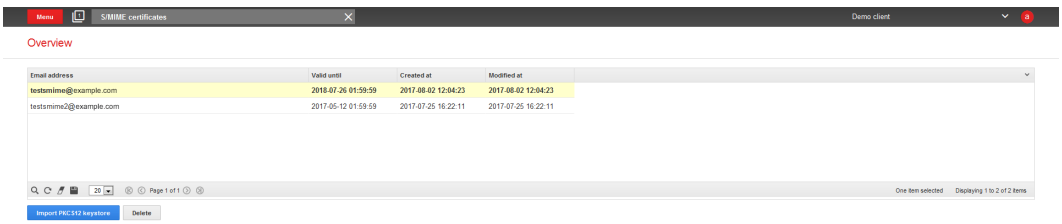
➔ To get an S/MIME certificate for your email, contact the respective certification body.

Import S/MIME certificates

To import one or several S/MIME certificates, perform the following steps:

➔ 1. In the start menu under **Administration**, click **S/MIME certificates**.

✔ The **S/MIME certificates** window opens.



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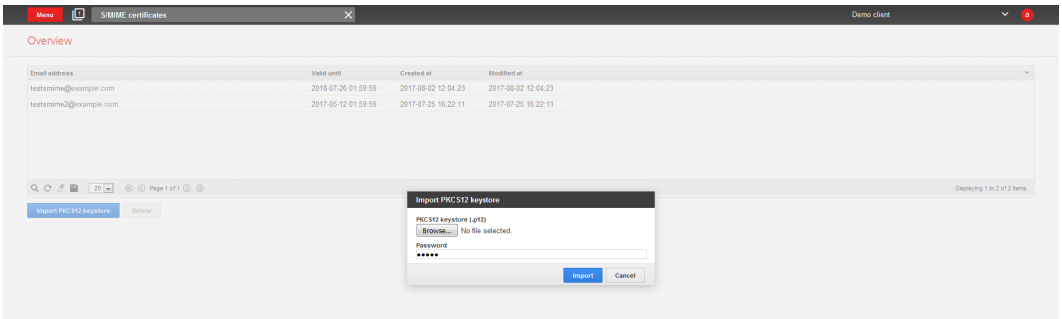
2. Click Import PKCS12 keystore.

✔ The **Import PKCS12 keystore** dialog opens.



3. Click Browse... and select the certificate file you want to upload.

> The certificate file must be available in PKCS12 format. If the certificate is not available in PKCS12 format, convert the certificate file to the required format.

4. In the **Password** box, enter the backup password for your certificate file.

5. Click Import.

✔ You have successfully uploaded the selected certificate file. You can find the certificate file in the list in the overview. Refer to this list for information regarding the associated email address, the validity date of the certificate, the creation and modification date, and when the certificate was uploaded or changed.

> If you have stored a S/MIME signature for your sender address, the notification **signed with S/MIME** is displayed in the **Edit content** window above your email address anytime you edit a message.

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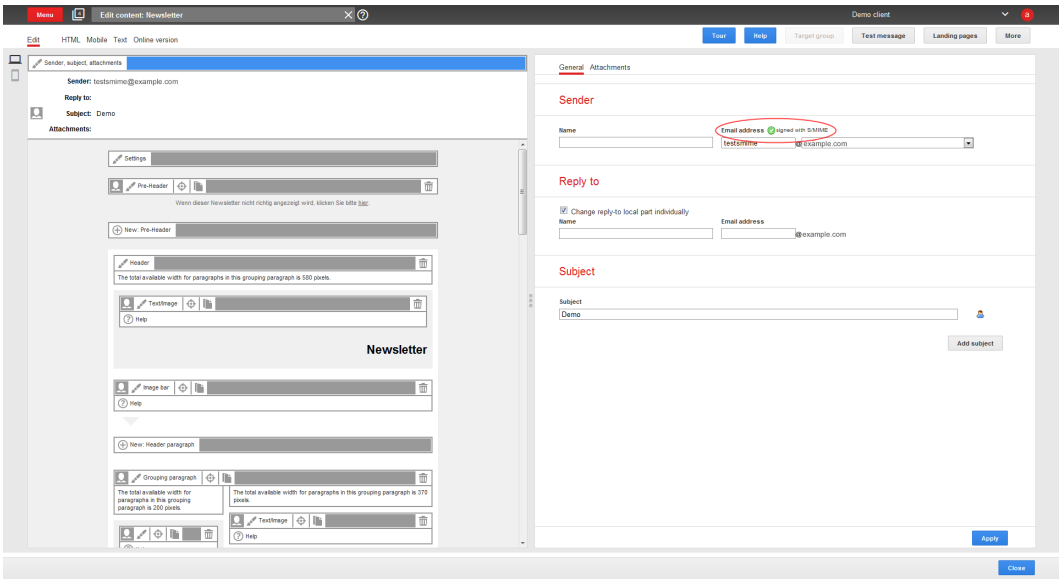

Delete S/MIME certificates

To delete a S/MIME certificate, perform the following steps:

1. In the start menu under **Administration**, click **S/MIME certificates**.

✔ The **S/MIME certificates** window opens.

2. In the list, select the S/MIME certificate you want to delete.

3. Click Delete .

✔ A confirmation dialog opens.

4. Click Delete certificate .

✔ You have successfully deleted the selected S/MIME certificate.

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Edit and manage content

This chapter gives you all the information about Episerver Campaign's content management system. Read about how you can create, edit and manage mailing contents. On top of this, you will find details here about the various options for designing interactive and personalized contents with Episerver Campaign.

- Edit mailing content: Using Episerver Campaign CMS.
- The Template Kit: Creating and editing mailings with the mailing kit.
- Field functions: Scripting and using field functions.
- Coupon system: Creating coupon blocks and embedding coupons in mailings.
- Countdown timers: Creating countdown timers and embedding them in mailings.
- Click2Go: Creating call-to-action buttons and embedding them in mailings.
- Picture Perfect: Editing images.
- Image personalization: Creating mailings with personalized images.
- Easy Copy: Copying mailing content.
- Mobile Fusion: Optimizing mailings for mobile display.
- Attachments: Uploading and editing attachments.
- Prefix or suffix subject line: Enabling text to be automatically added to subject lines.
- Upload file: Uploading files manually.
- Update mailing content prior to dispatch: Updating content before dispatch via the content interface.
- Publish mailing: Copying mailings to other clients.
- Video emails: Embedding videos in mailings.
- Newsletter design: Layout tips for newsletter design.

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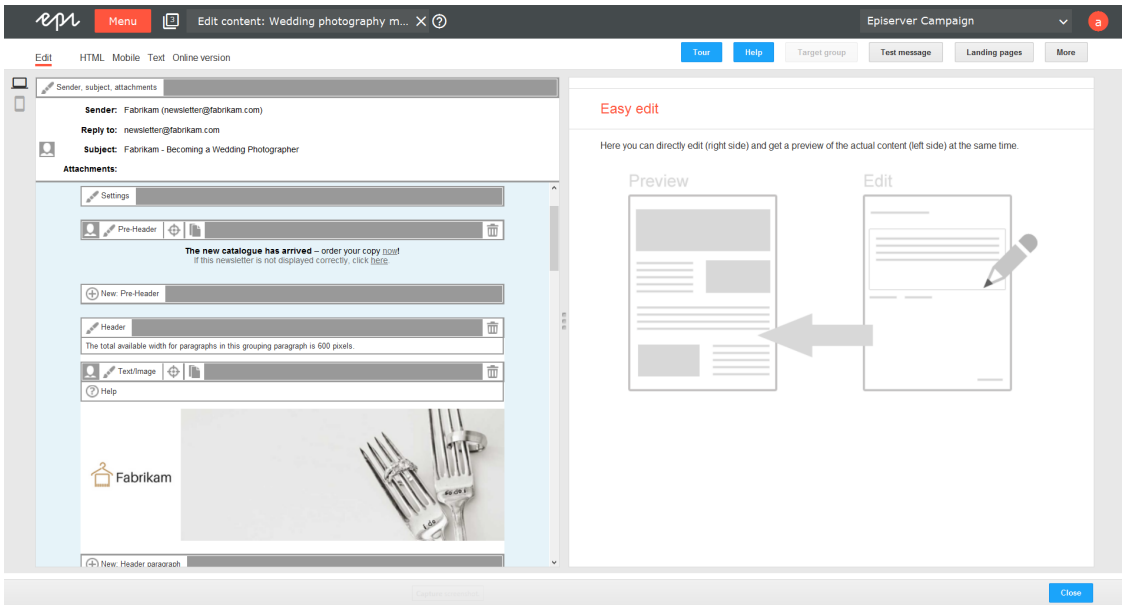
Edit mailing content



If you use the Episerver Template Kit or a custom template to edit your mailings, the integrated content management system (CMS) provides a comfortable and intuitive WYSIWYG editor (What You See Is What You Get), which displays the mailing as it will look like when sent. All editable content elements – called paragraphs – have a menu bar with buttons for editing, moving, copying and deleting them. According to the configuration of your template, some elements might be editable, but cannot be moved or deleted. In this case, the menu bar shows only an ... button. To edit the contents or change layout and other settings of the element, click it.

Editing mode Easy edit

Using the advanced editing mode **Easy edit**, changed or inserted content is shown in an ad-hoc preview area. On the right side of the editing window, change the content – as described in the following sections – and then click Apply. A preview of the changes is immediately displayed on the left side.

Change view

By default, the tab bar at the upper edge of the editor window shows the **Edit** tab. Besides this, there are tabs to change the view mode to HTML, mobile, text and online preview of the mailing you are editing. In the HTML preview, menu bars and buttons are hidden and you see the mailing as it will later be shown to the recipients.

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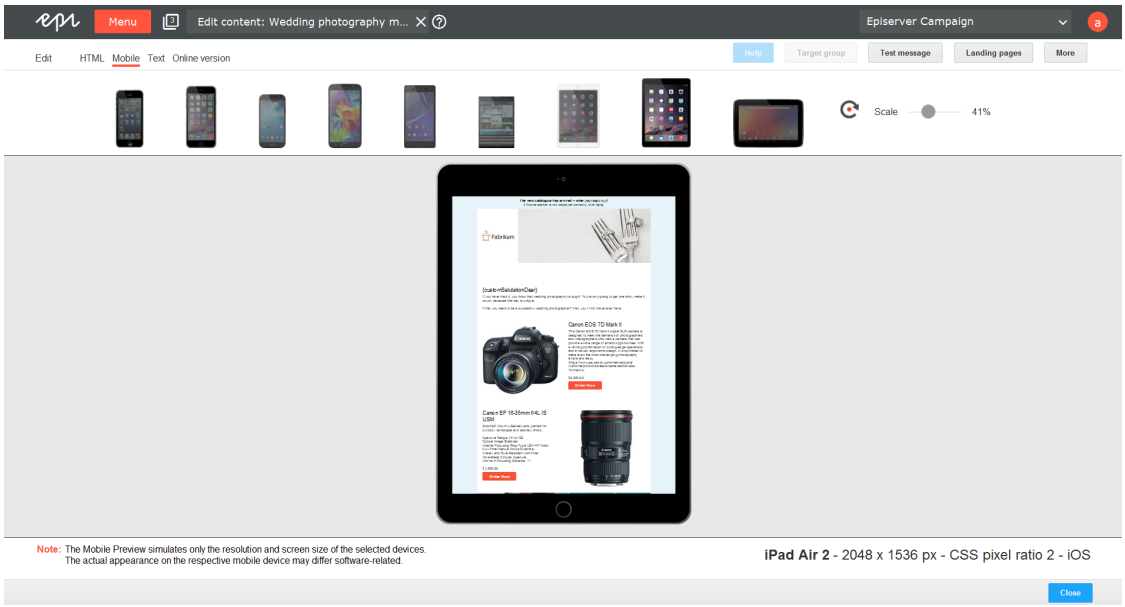
Mobile preview



The Mobile tab displays a preview of your newsletter on several mobile devices and with various display modes. The online preview shows the mailing as recipients will see it, when they click on the online version link on top. The last tab shows the text-only version of the mailing.

In this mode you can preview your mailing on mobile devices. If you use a template with integrated mobile version/Mobile Fusion (e.g. the Template Kit) the optimized layout for each device will automatically be shown. If you do not use a Mobile Fusion template yet, the HTML version is shown and scaled to fit the display of the selected mobile device.

To test different devices and display modes, perform the following steps:

1. In the list above the preview, click a mobile device.

✔ The mailing preview for this device is displayed.

2. Move the cursor over the mailing preview; the arrow changes to a hand icon. Click and move the mailing to scroll down and up in the preview.
3. Click to switch between portrait and landscape mode.
4. Move the slider on the right to change the scale of the preview.

Mobile Preview is available for the following devices:

Name	Display resolution	Display size
iPhone 5	640 x 1136 pixels	4 inch

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Name	Display resolution	Display size
iPhone 6	750 x 1334 pixels	4.7 inch
Galaxy S4 mini	540 x 960 pixels	4.3 inch
Galaxy S5	1080 x 1.920 pixels	5.1 inch
Sony Xperia Z3 Compact	720 x 1280 pixels	4.6 inch
BlackBerry Passport	1440 x 1440 pixels	4.5 inch
iPad mini 3	1536 x 2048 pixels	7.9 inch
iPad Air 2	1536 x 2048 pixels	9.7 inch
Google Nexus 10	1600 x 2560 pixels	10.1 inch

The preview of a mailing serves only to test content and layout of the mobile version. The actual appearance on the respective devices may differ due to different software versions and settings. If you wish to implement a preview for a mobile device not listed here, ask customer support.

Action buttons

In the top right corner of the window, you can find the following buttons:

- Target group : This button will not become active until at least one content element uses a target group. Click this button, select one or more target groups and click Submit selection to see only the content elements that are assigned to the selected target groups.
- Landing pages : Click here to create a landing page from the mailing. The layout of landing pages is the same as for the mailing and landing pages can be edited the same way as the mailing they are associated with.

  - To create a link to a landing page, in the **URL** box, use the placeholder `{Landing page:n°}`. In this placeholder, the **n°** element must be substituted by the respective number of the landing page (for example, `{Landing page:1}`).

  - To find out the number of a landing page, click Landing pages to open a list of all landing pages and their respective numbers.

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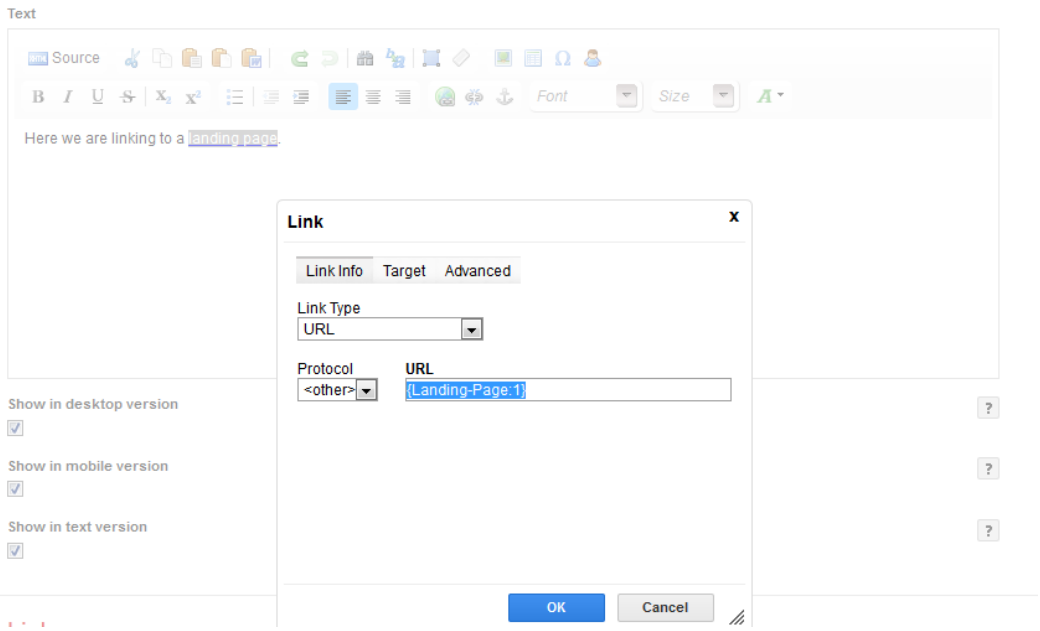

» More : This button contains the menu items **Content Report**, **Print**, **HTML (PNG)**, **Retrieve RSS feeds** and **Edit directly**.

Be aware, that the WYSIWYG editor can no longer be used, after the **Edit directly** option has been enabled.

Closing the editor window automatically saves all changes.

Paragraphs

Content elements in a template are called paragraphs. They can contain various content (text, images, banners, lists etc.). In a template, content is always included as a paragraph.

You can execute the following actions:

- Add
- Import
- Edit
- Move
- Copy
- Delete

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Add

→ Wherever you can insert a new paragraph, you will see a button New: ... instead of the three dots the name of the paragraph that can be inserted is shown. Click on it to insert a new paragraph. Depending on the complexity of your template, you must select a sub-type of the inserted paragraph in the next step. At last, click Save to add the new element to your mailing.

Import

To import paragraphs from other messages, perform the following steps:

→ 1. Click New: ... .

→ 2. Click Import paragraph and select the source.

→ 3. In the **Source client** drop-down list , select a client. If you only use one client, it is already selected.

→ 4. In the **Source content** drop-down list, select a message or message template and click Next .

✔ All importable paragraphs from the source are shown.

→ 5. Select the check boxes of all paragraphs you want to import.

→ 6. Click Import paragraphs to start the import.

Edit

→ To edit a paragraph click ... .

✔ The editor interface opens in a new layer. According to the paragraph type you are editing, it contains several tabs and input fields for entering content, setting the layout and assigning target groups or click profiles. If you use the share function for social networks (SWYN), you will find as well a tab named **SWYN**. To learn more about sharing content via social networks, see the The Template Kit section.

Move

New paragraphs can only be added at the end of a content section (header, footer, paragraph group etc.) you can move it up and down to place it at the desired position.

→ To move an element, click ... and move the cursor to the position where you want to insert it. When the message **Click here to move the selected paragraph above this paragraph** is displayed, click again to drop it there.

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Again, be aware that some paragraphs cannot be moved everywhere or can only be moved within a certain section.

Copy

- To copy a paragraph, click ... . Then, move the cursor to the position where you want to insert the copied paragraph. When the message **Click here to copy the selected paragraph above this paragraph** is displayed, click again to drop and insert the copied paragraph.

Delete

- To delete a paragraph, click ... .

Some paragraphs are mandatory and thus cannot be deleted.

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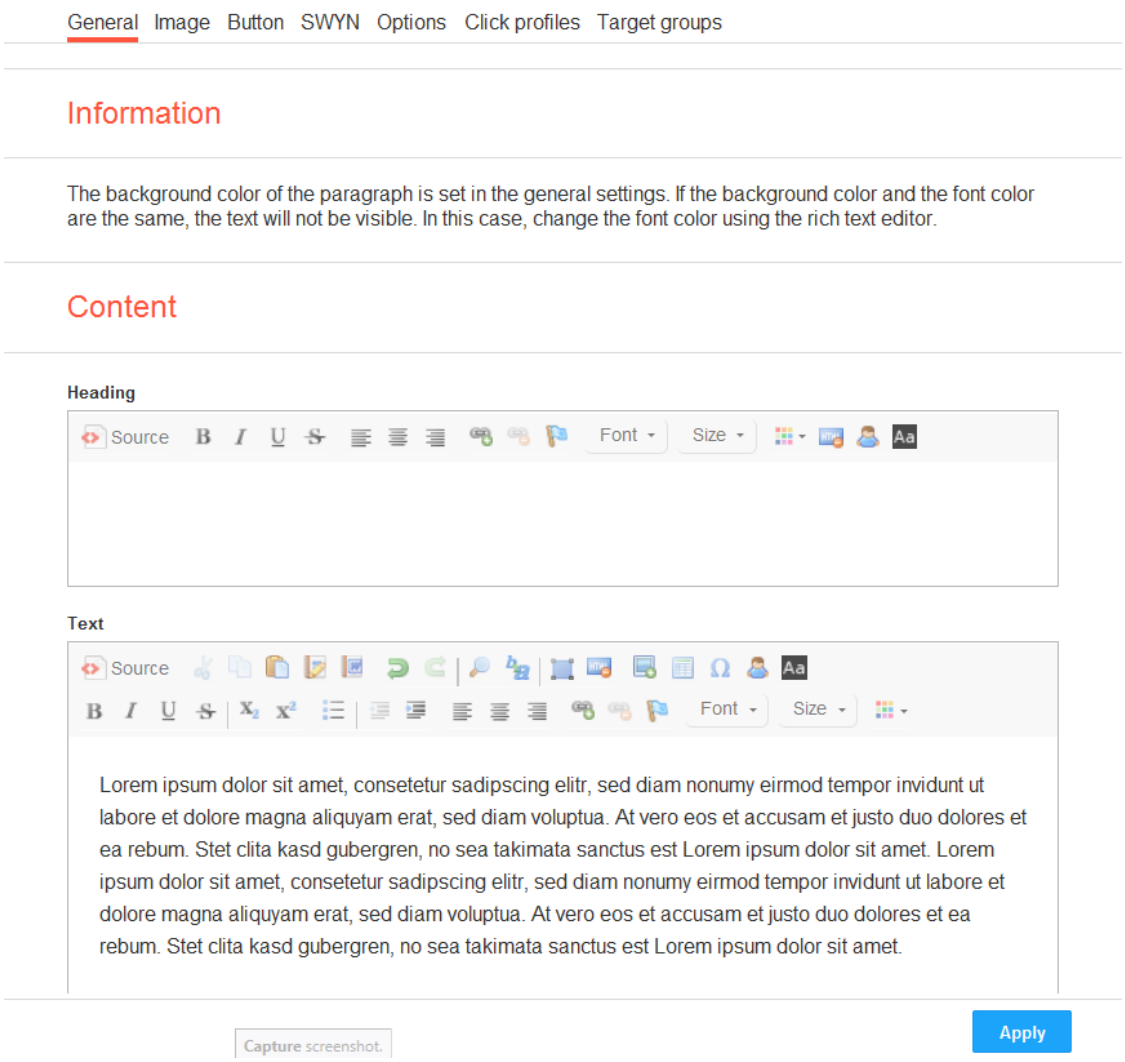
Working with the rich text editor



For any text input (except headlines, subtitles or links) templates provide a rich text editor which opens when you click in a text field. In the tool bar of the editor you will find buttons for simple text formatting similar to those in a text processing software (e.g. Microsoft Word).

Change background color in the rich text editor

When working in the rich text editor with a white font or very light font, you can change the background color of the editor to make editing easier.

→ Click **Change background color** Aa in the toolbar of the relevant text field. Click the button again to change the background back to white.

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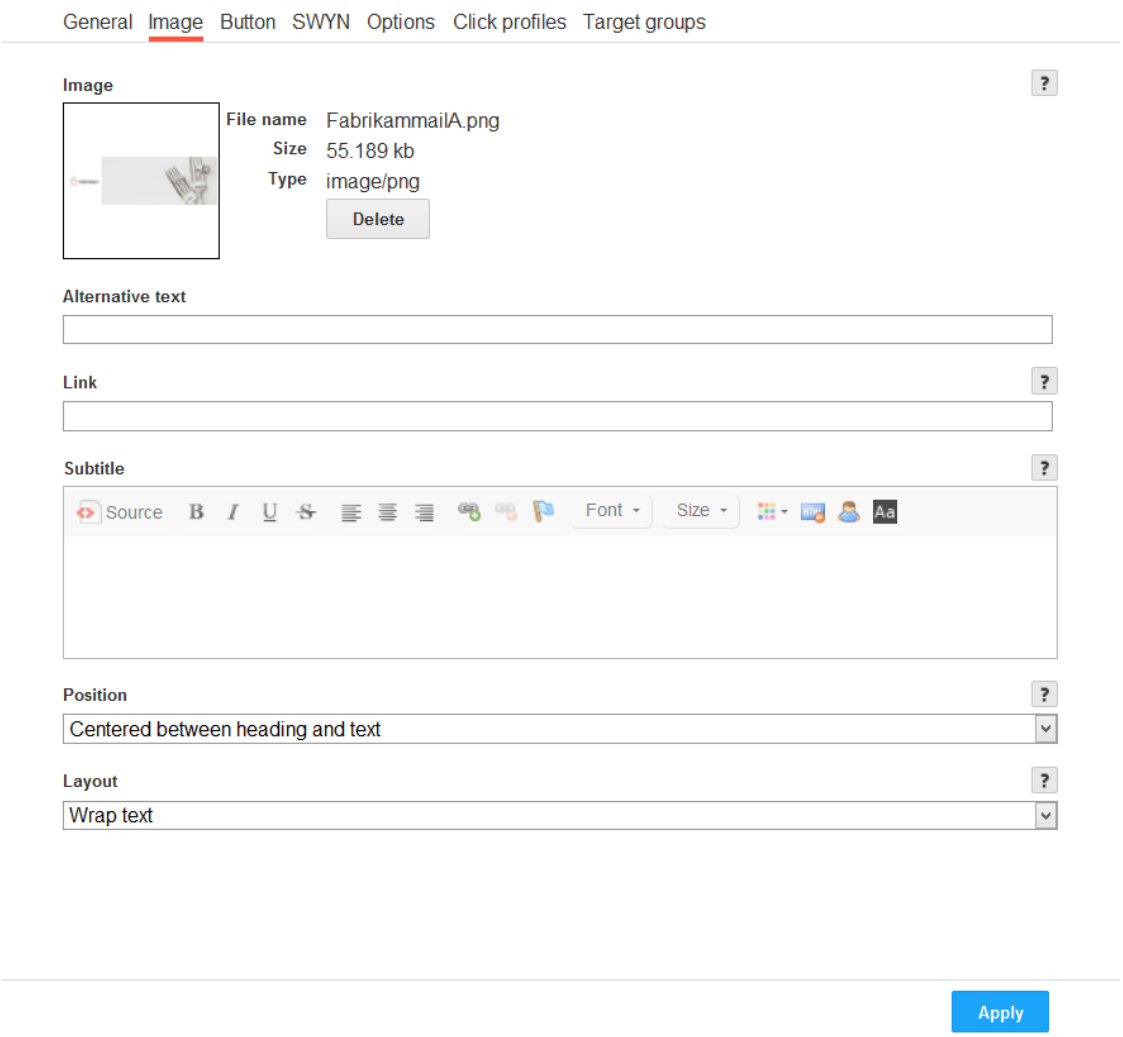
Field functions

In the editor toolbar, click **Insert field function** to insert a field function. A field function can simply insert the content of a recipient list field, a personalization algorithm or other personalized content.

Personalized links

Field functions can also be used to create personalized links in your mailings. Field function place holders can be used in the domain part or path of a URL as well as in URL parameters. The link tracking of personalized links works as in regular links.

Images



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Some paragraph types allow you to insert an image, either in the **General** tab or in the **Image** tab. Whenever an image can be inserted, you will find a Browse... button and an alternative URL field. Images can either be uploaded from your computer or referenced via a URL. If you choose the latter option, make sure that the image is available at the indicated server when the mailing is being sent. Otherwise the sending cannot be done. Image files can be formatted as .jpg, .jpeg, .png or .gif.

All images used in a mailing are automatically scaled to the size defined in the template. For the best image quality, however, we recommend that you resize images to fit before uploading them.

➜ To delete an image, simply click Delete and then Save.

Edit directly

Instead of editing a template, you can edit the HTML source code of a mailing directly. In the top toolbar of the editor window, click More and select the **Edit directly** option. You can now edit the HTML source code or the text version of your mailing. Just select the tab to edit the desired version. Before you save your changes, select the **Activated** check box.

If you activate the **Edit directly** mode, the original template cannot be edited afterwards. If you switch back from the **Edit directly** mode to the template editor, all changes made in this mode are lost.

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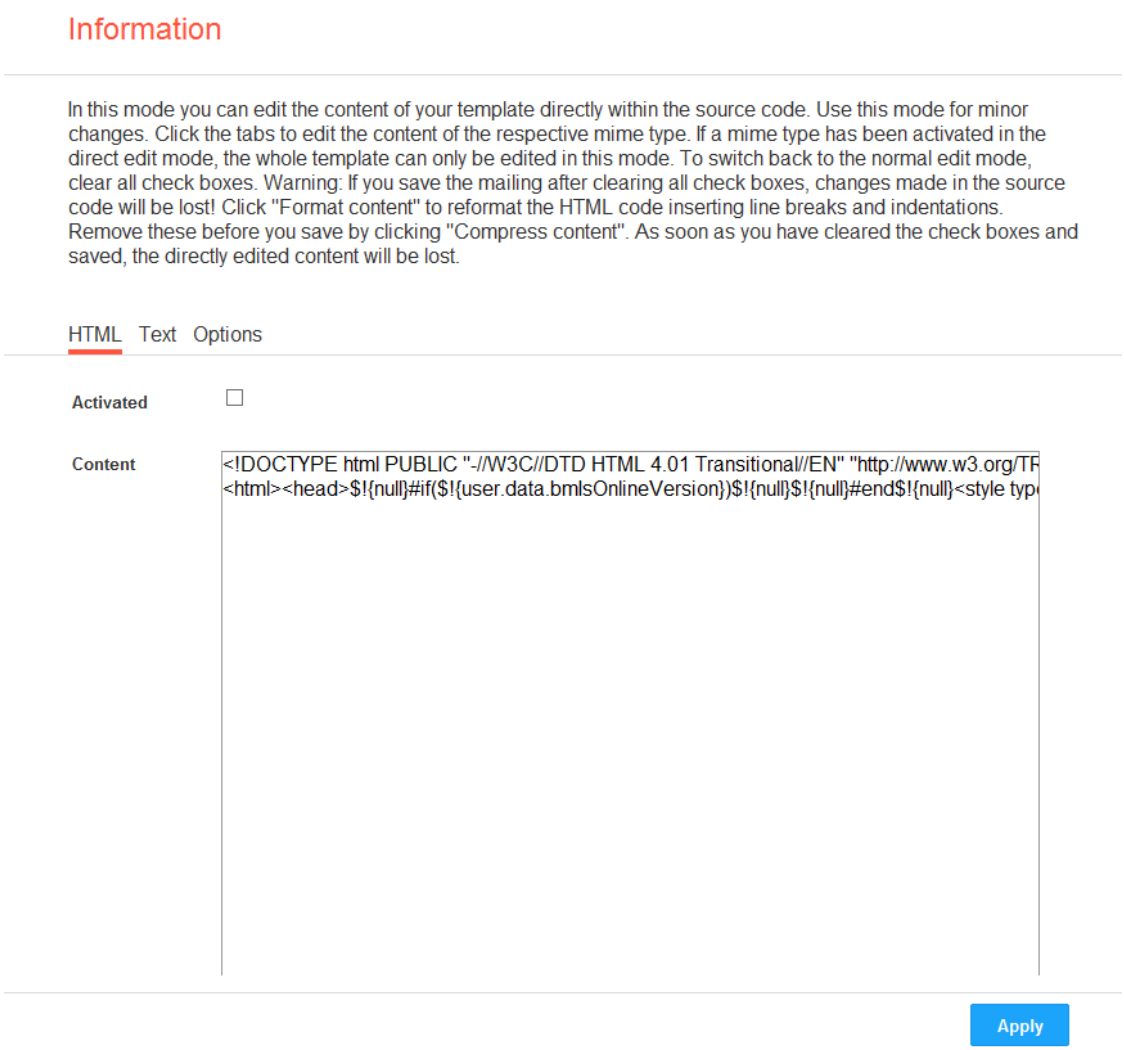
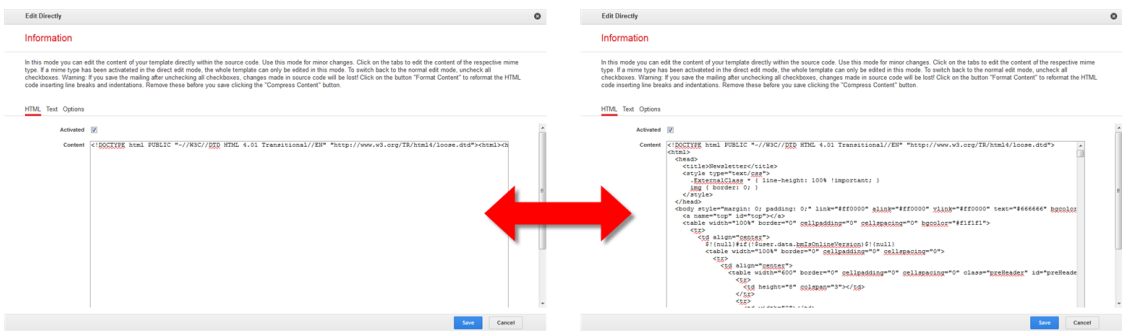


Editing tools

➜ When editing the HTML code, click Format content.

✔ The code will then be reformatted inserting line breaks and indenting the tags.



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➜ Before saving, click Compress content to remove the line breaks and indented tags. This is necessary in order that velocity elements within the HTML code (e.g. field functions) work correctly.

The Template Kit

The generic Template Kit gives you the greatest flexibility and usability to create newsletters. You can use it out-of-the box and with your corporate design style guide. Optionally, you can add Mobile Fusion to the Template Kit to send mailings with an optimized version for mobile devices.

Simply transfer your design specifications directly into the Template Kit

If your company works with design specifications, you can use the Template Kit to turn these directly into mailings without any special knowledge of graphic design or composition. Internal studies have shown that the majority of design specifications can be easily mapped out using the Template Kit. The layout of structural and content elements follows a logical pattern that is found in most newsletters. We have also used standard terminology in naming the individual elements, so that, whether you are a graphic designer, editor or project manager, you will be able to find your way around quickly and easily.

Basic settings are inherited all the way to the content

Once basic preferences have been set (such as text and background colors, spacing etc.), they are applied to all content matter. This provides you with a consistent layout without the need to set additional preferences for the content elements. If you should need a different layout, whether at structural or content level, you will be able to design each individual element according to your specific needs. The principle of hierarchical acquisition guarantees a layout-compliant/CI-compliant newsletter without the need to define each and every parameter individually.

The separation of structure and content provides highest flexibility

When developing the Template Kit, we implemented the systematic separation of structural and content elements. Once you have familiarized yourself with this concept, you will find that this provides you with the highest level of flexibility and latitude in designing your newsletters.

Configuration paragraphs – Organizing your newsletter

Configuration paragraphs greatly expand your design options. Each configuration paragraph functions like a section of the newsletter, which you supply with its own layout and content. Header and footer segments have also been set up as configuration paragraphs.

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Flexible tables of contents

The table of contents generally serves as the recipient's point-of-entry to your newsletter's content and is therefore decisive with respect to the conversion rate. The Template Kit gives you full control over what appears in the table of contents. In addition, each configuration paragraph can be provided with its own table of contents.

Single or two column grids

Our customers often require multiple column layouts. We have taken this need into consideration in the design of our Template Kit. You are able to set column width, position and spacing according to your needs. But the best thing about this is that you are able to set the configuration paragraphs individually, regardless single or two column layouts.

Design tips for single- and double-columned layouts:

If you need to use both of these layouts in a mailing, be sure to use them efficiently and rationally, for example:

- A two column editorial with a table of contents in a sidebar: The most important content, such as new products, should be visible immediately without having to scroll down the screen, and should be placed in a prominent position next to the editorial, where reference can be made to them.
- A single column product area: A sidebar is not needed in the product area. In this case you can use a single column layout, to take maximum advantage of the full width of the newsletter.

Fully equipped and seamlessly integrated

The Template Kit offers you a wide range of versatile accessories: Every element can be assigned to a target group, so that relevant content is shown only to those mailing recipients who are part of a selected target group. Even pre-headers and newsletter headers and footers can be designed for specific target groups. This lets you exploit the full potential of customized email marketing in a single mailing.

Click profiles

The ability to assign click profiles was integrated into all elements so that you can obtain valid data about recipient click behavior without needing to expend a lot of time and energy on configuration.

Sharing content via social networks (SWYN)

You are in complete control over what content will be shared as well as the layout of share buttons and redirection.

Easily create landing pages

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Landing pages can be created with a single click of the mouse. You can edit landing pages in the template editor and link them to the desired location. Using the SWYN feature, landing pages are created and linked automatically.

Using pre-headers for an even more personalized approach

Here you can include a greeting, a special offer or a keyword specifically tailored to a particular target group. Since the pre-header precedes the newsletter, this element is certain to get a great deal of attention.

Little things count: integrate your favicon

Favicons are small icons, logos or symbols with 16×16 or 32×32 pixels. Typically browsers display these – in the address bar, on tabs, next to bookmarks or in your history. You can integrate a favicon into the online version of your message with Episerver Campaign, for example your company logo. For a professional overall appearance of your email marketing: show your customers that the little things matter to you too.

Technical instructions for your layout in the Template Kit

This leaflet describes important technical requirements for the implementation of your newsletter design using the Template Kit. Send this leaflet to your employee or the agency that will design your newsletter. This will ensure that your layout meets the requirements for the Template Kit – regardless of whether you create your content template yourself or have ordered this service from us.

Lacking inspiration? We are happy to create your newsletter for you.

We will gladly take care of the design of your content template should you wish to make use of our design expertise. Talk to us! On request, we also implement your content template into Episerver Campaign. Your key account manager will be happy to provide you with an offer for this service.

Newsletter width

The ideal width of the newsletter depends on the device that the newsletter recipient views it on (responsive design):

- **Desktop version**: between 600 and 650 pixels
- **Mobile version**: 480 pixels (for more information, read the Mobile Fusion section).

Fonts

The following standard fonts can be used in the Template Kit:

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- Arial
- Comic Sans
- Courier New
- Georgia
- Lucinda Sans Unicode
- Tahoma
- Times New Roman
- Trebuchet MS
- Verdana

Alternatively, it is possible to store texts with other fonts as an image in the Template Kit. All texts that have been used in this way can no longer be edited with the Template Kit. Note, that all images in the mailing are only visible after loading.

Design options

It is not possible to display color and background gradients as well as shadowing. However, it is possible to round off edges. If you would like to create the content template in Episerver Campaign yourself, then you can do this in the relevant grouping paragraphs using the “Border” option.

Mobile Fusion

The Template Kit provides a preview for the mobile appearance of your mailings on selected smartphones and tablets. In this preview you can check the vertical and horizontal mobile appearance of your newsletter. All content elements in the mobile version are automatically displayed below one another, so that the reader on mobile devices does not have to scroll to the side, but can scroll up and down. You will find an example of this on the next page. In Episerver Campaign, you can specify whether the images or the text will be shown first for the relevant content areas.

In addition, you have the option to flexibly show or hide all content areas for the desktop or mobile version.

Depending on the technical development of the Template Kit, changes to these requirements are possible. You are welcome to request an updated version of this leaflet.

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Example layouts

Now that sinking temps are on their way, it's time to transition to fall fashion. Here, we've hand-picked our favourite options to keep you looking stylish - and warm - as we say "goodbye" to summer and "hello" to fall.

Chevron Stripe Essential Tank Maxi Dress

$12.50

Revolution Women's Tank Maxi Dress:
100% polyester
Tank style maxi dress
Ankle length dress
Racer back
Adorable color scheme
Machine wash cold

Order Now

Share this:

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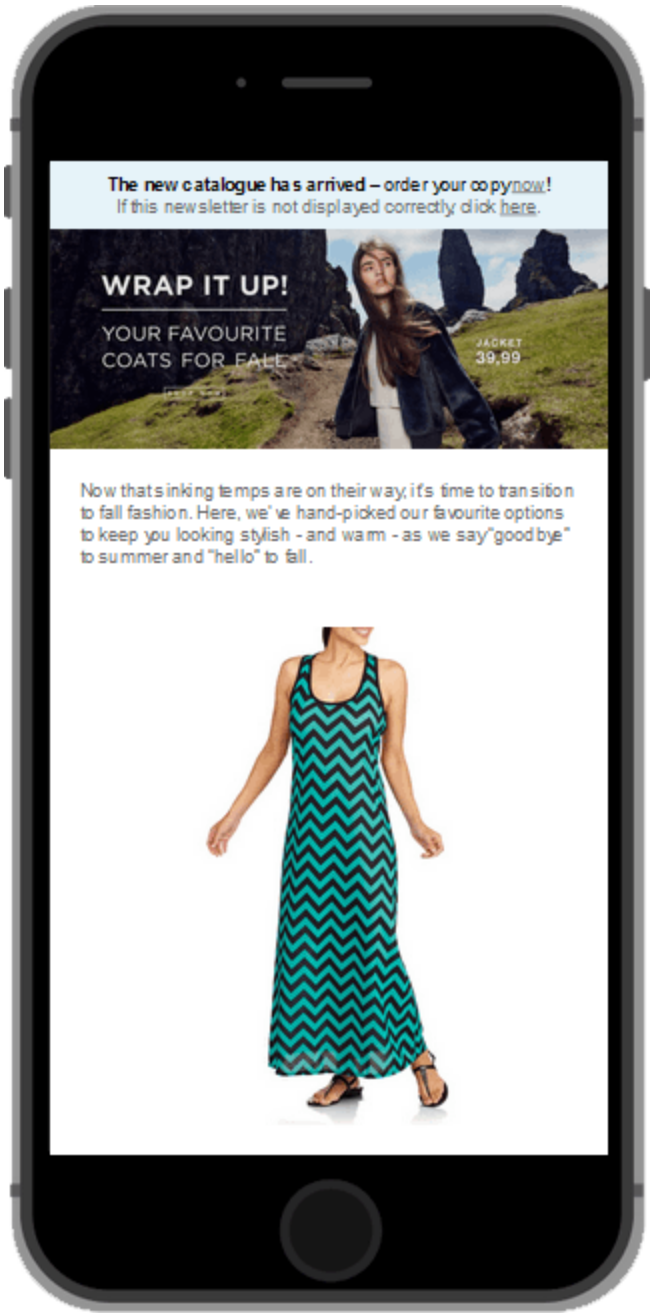

General settings

➜ Click Settings on the top border of the template editor to define fonts, basic grid, color schemes and other settings that affect the whole template.

✔ The assistant for all these settings opens in a new layer.

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- General tab
- Font settings tab
- Color settings tab
- Separator tab
- Button template tab
- SWYN tab
- Products tab
- Content interface tab
- RSS feeds tab
- Tracking tab
- Text version tab
- Mobile tab

General tab

These settings affect the general layout of the newsletter and all content, unless you overwrite them in the respective settings of a paragraph. Use the general settings for example to adapt your company's corporate design for this template.

Parameter	Description
Newsletter title...	
Text	This title will appear in the online version in the browser window title.
Layout...	
Width of the content area	The minimum width is 100 pixels. We recommend a maximum width of 650 pixels to make sure that the newsletter is displayed properly by most email clients. If you set a greater value, make sure to test your newsletter with our pre-check for deliverability and appearance[1].
Alignment	This parameter sets the alignment for the whole newsletter. The alignment of the content elements can be defined in the content paragraphs.
Margin	The maximum value is 1/8 of the total width of the newsletter. Greater values are reduced to this value. Be aware that a great distance affects the layout negatively.
Padding	This parameter defines the space between borders and content (text or images). Visually, it only becomes effective if different background colors or background images for the newsletter and the content elements have been defined. The maximum value is 1/8 of the total width of the newsletter. Greater values are reduced to this value.
Space	If no other value is set, the **Padding** value is used. Values must be set in pixels.

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Parameter	Description
between grouping paragraphs	
Space between texts and images	The maximum value is 20 pixels. Greater values are reduced to that value.
Favicon...	
URL	Enter the URL of an externally stored favicon that you like to integrate into the online version of your message. If you do not like to integrate a favicon into the online version of your message, leave the field empty.
Inherit...	
Header	The inherit value affects all landing pages, including the automatically generated. If you want to enter content different from the newsletter header in the respective areas of your landing pages, clear this check box.
Footer	The inherit value affects all landing pages, including the automatically generated. If you want to enter content different from the newsletter footer in the respective areas of your landing pages, clear this check box.

Font settings tab

Define font types, size and line height for headings, text and links.

Parameter	Description
Headings...	
Font type	You can define several font types in a comma-separated list. When the mailing is being displayed, the browser or email client will try to use the first font in this list. Should this font not be installed on the system, the next is tried. At last, you should always define a generic font.
Color	The heading font color must be entered as a hexadecimal value, preceded by the # character. Click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.

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Parameter	Description
Size	Define the size of the heading text. This must be an integer value.
Line height	The default value is set by the web browser or email client of the recipient. You can, however, set a fixed, integer value. This value must be greater than the font size.
Underline	Select this check box, if you want headings to be underlined.
Bold	Select this check box, if you want headings to be bold.
Text...	
Font type	You can define several font types in a comma-separated list. When the mailing is being displayed, the browser or email client will try to use the first font in this list. Should this font not be installed on the system, the next is tried. At last, you should always define a generic font.
Color	The font color must be entered as a hexadecimal value, preceded by the # character. Click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Size	Define the size of the text. This must be an integer value.
Line height	The default value is set by the web browser or email client of the recipient. You can, however, set a fixed, integer value. This value must be greater than the font size.
Links...	
Font type	You can define several font types in a comma-separated list. When the mailing is being displayed, the browser or email client will try to use the first font in this list. Should this font not be installed on the system, the next is tried. At last, you should always define a generic font.
Color	The font color must be entered as a hexadecimal value, preceded by the # character. click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Size	Define the size of the link text. This must be an integer value.
Line height	The default value is set by the web browser or email client of the recipient. You can, however, set a fixed, integer value. This value must be greater than the font size.
Underline	Text links can be underlined. Select the desired option from the drop-down menu.

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Parameter	Description
Bold	Text links can be formatted as bold text. Select the desired option from the drop-down menu.
Table of contents with links to paragraphs...	
Font type	You can define several font types in a comma-separated list. When the mailing is being displayed, the browser or email client will try to use the first font in this list. Should this font not be installed on the system, the next is tried. At last, you should always define a generic font.
Color	The font color must be entered as a hexadecimal value, preceded by the # character. click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Size	Define the size of the TOC text. This must be an integer value.
Line height	The default value is set by the web browser or email client of the recipient. You can, however, set a fixed, integer value. This value must be greater than the font size.
Underline	Select this check box, if you want TOC links to be underlined.
Bold	Select this check box, if you want TOC links to be bold.

Color settings tab

Define general background colors or images and border colors in this tab. You can overwrite these settings in each content block.

Parameter	Description
Newsletter background...	
Color	The newsletter background is visible to the left and to the right of the newsletter. The background color must be entered as a hexadecimal value, preceded by the # character. click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Image	The correct display of background images is not supported by all email clients. The background image should not contain any important information. If you use a background image, the parameters **Alignment** and **Repeat** become effective. Be aware that the background image is only visible at the border areas and at free spaces, being masked by the content and eventual other backgrounds.

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Parameter	Description
Alignment	This parameter is only effective, if a background image has been uploaded.
Repeat	This parameter is only effective, if a background image has been uploaded.

Separator tab

Use the separator paragraph to structure your newsletter and group paragraphs. Separators may contain a top link for a simple navigation, a separator line, the top link, an image and free space. Each of these elements can be activated individually in each separator paragraph.

Parameter	Description
Separator line...	
Width	The maximum width equals the total newsletter width less padding. If a top link icon with text is set on the separation line, the width of the line is reduced by the width of this element.
Alignment	The alignment parameter is only effective, if the width is smaller than the total available width.
Border width	Must be an integer value.
Color	The separator line color must be entered as a hexadecimal value, preceded by the # character. click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Mobile...	
Width of the separator	Set the width (in percent) of the separator line for the mobile version.
Top link...	
Icon	You can replace the default icon by a custom icon. Upload the icon you want to use. The maximum width equals the maximum width of the newsletter less padding. Be aware that, if you use wide graphics, the separator line, if used, will be proportionally smaller. Graphics larger than the maximum width will be scaled down automatically.
Text	The text will always be shown. If the recipient's email client does not display the icon,

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Parameter	Description
	he will only see the text.
Text position	Select the position of the link text relative to the icon.
Position	Select the vertical position of the top link (text AND icon) relative to the separator line here. By default, the top link is placed on the separator line.
Alignment	Select the horizontal position of the top link (text AND icon) here.
Image...	
Image	Upload an image from your computer or enter an image URL in the field **Alternatively external URL** that points to the image file.
Alternative text	This text will be displayed, if a recipient has blocked or disabled the display of images in his/her email client, or if the image cannot be displayed for any other reason. We strongly recommend that you always enter an alternative text that may contain a short image description or title.
Link	You can link the image to a landing page or a page from your website. If you have entered a text link in this paragraph, we recommend that you use the same link for the image.
Position	The positioning of the image can be specified relative to the separator line and the top link. This positioning therefore affects only the appearance if at least one or both of these elements are selected in a separator.
Alignment	Select the horizontal position of the image here.
Spacing...	
Above separator	This space can optionally be added later in each separator paragraph to improve the clarity of the newsletter .
Between top link and separator line and/or icon	This space can optionally be added later in each separator paragraph to improve the clarity of the newsletter .
Below separator	This space can optionally be added later in each separator paragraph to improve the clarity of the newsletter .

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Button template tab

More information on this topic can be found in the documentation for the Click2Go function.

SWYN tab

If you use the share function for social networks (SWYN), define here the general appearance of the SWYN element in your newsletter.

Parameter	Description
Introduction...	
Text	Enter an introduction text here that will be shown together with the network icons. This text may contain a call-to-action for your recipients to share contents in their networks. Each paragraph that has the SWYN function activated, will display this text plus the network icons.
Icons...	
Facebook	Upload a custom Facebook icon or enter a URL pointing to your custom Facebook icon. If SWYN is enabled for Facebook in a paragraph, this graphic will be shown. The maximum width is 30 pixels.
Twitter	Upload a custom Twitter icon or enter a URL pointing to your custom Facebook icon. If SWYN is enabled for Twitter in a paragraph, this graphic will be shown. The maximum width is 30 pixels.
MySpace	Upload a custom MySpace icon or enter a URL pointing to your custom Facebook icon. If SWYN is enabled for MySpace in a paragraph, this graphic will be shown. The maximum width is 30 pixels.
Xing	Upload a custom Xing icon or enter a URL pointing to your custom Facebook icon. If SWYN is enabled for Xing in a paragraph, this graphic will be shown. The maximum width is 30 pixels.

Products tab

This paragraph type contains common fields to enter product details such as old/current price, product category, description etc. You can define the order of these fields in this tab. By default, no formatting is used in the designated fields. If you want to format the text entered in the fields of this paragraph, use the formatting tools of the editor or – if you use a content interface – commit HTML formatting tags.

Parameter	Description
Order...	

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Parameter	Description
Position 1	Enter a product name or title.
Position 2	Enter the product category, article group or genre.
Position 3	Enter an author, artist or manufacturer of the product or work.
Position 4	Enter a description of the product or work.
Position 5	Use this field in combination with the field **Current Price** for price reductions and bargains, special offers etc.
Position 6	Enter the current or new price here.

Content interface tab

This tab allows you to define up to five alternative layouts for content of the content interface by freely inputting HTML or text. You can select the required layout from within the content interface paragraph.

Source text entered here is adopted into the newsletter without any further checks.

All desired formatting of text and links must be prepared in HTML format.

You need knowledge of HTML and particularly of HTML in emails to create new layouts or edit the default layout. Using corrupt or not supported code in a layout may cause severe errors in the newsletter display.

Parameter	Description
Layout 1...5	
Desktop version	Enter the source text for the desktop version here.
Mobile version	Enter the source text for the mobile version here.
Text version	Enter the source text for the text version here.

Inserting content

The content from the content interface is available as the following Velocity variables, and can be inserted into the source text:

- Status variables - information on current item paragraphs
- Present variables - for using queries that check for the presence of an element
- Value variables - for issuing the content

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Notes for the creation of new layouts

- **Font definitions**: When using an alternative layout variant, all font definitions must be available in the entered HTML. The text is not formatted by the Template Kit to give you more freedom in terms of the visual design. Conversely, this means that any links in flowing text must be provided already correctly formatted by the content interface. There are also variables that insert the text in question in a pre-formatted manner (e.g. `$text1FormattedValue`). In this case, the text is formatted by the Template Kit.
- **Width specifications**: As is the case with all other content paragraphs, the content interface paragraph may vary in width. When using an alternative layout variant, you should try to work only with percentage specifications or without any width specifications at all wherever possible. However, you can still work with fixed widths if the content interface paragraph is always used in the same configuration or if a separate layout variant is defined for each of the different paragraph widths.
- **Risk of display errors**: When freely entering HTML for the desktop and mobile version, you are responsible for ensuring that the content displays correctly in the different email programs or web mailers. In the worst-case scenario, serious display errors may occur.

Status variables

Parameter	Default	Description
$first	boolean	is `true` if it is the first item in the content interface paragraph, or is otherwise `false`.
$index	integer	Contains the position of the item within the content interface paragraph as a number (1 for the first item, 2 for the second item etc.).
$last	boolean	is `true` if it is the last item in the content interface paragraph, or is otherwise `false`.

Present variables

Variable	Type	Description
$text1Present	boolean	contains `true` if content is present for the **Text 1** field, or otherwise `false`.

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Variable	Type	Description
$text2Present	boolean	contains `true` if content is present for the **Text 2** field, or otherwise `false`.
$text3Present	boolean	contains `true` if content is present for the **Text 3** field, or otherwise `false`.
$text4Present	boolean	contains `true` if content is present for the **Text 4** field, or otherwise `false`.
$text5Present	boolean	contains `true` if content is present for the **Text 5** field, or otherwise `false`.
$text6Present	boolean	contains `true` if content is present for the **Text 6** field, or otherwise `false`.
$text7Present	boolean	contains `true` if content is present for the **Text 7** field, or otherwise `false`.
$text8Present	boolean	contains `true` if content is present for the **Text 8** field, or otherwise `false`.
$text9Present	boolean	contains `true` if content is present for the **Text 9** field, or otherwise `false`.
$text10Present	boolean	contains `true` if content is present for the **Text 10** field, or otherwise `false`.
$link1TextPresent	boolean	contains `true` if content is present for the **Text** field in the **Link 1** group, or otherwise `false`.
$link1UrlPresent	boolean	contains `true` if content is present for the **URL** field in the **Link 1** group, or otherwise `false`.
$link2TextPresent	boolean	contains `true` if content is present for the **Text** field in the **Link 2** group, or otherwise `false`.
$link2UrlPresent	boolean	contains `true` if content is present for the **URL** field in the **Link 2** group, or otherwise `false`.
$link3TextPresent	boolean	contains `true` if content is present for the **Text** field in the **Link 3** group, or otherwise `false`.
$link2UrlPresent	boolean	contains `true` if content is present for the **URL** field in the **Link 3** group, or otherwise `false`.

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Variable	Type	Description
$image1ImageUrlPresent	boolean	contains `true` if content is present for the **Image** field in the **Image 1** group in the **Images** tab, or otherwise `false`.
$image1AltTextPresent	boolean	contains `true` if content is present for the **Alternative text** field in the **Image 1** group in the **Images** tab, or otherwise false.
$image1LinkPresent	boolean	contains `true` if content is present for the **Link** field in the **Image 1** group in the **Images** tab, or otherwise `false`.
$image2ImageUrlPresent	boolean	contains `true` if content is present for the **Image** field in the **Image 2** group in the **Images** tab, or otherwise `false`.
$image2AltTextPresent	boolean	contains `true` if content is present for the **Alternative text** field in the **Image 2** group in the **Images** tab, or otherwise `false`.
$image2LinkPresent	boolean	contains `true` if content is present for the **Link** field in the **Image 2** group in the **Images** tab, or otherwise `false`.
$image3ImageUrlPresent	boolean	contains `true` if content is present for the **Image** field in the **Image 3** group in the **Images** tab, or otherwise `false`.
$image3AltTextPresent	boolean	contains `true` if content is present for the **Alternative text** field in the **Image 3** group in the **Images** tab, or otherwise `false`.
$image3LinkPresent	boolean	contains `true` if content is present for the **Link** field in the **Image 3** group in the **Images** tab, or otherwise `false`.
$image4ImageUrlPresent	boolean	contains `true` if content is present for the **Image** field in the **Image 4** group in the **Images** tab, or otherwise `false`.
$image4AltTextPresent	boolean	contains `true` if content is present for the **Alternative text** field in the **Image 4** group in the **Images** tab, or otherwise `false`.
$image4LinkPresent	boolean	contains `true` if content is present for the **Link** field in the **Image 4** group in the **Images** tab, or otherwise `false`.
$image5ImageUrlPresent	boolean	contains `true` if content is present for the **Image** field in the **Image 5** group in the **Images** tab, or otherwise `false`.
$image5AltTextPresent	boolean	contains `true` if content is present for the **Alternative text**

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Variable	Type	Description
		field in the **Image 5** group in the **Images** tab, or otherwise `false`.
$image5LinkPresent	boolean	contains `true` if content is present for the **Link** field in the **Image 5** group in the **Images** tab, or otherwise `false`.
$image6ImageUrlPresent	boolean	contains `true` if content is present for the **Image** field in the **Image 6** group in the **Images** tab, or otherwise `false`.
$image6AltTextPresent	boolean	contains `true` if content is present for the **Alternative text** field in the **Image 6** group in the **Images** tab, or otherwise `false`.
$image6LinkPresent	boolean	contains `true` if content is present for the **Link** field in the **Image 6** group in the **Images** tab, or otherwise `false`.

Value variables

Variable	Type	Environment	Description
$text1Value	string	Desktop, mobile, text	Contains the unchanged content from the **Text 1** field.
$text1FormattedValue	string	Desktop, mobile	Contains the edited content from the **Text 1** field.
$text1FormattedAsHeadlineValue	string	Desktop, mobile	Contains the edited content from the **Text 1** field. The text is provided in the formatting for headings, and is linked to the URL for **Link 1**.
$text2Value	string	Desktop, mobile, text	Contains the unchanged content from the **Text 2** field.
$text2FormattedValue	string	Desktop, mobile	Contains the edited content from the **Text 2** field.
$text3Value	string	Desktop, mobile, text	Contains the unchanged content from the **Text 3** field.
$text3FormattedValue	string	Desktop, mobile	Contains the edited content from the **Text 3** field.
$text4Value	string	Desktop,	Contains the unchanged content from

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Variable	Type	Environment	Description
		mobile, text	the **Text 4** field.
$text4FormattedValue	string	Desktop, mobile	Contains the edited content from the **Text 4** field.
$text5Value	string	Desktop, mobile, text	Contains the unchanged content from the **Text 5** field.
$text5FormattedValue	string	Desktop, mobile	Contains the edited content from the **Text 5** field.
$text6Value	string	Desktop, mobile, text	Contains the unchanged content from the **Text 6** field.
$text6FormattedValue	string	Desktop, mobile	Contains the edited content from the **Text 6** field.
$text7Value	string	Desktop, mobile, text	Contains the unchanged content from the **Text 7** field.
$text7FormattedValue	string	Desktop, mobile	Contains the edited content from the **Text 7** field.
$text8Value	string	Desktop, mobile, text	Contains the unchanged content from the **Text 8** field.
$text8FormattedValue	string	Desktop, mobile	Contains the edited content from the **Text 8** field.
$text9Value	string	Desktop, mobile, text	Contains the unchanged content from the **Text 9** field.
$text9FormattedValue	string	Desktop, mobile	Contains the edited content from the **Text 9** field.
$text10Value	string	Desktop, mobile, text	Contains the unchanged content from the **Text 10** field.
$text10FormattedValue	string	Desktop, mobile	Contains the edited content from the **Text 10** field.
$link1TextValue	string	Desktop, mobile, text	Contains the unchanged content from the **Text** field in the **Link 1** group.
$link1UrlValue	string	Desktop,	Contains the unchanged content from

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Variable	Type	Environment	Description
		mobile, text	the **URL** field in the **Link 1** group.
$link1FormattedValue	string	Desktop, mobile	Contains the edited content from the **Text** field in the **Link 1** group. The text is provided in the formatting for links, and is linked to the URL for **Link 1**.
$link2TextValue	string	Desktop, mobile, text	Contains the unchanged content from the **Text** field in the **Link 2** group.
$link2UrlValue	string	Desktop, mobile, text	Contains the unchanged content from the **URL** field in the **Link 2** group.
$link2FormattedValue	string	Desktop, mobile	Contains the edited content from the **Text** field in the **Link 2** group. The text is provided in the formatting for links, and is linked to the URL for **Link 2**.
$link3TextValue	string	Desktop, mobile, text	Contains the unchanged content from the **Text** field in the **Link 3** group.
$link3UrlValue	string	Desktop, mobile, text	Contains the unchanged content from the **URL** field in the **Link 3** group.
$link3FormattedValue	string	Desktop, mobile	Contains the edited content from the **Text** field in the **Link 3** group. The text is provided in the formatting for links, and is linked to the URL for **Link 3**.
$image1ImageUrlValue	string	Desktop, mobile	Contains the image address of **Image 1**.
$image1AltTextValue	string	Desktop, mobile, text	Contains the unchanged content from the **Alternative text** field in the **Image 1** group.
$image1LinkValue	string	Desktop, mobile, text	Contains the unchanged content from the **Link** field in the **Image 1** group.
$image1FormattedValue	string	Mobile	Contains the complete HTML source text from **Image 1** with alternative text and link. The image width is set to 100% (available width).

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Variable	Type	Environment	Description
$image1FullFormattedValue	string	Desktop	Contains the complete HTML source text from **Image 1** with alternative text and link. The maximum image width is the available paragraph width.
$image1HalfFormattedValue	string	Desktop	Contains the complete HTML source text from **Image 1** with alternative text and link. The maximum image width is half of the available paragraph width.
$image2ImageUrlValue	string	Desktop, mobile	Contains the image address of **Image 2**.
$image2AltTextValue	string	Desktop, mobile, text	Contains the unchanged content from the **Alternative text** field in the **Image 2** group.
$image2LinkValue	string	Desktop, mobile, text	Contains the unchanged content from the **Link** field in the **Image 2** group.
$image2FormattedValue	string	Mobile	Contains the complete HTML source text from **Image 2** with alternative text and link. The image width is set to 100% (available width).
$image2FullFormattedValue	string	Desktop	Contains the complete HTML source text from **Image 2** with alternative text and link. The maximum image width is the available paragraph width.
$image2HalfFormattedValue	string	Desktop	Contains the complete HTML source text from **Image 2** with alternative text and link. The maximum image width is half of the available paragraph width.
$image3ImageUrlValue	string	Desktop, mobile	Contains the image address of **Image 3**.
$image3AltTextValue	string	Desktop, mobile, text	Contains the unchanged content from the **Alternative text** field in the **Image 3** group.
$image3LinkValue	string	Desktop,	Contains the unchanged content from

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Variable	Type	Environment	Description
		mobile, text	the **Link** field in the **Image 3** group.
$image3FormattedValue	string	Mobile	Contains the complete HTML source text from **Image 3** with alternative text and link. The image width is set to 100% (available width).
$image3FullFormattedValue	string	Desktop	Contains the complete HTML source text from **Image 3** with alternative text and link. The maximum image width is the available paragraph width.
$image3HalfFormattedValue	string	Desktop	Contains the complete HTML source text from **Image 3** with alternative text and link. The maximum image width is half of the available paragraph width.
$image4ImageUrlValue	string	Desktop, mobile	Contains the image address of **Image 4**.
$image4AltTextValue	string	Desktop, mobile, text	Contains the unchanged content from the **Alternative text** field in the **Image 4** group.
$image4LinkValue	string	Desktop, mobile, text	Contains the unchanged content from the **Link** field in the **Image 4** group.
$image4FormattedValue	string	Mobile	Contains the complete HTML source text from **Image 4** with alternative text and link. The image width is set to 100% (available width).
$image4FullFormattedValue	string	Desktop	Contains the complete HTML source text from **Image 4** with alternative text and link. The maximum image width is the available paragraph width.
$image4HalfFormattedValue	string	Desktop	Contains the complete HTML source text from **Image 4** with alternative text and link. The maximum image width is half of the available paragraph width.
$image5ImageUrlValue	string	Desktop,	Contains the image address of **Image**

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Variable	Type	Environment	Description
		mobile	**5**.
$image5AltTextValue	string	Desktop, mobile, text	Contains the unchanged content from the **Alternative text** field in the **Image 5** group.
$image5LinkValue	string	Desktop, mobile, text	Contains the unchanged content from the **Link** field in the **Image 5** group.
$image5FormattedValue	string	Mobile	Contains the complete HTML source text from **Image 5** with alternative text and link. The image width is set to 100% (available width).
$image5FullFormattedValue	string	Desktop	Contains the complete HTML source text from **Image 5** with alternative text and link. The maximum image width is the available paragraph width.
$image5HalfFormattedValue	string	Desktop	Contains the complete HTML source text from **Image 5** with alternative text and link. The maximum image width is half of the available paragraph width.
$image6ImageUrlValue	string	Desktop, mobile	Contains the image address of **Image 6**.
$image6AltTextValue	string	Desktop, mobile, text	Contains the unchanged content from the **Alternative text** field in the **Image 6** group.
$image6LinkValue	string	Desktop, mobile, text	Contains the unchanged content from the **Link** field in the **Image 6** group.
$image6FormattedValue	string	Mobile	Contains the complete HTML source text from **Image 6** with alternative text and link. The image width is set to 100% (available width).
$image6FullFormattedValue	string	Desktop	Contains the complete HTML source text from **Image 6** with alternative text and link. The maximum image width is the available paragraph width.

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Variable	Type	Environment	Description
$image6HalfFormattedValue	string	Desktop	Contains the complete HTML source text from **Image 6** with alternative text and link. The maximum image width is half of the available paragraph width.
$editBar	string	Desktop, mobile	Inserts the paragraph button bar. This is required to integrate the button bar into the table, such as when implementing adjacent items. If this variable is not available, the button bar will be placed above the item.

Examples of alternative layout variants

The examples show the source text for the standard layout and can be adapted for alternative layout variants.

Remove all HTML comments, blank lines and spaces when transferring HTML into the Template Kit. If you do not do this, then these elements will be included when sending, and will cause the newsletter source text to "swell".

Desktop version

```
<table width="100%" border="0" cellpadding="0" cellspacing="0">
    <tr>
        <td width="100%">
            #set($displaySeparator = false)
            #if("$text1Present" == "true")
                $text1FormattedAsHeadlineValue
                #set($displaySeparator = true)
            #end

            #if("$image1ImageUrlPresent" == "true")
                #if("$text1Present" == "true")
                    <table width="10" border="0" cellpadding="0" cell-
spacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
```

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```
                    #set($displaySeparator = false)
                #end
                <table border="0" cellspacing="0" cellpadding="0" align-
n="right">
                    <tr>
                        <td width="10"></td>
                        <td>
                            #if("$image1LinkPresent" != "true" &&
"$link1UrlPresent" == "true")
                                <a href="$link1UrlValue" target="_blank">
                            #end
                            $image1HalfFormattedValue
                            #if("$image1LinkPresent" != "true" &&
"$link1UrlPresent" == "true")
                                </a>
                            #end
                        </td>
                    </tr>
                </table>
            #end

            #if("$text2Present" == "true")
                #if($displaySeparator)
                    <table width="10" border="0" cellpadding="0" cell-
spacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
                #end
                $text2FormattedValue
                #set($displaySeparator = true)
            #end

            #if("$text3Present" == "true")
                #if($displaySeparator)
                    <table width="10" border="0" cellpadding="0" cell-
spacing="0">
                        <tr>
                            <td width="10" height="10"></td>
```

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```
                    </tr>
                </table>
            #end
            $text3FormattedValue
            #set($displaySeparator = true)
        #end

        #if("$text4Present" == "true")
            #if($displaySeparator)
                <table width="10" border="0" cellpadding="0" cell-
spacing="0">
                    <tr>
                        <td width="10" height="10"></td>
                    </tr>
                </table>
            #end
            $text4FormattedValue
            #set($displaySeparator = true)
        #end

        #if("$text5Present" == "true")
            #if($displaySeparator)
                <table width="10" border="0" cellpadding="0" cell-
spacing="0">
                    <tr>
                        <td width="10" height="10"></td>
                    </tr>
                </table>
            #end
            $text5FormattedValue
            #set($displaySeparator = true)
        #end

        #if("$text6Present" == "true")
            #if($displaySeparator)
                <table width="10" border="0" cellpadding="0" cell-
spacing="0">
                    <tr>
                        <td width="10" height="10"></td>
                    </tr>
```

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```
                    </table>
                #end
                $text6FormattedValue
                #set($displaySeparator = true)
            #end

            #if("$text7Present" == "true")
                #if($displaySeparator)
                    <table width="10" border="0" cellpadding="0" cell-
spacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
                #end
                $text7FormattedValue
                #set($displaySeparator = true)
            #end

            #if("$text8Present" == "true")
                #if($displaySeparator)
                    <table width="10" border="0" cellpadding="0" cell-
spacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
                #end
                $text8FormattedValue
                #set($displaySeparator = true)
            #end

            #if("$text9Present" == "true")
                #if($displaySeparator)
                    <table width="10" border="0" cellpadding="0" cell-
spacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
```

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```
                #end
                $text9FormattedValue
                #set($displaySeparator = true)
            #end

            #if("$text10Present" == "true")
                #if($displaySeparator)
                    <table width="10" border="0" cellpadding="0" cell-
spacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
                #end
                $text10FormattedValue
                #set($displaySeparator = true)
            #end

            #if("$link1TextPresent" == "true" && "$link1UrlPresent" ==
"true")
                #if($displaySeparator)
                    <table width="10" border="0" cellpadding="0" cell-
spacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
                #end
                $link1FormattedValue
                #set($displaySeparator = true)
            #end

            #if("$link2TextPresent" == "true" && "$link2UrlPresent" ==
"true")
                #if($displaySeparator)
                    <table width="10" border="0" cellpadding="0" cell-
spacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
```

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```
                    </table>
                #end
                $link2FormattedValue
                #set($displaySeparator = true)
            #end

            #if("$link3TextPresent" == "true" && "$link3UrlPresent" ==
"true")
                #if($displaySeparator)
                    <table width="10" border="0" cellpadding="0" cell-
spacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
                #end
                $link3FormattedValue
                #set($displaySeparator = true)
            #end
        </td>
    </tr>
    <tr>
        <td width="100%" height="10"><!-- --></td>
    </tr>
</table>
```

Mobile version

```
#set($displaySeparator = false)
#if("$text1Present" == "true")
    $text1FormattedAsHeadlineValue
    #set($displaySeparator = true)
#end
#if("$image1ImageUrlPresent" == "true")
    #if("$text1Present" == "true")
        <div style="height: 10px;"></div>
        #set($displaySeparator = false)
    #end
    <div style="float: right; margin-left: 10px; max-width: 50%;">
        #if("$image1LinkPresent" != "true" && "$link1UrlPresent" ==
```

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```
"true")
            <a href="$link1UrlValue" target="_blank">
        #end
        $image1FormattedValue
        #if("$image1LinkPresent" != "true" && "$link1UrlPresent" ==
"true")
            </a>
        #end
    </div>
#end
#if("$text2Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text2FormattedValue
    #set($displaySeparator = true)
#end
#if("$text3Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text3FormattedValue
    #set($displaySeparator = true)
#end
#if("$text4Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text4FormattedValue
    #set($displaySeparator = true)
#end
#if("$text5Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text5FormattedValue
    #set($displaySeparator = true)
#end
#if("$text6Present" == "true")
    #if($displaySeparator)
```

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```
            <div style="height: 10px;"></div>
        #end
        $text6FormattedValue
        #set($displaySeparator = true)
    #end
    #if("$text7Present" == "true")
        #if($displaySeparator)
            <div style="height: 10px;"></div>
        #end
        $text7FormattedValue
        #set($displaySeparator = true)
    #end
    #if("$text8Present" == "true")
        #if($displaySeparator)
            <div style="height: 10px;"></div>
        #end
        $text8FormattedValue
        #set($displaySeparator = true)
    #end
    #if("$text9Present" == "true")
        #if($displaySeparator)
            <div style="height: 10px;"></div>
        #end
        $text9FormattedValue
        #set($displaySeparator = true)
    #end
    #if("$text10Present" == "true")
        #if($displaySeparator)
            <div style="height: 10px;"></div>
        #end
        $text10FormattedValue
        #set($displaySeparator = true)
    #end
    #if("$link1TextPresent" == "true" && "$link1UrlPresent" == "true")
        #if($displaySeparator)
            <div style="height: 10px;"></div>
        #end
        $link1FormattedValue
        #set($displaySeparator = true)
    #end
```

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```
#if("$link2TextPresent" == "true" && "$link2UrlPresent" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $link2FormattedValue
    #set($displaySeparator = true)
#end
#if("$link3TextPresent" == "true" && "$link3UrlPresent" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $link3FormattedValue
    #set($displaySeparator = true)
#end
<div style="clear: both; height: 10px;"><!-- --></div>
```

Text version

```
#set($displaySeparator = false)#if("$text1Present" == "true")#if($dis-
playSeparator)


#end$!{null}$text1Value#set($displaySeparator = true)#end$!{null}#if
("$text2Present" == "true")#if($displaySeparator)


#end$!{null}$text2Value#set($displaySeparator = true)#end$!{null}#if
("$text3Present" == "true")#if($displaySeparator)


#end$!{null}$text3Value#set($displaySeparator = true)#end$!{null}#if
("$text4Present" == "true")#if($displaySeparator)


#end$!{null}$text4Value#set($displaySeparator = true)#end$!{null}#if
("$text5Present" == "true")#if($displaySeparator)


#end$!{null}$text5Value#set($displaySeparator = true)#end$!{null}#if
("$text6Present" == "true")#if($displaySeparator)
```

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```
#end$!{null}$text6Value#set($displaySeparator = true)#end$!{null}#if
("$text7Present" == "true")#if($displaySeparator)


#end$!{null}$text7Value#set($displaySeparator = true)#end$!{null}#if
("$text8Present" == "true")#if($displaySeparator)


#end$!{null}$text8Value#set($displaySeparator = true)#end$!{null}#if
("$text9Present" == "true")#if($displaySeparator)


#end$!{null}$text9Value#set($displaySeparator = true)#end$!{null}#if
("$text10Present" == "true")#if($displaySeparator)


#end$!{null}$text10Value#set($displaySeparator = true)#end$!{null}#if
("$link1TextPresent" == "true" && "$link1UrlPresent" == "true")#if($dis-
playSeparator)


#end$!{null}$link1TextValue
$link1UrlValue#set($displaySeparator = true)#end$!{null}#if("$link2Tex-
tPresent" == "true" && "$link2UrlPresent" == "true")#if($dis-
playSeparator)


#end$!{null}$link2TextValue
$link2UrlValue#set($displaySeparator = true)#end$!{null}#if("$link3Tex-
tPresent" == "true" && "$link3UrlPresent" == "true")#if($dis-
playSeparator)


#end$!{null}$link3TextValue
$link3UrlValue#set($displaySeparator = true)#end$!{null}#if("$im-
age1ImageUrlPresent" == "true" && "$image1AltTextPresent" == "true" &&
("$image1LinkPresent" == "true" || "$link1UrlPresent" == "true"))#if($dis-
playSeparator)
```

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```
#end$!{null}$image1AltTextValue
#if("$image1LinkPresent" == "true")$image1LinkValue$!{null}#else$!
{null}$link1UrlValue#end#end$!{null}
```

RSS feeds tab

In this tab you can define one or more layout variants for RSS feed articles. Within the RSS feed paragraph you can select the layout to be used.

Source code entered in this tab will be rendered into the newsletter without further checking. The formatting of text and links must be written in HTML code.

You need knowledge of HTML and particularly of HTML in emails to setup this paragraph. Using corrupt or not supported code in a layout may cause severe errors in the newsletter display.

Parameter	Description
Placeholder for the RSS feed URL...	
Value for {placeholder1}...Value for {placeholder1}	In the RSS feed paragraph, switch to the **RSS feed** tab and insert the placeholder {placeholder1}, {placeholder3} or {placeholder3} in the **URL** box. Before the RSS feed is retrieved, this placeholder will be replaced with the value entered here.
Order (standard layout)...	
Position 1	Select the content to be displayed here.
Position 2	Select the content to be displayed here.
Position 3	Select the content to be displayed here.
Position 4	Select the content to be displayed here.
Layout 1...5	
Desktop version	Enter the source code for the desktop version of your newsletter.
Mobile version	Enter the source code for the mobile version of your newsletter.
Text version	Enter the source code for the text version of your newsletter.

Inserting content

Content from an RSS feed is present as velocity variables and can be inserted into the source text this way. These include so-called status variables (information on current article paragraphs), present

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variables (for using queries that check the presence of an element) and value variables (for releasing content).

Important notes

- **Font definitions**: When using alternate layout options, all font definitions must be present in the HTML you enter. The Template Kit does not format the texts, allowing you to choose your preferred design. Conversely, this also means that links in continuous text (if used) must be formatted accordingly in the RSS feed.
- **Width specifications**: As with all other content paragraphs, an RSS feed paragraph may vary in width. When using an alternative layout, you should preferably only work with percentages or, alternatively, not apply width specifications. Otherwise you are free to work with fixed widths, as long as the RSS feed paragraph is always used in the same configuration or a separate layout variant is defined for each of the different paragraph widths.
- **Aspect ratio**: The Template Kit edits images only to a limited degree if an alternative layout option is used (whatever content width is present will be applied as the maximum width). You should therefore provide images that already have the required width. In addition, you can also scale the image with your browser by setting a specified width in HTML. This is not recommended, however, since applications e.g. Outlook, will ignore this information and display the image in its original size.
- **Link alignment/Image position**: These options are inoperative when using an alternative layout. The arrangement/positioning of elements is set by the HTML
- **Risk of display errors**: When manually entering HTML for desktop and mobile versions, you must make sure that the content displays properly in a variety of email programs and web mailers. Worst case, this can lead to serious display errors.

Status variables

Variable	Type	Description
rssItemFirst	boolean	Is `true`, if it is the first article of the RSS feed paragraph, otherwise `false`.
rssItemIndex	integer	Shows the position of the article within the RSS feed paragraph as a number (1 for the first article, 2 for the second article etc.).
rssItemLast	boolean	Is `true`, if it is the last article of the RSS feed paragraph, otherwise `false`.

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Present variables

Variable	Type	Description
rssTitlePresent	boolean	Contains `true`, if content is present for the **Title** box, otherwise `false`.
rssTextPresent	boolean	Contains `true`, if content is present for the **Text** box, otherwise `false`.
rssAuthorPresent	boolean	Contains `true`, if content is present for the **Author** box, otherwise `false`.
rssDatePresent	boolean	Contains `true`, if content is present for the **Date** box, otherwise `false`.
rssCategoriesPresent	boolean	Contains `true`, if content is present for the **Categories** box, otherwise `false`.
rssLinkTextPresent	boolean	Contains `true`, if content is present for the **Text** box in the **Link** group, otherwise `false`.
rssLinkUrlPresent	boolean	Contains `true`, if content is present for the **URL** box in the **Link** group, otherwise `false`.
rssCommentsLinkTextPresent	boolean	Contains `true`, if content is present for the **Text** box in the **Link to the comments** group, otherwise `false`.
rssCommentsLinkUrlPresent	boolean	Contains `true`, if content is present for the **URL** box in the **Link to the comments** group, otherwise `false`.
rssImageUrlPresent	boolean	Contains `true`, if content is present for the **Image** box (Upload file) in the **Image** tab, otherwise `false`.
rssImageAltTextPresent	boolean	Contains `true`, if content is present for the **Alternative text** box in the **Image** tab, otherwise `false`.
rssImageLinkPresent	boolean	Contains `true`, if content is present for the **Link** box in the **Image** tab, otherwise `false`.

Value variables

Variable	Type	Description
rssTitleValue	string	Contains content for the **Title** box.

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Variable	Type	Description
rssTextValue	string	Contains content for the **Text** box.
rssAuthorValue	string	Contains content for the **Author** box.
rssDateValue	string	Contains content for the **Date** box.
rssCategoriesValue	string	Contains content for the **Categories** box.
rssLinkTextValue	string	Contains content for the **Text** box in the **Link** group.
rssLinkUrlValue	string	Contains content for the **URL** box in the **Link** group.
rssCommentsLinkTextValue	string	Contains content for the **Text** box in the **Link to the comments** group.
rssCommentsLinkUrlValue	string	Contains content for the **URL** box in the **Link to the comments** group.
rssImageUrlValue	string	Contains the image URL (Upload Image) for the **Image** tab.
rssImageAltTextValue	string	Contains content for the **Alternative Text** for the **Image** tab.
rssImageLinkValue	string	Contains content for the **Link** box for the **Image** tab.
editBar	string	Inserts the button bar for the RSS feed article. This is necessary when placing articles side-by-side, for example, to integrate the button bar into the table. If this variable is not present, the button bar will be placed above the article.

Example for an alternative layout

The example creates a two-columned layout using a width of 580 pixels.

Remove all HTML comments, whitespaces, blank lines when copying the HTML to the Template Kit. They may be sent along with the newsletter and thus expand the newsletter source code.

```
<!-- This query ensures that content is only displayed if the contents
used for this layout are available. -->
#if($rssTitlePresent || $rssImageUrlPresent || $rssAuthorPresent ||
$rssDatePresent || $rssTextPresent || ($rssLinkTextPresent &&
$rssLinkUrlPresent))
    <!-- To enable the two-column layout, a border table is opened in the
```

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```
first RSS feed article. -->
    #if($rssItemFirst)
        <table border="0" cellpadding="0" cellspacing="0">
            <tr>
    #end

    <!-- For every article, a table cell with half the width is created.
This table cell contains the entire contents of the RSS feed item. -->
    <td width="280" align="left" valign="top">

        <!-- The button bar is placed here so it is displayed above the
corresponding RSS feed article. -->
        $editBar
        #if($rssTitlePresent)
            <font size="2" face="Arial, sans-serif" color="#000001" style-
e="font-size: 14px;"><b>
                #if($rssLinkUrlPresent)
                    <a href="$rssLinkUrlPresent" style="color: #000001;
text-decoration: none;" target="_blank">
                #end
                    <font size="2" face="Arial, sans-serif" col-
or="#000001" style="font-size: 14px;"><b>$rssTitleValue</b></font>
                #if($rssLinkUrlPresent)
                    </a>
                #end
            </b></font>
            <table width="100%" cellspacing="0" cellpadding="0" bor-
der="0">
                <tr>
                    <td width="100%" height="10"></td>
                </tr>
            </table>
        #end

        #if($rssImageUrlPresent)
            #if($rssImageLinkPresent)
                <a href="$rssImageLinkValue" target="_blank">
            #end
            #if(!$rssImageLinkPresent && $rssLinkUrlPresent)
                <a href="$rssLinkUrlValue" target="_blank">
```

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```
            #end
            <!-- An image width of 130 pixels is specified. You should
provide an image that already have the required width. Otherwise it will
be stretched or compressed. -->
            <img src="$rssImageUrlValue" alt="$rssImageAltTextValue"
width="130" border="0" align="right" style="display: block; float:
right;" />
            #if($rssImageLinkPresent || $rssLinkUrlPresent)
                </a>
            #end
        #end

        #if($rssAuthorPresent || $rssDatePresent || $rssTextPresent)
            <font size="1" face="Arial, sans-serif" color="#666666" style-
e="font-size: 11px;">
                #if($rssDatePresent || $rssAuthorPresent)
                    <span style="font-size: 10px;">
                        $rssDateValue
                        #if($rssDatePresent && $rssAuthorPresent)
                            |
                        #end
                        $rssAuthorValue
                    </span>
                    <table width="100%" cellspacing="0" cellpadding="0"
border="0">
                        <tr>
                            <td width="100%" height="10"></td>
                        </tr>
                    </table>
                #end
                $rssTextValue
            </font>
        #end

        #if($rssLinkTextPresent && $rssLinkUrlPresent)
            <font size="1" face="Arial, sans-serif" color="#666666" style-
e="font-size: 11px; line-height: 11px;">
                &ndash;
                <nobr>
                    <a href="$rssLinkUrlValue" style="line-height: 11px;
```

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```
color: #666666; text-decoration: underline;" target="_blank">
                        <font size="1" face="Arial, sans-serif" col-
or="#666666" style="font-size: 11px;">
                            <u>$rssLinkTextValue</u>
                        </font>
                    </a>
                </nobr>
            </font>
        #end
    <!-- After every first (left-aligned) RSS feed article, the table
cell is closed and a new one is opened. -->
    #if($rssItemIndex % 2 == 1)
        </td>
        <td width="20"></td>
    <!-- After every second (right-aligned) RSS feed article, the above
opened table is closed, some space is inserted and a table is opened. -->
    #else
                </td>
            </tr>
        </table>
        #if(!$rssItemLast)
            <table width="580" border="0" cellpadding="0" cell-
spacing="0">
                <tr>
                    <td width="580" height="20"></td>
                </tr>
            </table>
        #end
        <table border="0" cellpadding="0" cellspacing="0">
            <tr>
    #end

    <!-- After the last RSS feed article the table is closed. -->
    #if($rssItemLast)
            </tr>
        </table>
    #end

#end
```

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Tracking tab

All outgoing links can be extended with tracking parameters. With the help of web analytics software these parameters can be used to analyze the click behavior. You can define up to five tracking parameters. Every parameter consists of a key (parameter name) and a value.

Parameter	Description
Parameter 1...5	
Key	Enter the name of the parameter.
Value	Enter the value of the parameter (integer or string).

Text version tab

If you do not wish to use the automatic generated text version, which is created from the contents you enter in the template editor, you can here enter a text version for the complete newsletter. Be aware that no content will be converted automatically into the text version, if this option has been enabled.

Parameter	Description
Alternative text version...	
Activated	By default, this check box is cleared and the text version created automatically. If you enable this option, you must enter a text version manually in the field below. Otherwise no text version will be sent with your mailing.
Text	Enter the text in this field. Be aware that you cannot use HTML or other formatting in the text version. Only line breaks and special characters (e.g. ****** or ++++++) can be used to structure the newsletter.

Mobile tab

In this tab you can activate an optimized version of your mailing for mobile devices. This version will be sent together with the desktop version and displayed on smartphones and tablet PCs.

Parameter	Description
General...	
Activate mobile version	Select this check box to create a mobile version of the newsletter. By default, all contents are included in the mobile version. You can define for each paragraph, whether it is displayed or omitted in the mobile version. Be aware that the size of each email will approximately increase by 50-100 KB if it contains a mobile version.
Click	Select a click profile that will be assigned to each recipient who clicks in the mobile

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Parameter	Description
profile	version. Use this click profile to analyze the usage of the mobile version or to create target groups containing mobile users.
Activate link extension	Select this check box to append an additional parameter **mobile** with a value of `1` to all links within the mobile version of the newsletter. This way, the links of the mobile version are tracked separately and made available in the advanced reports. Additionally, you can use click profiles to achieve an even more convenient reporting.

[1] This feature is only available in Germany.

Pre-header

→ Click New: Pre-Header in the template editor to insert a paragraph that can contain useful information that precede the actual newsletter content.

For example, place here the unsubscribe link or a hint how to add the sender to the recipients address book etc. You can use several pre-headers and assign them to target groups to show some information only to certain recipient segments.

→ Change the settings (described in the following) as desired and confirm your entries by clicking Apply.

- General tab
- Options tab
- Click profiles tab
- Target groups tab

General tab

Parameter	Description
Content...	
Text	Enter the text of the pre-header, for example, a reference and link to the online version .
Show in online version	Select this check box to include this paragraph in the online version of the mailing.
Show in desktop version	Select this check box to include this paragraph in the desktop version of the mailing.

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Parameter	Description
Show in mobile version	Select this check box to include this paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect. If you disabled the mobile version , this option has no function.
Show in text version	Select this check box to include this paragraph in the text version of the mailing.

Options tab

If the pre-header should get a different layout from the default settings, define it in this tab.

Parameter	Description
Layout...	
Width	If you want to use a width different from the newsletter default, enter an integer value in pixels here.
Alignment	Select a value from the drop-down menu to overwrite the inherited value from the general newsletter settings.
Background color	The background color must be entered as a hexadecimal value, preceded by the # character. Click the green triangle to open a list with default web color and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal color may vary, depending on the browser or email client of the recipient.
Padding	The value must be an integer value.
Mobile...	
Width	Enter the width of the mobile version of the newsletter in percentage.

Click profiles tab

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See the Click profiles section if you want to create click profiles.

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Target groups tab

Parameter	Description
Target groups	If you want the pre-header only to be shown to a certain recipient segment, select one or more target groups here. If more than one target groups are selected, just one must match (OR logic). See the Target groups section if you want to create target groups.

Support address book entries using pre-headers

The so-called pre-header is the first text part of the newsletter which is positioned above the actual content. In most cases, the pre-header will be used to present a hint similar to this one: "If this message is not displayed correctly, please click here." This link will take the reader to the online version of the respective newsletter. This is useful as many email programs and providers (such as Outlook, Hotmail, Googlemail) block the display of images by default and the visual quality of the newsletter may thus be impaired.

However, clicking on the link to the online version and/or reloading the newsletter images (right mouse click on the blocked images) constitutes an additional step for subscribers, which may lead to them closing the newsletter prematurely, immediately deleting or—in the worst case—marking it as spam.

During the first weeks of subscription, you should therefore additionally use the pre-header to ask the recipient to add your mailing address to his personal email address book. This is because email sent from known addresses is immediately displayed in full, including all images, by many email programs and providers (such as Googlemail, Hotmail, Outlook, Thunderbird). This way, your recipient will already see your newsletter in its full glory as part of the email preview. It is very easy to set up the automatic pre-header message for new subscribers.

The addition of the mailing address to the email address book will additionally lead to a sustainable improvement of deliverability as your newsletter will, in future, be classified as trustworthy and/or "safe" by the email program. This is also very important regarding the new "smart mailboxes" being used by some email providers (such as Outlook.com, Gmail).

Set up a pre-header for your emails

To implement a pre-header into your emails, you first have to select the recipients that are supposed to receive it and, as a second step, adapt the HTML code of the email.

Selection of the recipients

To avoid adding a pre-header to every email, it is recommended to only send it to new subscribers. Recipients that have been receiving your newsletter for some time may already have added the mailing address to their address books or might not want to do this for whatever reason. It would be best to create a filter for the pre-header that only comprises recipients who have, for example, registered for the

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newsletter in the last three to four weeks. The time period should be adapted to the sending frequency of your newsletter. Send on a monthly basis instead of every week – try approximately 60 days.

Adapt the email

The pre-header should only contain a short text, asking the recipient to take action:

```
Please add our mailing address "newsletter@example.com" to your address book!
```

To only show this text to newly registered recipients, you have to create a new field function using the filter, or use a script. Velocity can, for example, be used for many email marketing programs. The Velocity scripting language allows the integration of logics into any HTML code to perform recipient-dependent dynamisations. A general description of the scripting language can be found on the Apache website.

Using a professional email marketing solution, makes it very easy to integrate pre-headers into mailing templates. Depending on how flexibly the pre-header is supposed to be used, fixed filters could be linked or the filter and/or the registration period for the filter could be designed as selectable.

Adapting the text version

You should also add the prompt regarding the adding of the mailing address to the recipient's personal address book to the first line of the respective text version of your newsletter.

Test

Test to see whether your changes actually work. For this purpose, send a test email to an email address, whose opt-in date falls within the relevant time period. To ensure that this is the case, simply create a new email address exclusively for testing purposes.

Header

The header can contain several paragraphs. You can select the same paragraph types as in the content section. The header paragraph exists only once. You can remove it if not needed. By default, the header contains a text/image paragraph with a logo and the issue number. Complete this information and upload your company logo. We recommend not to place too much content in the header.

→ To add a new paragraph in the header, click `New: Header paragraph`. For further configuration of these paragraphs, see Content paragraphs.

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- To define the layout and select other options in the header, click Header. For further information, see Grouping paragraphs.

Footer

The footer usually contains contact and legal information and an imprint. You can add further paragraphs to the footer. The newsletter contains only one footer element. If you do not need it, you can delete the footer.

- To add a new paragraph in the footer, click New: Footer paragraph. For further configuration of these paragraphs, see Content paragraphs.
- To define the layout and select other options in the footer, click Footer. For further information, see Grouping paragraphs.

Grouping paragraphs

At top-level of the newsletter, only pre-header, header, footer and grouping paragraphs appear. The grouping paragraph does not contain any content, since it serves to structure the newsletter. You can add several grouping paragraphs to one mailing. Into these, the actual content paragraphs can be inserted. Each grouping paragraph can contain its own table of contents, or you can set one table of contents for all grouping paragraphs. The grouping paragraph gives you further layout options, for example a sidebar can be used.

- To add a new grouping paragraph, click New: Paragraph and then Grouping paragraph. Configure the grouping paragraph as described below.
- To add content to the grouping paragraph, click New: Content paragraph, click a paragraph type and edit it as described in the Content paragraphs section.
- To add a new separator, click New: Paragraph and then Separator. Configure the separator as described in the Separator paragraph section. Click Apply, to add the separator to the newsletter.

Main area tab

Parameter	Description
Layout...	
Padding	If you do not enter a value here, the margin value from the general settings for the newsletter content will be used. The inner padding is set as an integer value in pixels. You can define a different value for each side. The value 0 is used to set no padding at all. Use the following scheme to set the padding:

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Parameter	Description
	» one value, e. g. "2" sets the same value to all four sides. » two values, e. g. "2 4" sets the top and bottom padding to 2px, the left and right padding to 4px. » four values, e. g. "2 1 0 1" sets the upper padding to 2px, right padding to 1px, no padding at the bottom and the left padding to 1px.
Space between content paragraphs	Specify the space (vertical and horizontal) between content paragraphs within a grouping paragraph.
Border...	
Show	Select this check box to display a frame around the whole content area.
Border width	The border width is set as an integer value in pixels. You can define a different value for each side. The value "0" is used to show no border at all. Use the following scheme to set the border width: » one value, e. g. "2" sets the same value to all four sides. » two values, e. g. "2 4" sets the top and bottom border to 2 pixels, the left and right border to 4 px. » four values, e. g. "2 1 0 1" sets the upper border to 2 pixels, right border to 1 pixels, no border at the bottom and the left border to 1 pixels. Be aware that, if you use rounded corners, only a single border width value can be used. Should there be more than one value, only the first one is used.
Color	The border color must be entered as a hexadecimal value, preceded by the # character. click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Rounded corners	The **Show** check box must be selected for this parameter to be effective. The radius value is the same as the padding value set for this paragraph. If no padding value has been set, a value of 10 pixels is assumed. Be aware that if you select this option, only a single value for border width will be used. Should more than one value for border width be defined, only the first one is assumed for all sides.
Background...	
Color	The background color must be entered as a hexadecimal value, preceded by the # character. Click the green triangle to open a list with default web colors and the

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Parameter	Description
	corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Image	The correct display of background images is not supported by all email clients. The background image should not contain any important information. If you use a background image, the parameters **Alignment** and **Repeat** become effective. Be aware that the background image is only visible at the border areas and at free spaces, being masked by the content and eventual other backgrounds.
Alignment	This parameter is effective only if a background image has been defined and no horizontal repeat has been set.
Repeat	This parameter is effective only if a background image has been uploaded.

Sidebar tab

Optionally, grouping paragraphs can be given a two-column layout with a main area and a sidebar. The sidebar can contain the same content paragraphs as the main area.

Parameter	Description
Layout...	
Show	Select this check box to show a sidebar in this grouping paragraph.
Width	The value cannot be greater that the total width of the content area.
Position	The sidebar may appear to the left or to the right of the main area.
Padding	If you do not enter a value here, the margin value from the general settings for the newsletter content will be used. This padding is only visible, if a background image or a background color different from that of the main area has been defined. You can define a different value for each side. The value "0" is used to set no padding at all. Use the following scheme to set the padding: » one value, e. g. "2" sets the same value to all four sides. » two values, e. g. "2 4" sets the top and bottom padding to 2 pixels, the left and right padding to 4 pixels. » four values, e. g. "2 1 0 1" sets the upper padding to 2 pixels, right padding to 1 pixel, no padding at the bottom and the left padding to 1 pixel.
Space between	Specify the space (vertical and horizontal) between content paragraphs within a grouping paragraph.

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Parameter	Description
content paragraphs	
Space between sidebar and main area	Specify the space between the sidebar and the main area.
Mobile...	
Position	In the mobile version, the sidebar is positioned either above or below the main area, due to the reduced available space. Select the desired position from the drop-down list. The mobile version must be activated in the general settings, otherwise this option will be without effect.
Border...	
Show	Enable this option to display a frame around the sidebar area.
Border width	The border width is set as an integer value in pixels. You can define a different value for each side. The value "0" is used to show no border at all. Use the following scheme to set the border width: » one value, e. g. "2" sets the same value to all four sides. » two values, e. g. "2 4" sets the top and bottom border to 2 pixels, the left and right border to 4 pixels. » four values, e. g. "2 1 0 1" sets the upper border to 2 pixels, right border to 1 pixel, no border at the bottom and the left border to 1 pixel. Be aware that, if you use rounded corners, only a single border width value can be used. Should there be more than one value, only the first one is used.
Color	The border color must be entered as a hexadecimal value, preceded by the # character. click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Rounded corners	The **Show** check box must be selected for this parameter to be effective. The radius value is the same as the padding value set for this paragraph. If no padding value has been set, a value of 10 pixels is assumed. Be aware that if you select this option, only a single value for border width will be used. Should more than one value for border width be defined, only the first one is assumed for all sides.

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Parameter	Description
Background...	
Color	The background color must be entered as a hexadecimal value, preceded by the # character. click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Image	The correct display of background images is not supported by all email clients. The background image should not contain any important information. If you use a background image, the parameters **Alignment** and **Repeat** become effective. Be aware that the background image is only visible at the border areas and at free spaces, being masked by the content and eventual other backgrounds.
Alignment	This parameter is effective only if a background image has been uploaded and the background image is not repeated horizontally.
Repeat	This parameter is effective only if a background image has been uploaded.

Click profiles tab

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See the section Click profiles if you want to create click profiles.

Target groups tab

Parameter	Description
Target groups	If you want this paragraph only to be shown to a certain recipient segment, select one or more target groups here. If more than one target groups are selected, just one must match (OR logic). See the section Target groups if you want to create target groups. For paragraphs in the header and footer you cannot select target groups, since these elements are considered mandatory in every mailing.

Content paragraphs

On the second level, i. e. in the grouping paragraphs of your mailing, you can insert the content paragraphs described in the following and fill them with the desired content. To do this, click

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New: Content paragraph and select the desired type. The following paragraph types are available:

- Product paragraph: Adds a paragraph with pre-defined fields for product details. See also the General settings section.
- Product paragraph with content interface: The product paragraph with content interface imports product data such as offer texts and product images from your webspace or server into the Template Kit.
- Content interface paragraph: This paragraph allows you to add items from your online shop into a mailing.
- Source code paragraph: This type allows you to enter HTML and a separate text version.
- Text or image paragraph: This type contains a text area and an image. The image can be placed relative to the text block and the headline.
- Table of contents paragraph: This type automatically creates a table of contents from the headlines either of the content paragraphs or the grouping paragraph it is placed in or from all content paragraphs in the newsletter. Content paragraphs that have been excluded from the table of contents are ignored.
- Image bar paragraph: This type allows you to create a vertical or horizontal image bar with up to 10 images. The images are scaled down automatically, i.e. the more images you include, the smaller each image will be displayed.
- Separator paragraph: This separator is only for structuring purposes and does not contain any content.
- RSS feed paragraph: This paragraph allows you to automatically load content from an RSS feed directly into your mailing.
- Recommendations paragraph: This type adds automatically generated individual recommendations for each recipient through a URL . You will need a software that generates recommendations based on the recipient's actions .
- Facebook paragraph: This type allows you to integrate current Facebook posts into your message.
- Twitter paragraph: This type allows you to integrate current tweets into your message.

Product paragraph

Use the product paragraph to add items from your online shop into a mailing. The paragraph contains input fields for:

- Product name
- Description
- Category
- Old price
- Current price
- Manufacturer

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The order of the fields can be defined in the general settings. You can use your own categories instead of the standard categories. In this case, speak with our customer support team before setting up the template. The product paragraph fields do not have any formatting by default. Use the editor for formatting if you want to manually edit the paragraph or – when using a content interface – HTML, which can be transferred together with the contents.

Content interface

The product paragraph has been prepared for the use of the Content interface, which you can use to automatically fill in the content fields, e.g. with product data from your goods management system. Ask customer support for more information.

Integrate a product paragraph in a mailing

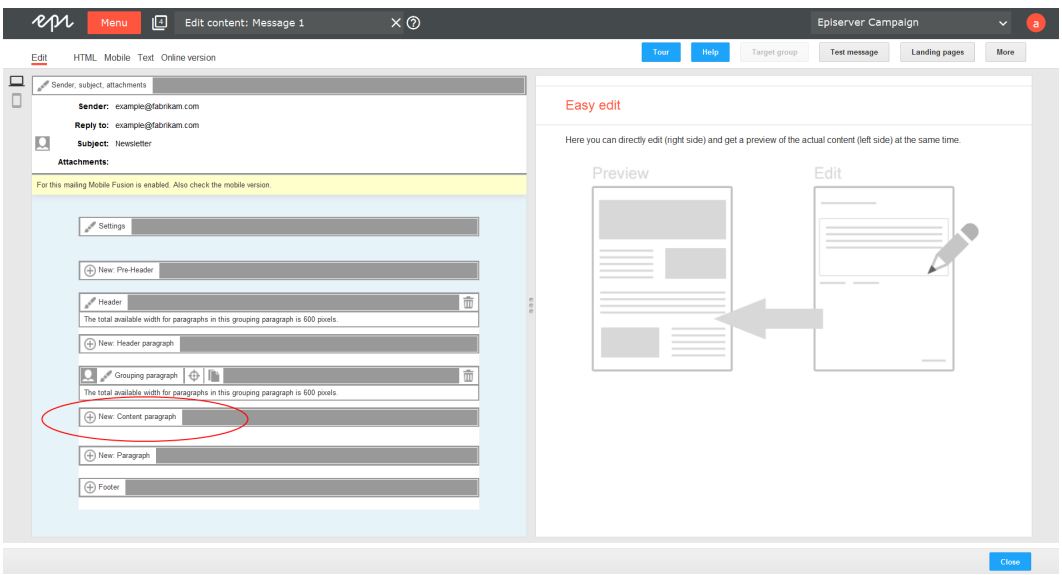
A product paragraph is integrated in a mailing in 2 steps:

1. Create a new content paragraph of the **Product** type.
2. Configure the product paragraph.

Create a product paragraph

To create a new content paragraph of the **Product** type, perform the following steps:

1. While editing the content of a mailing in the Template Kit, click New: Content paragraph.



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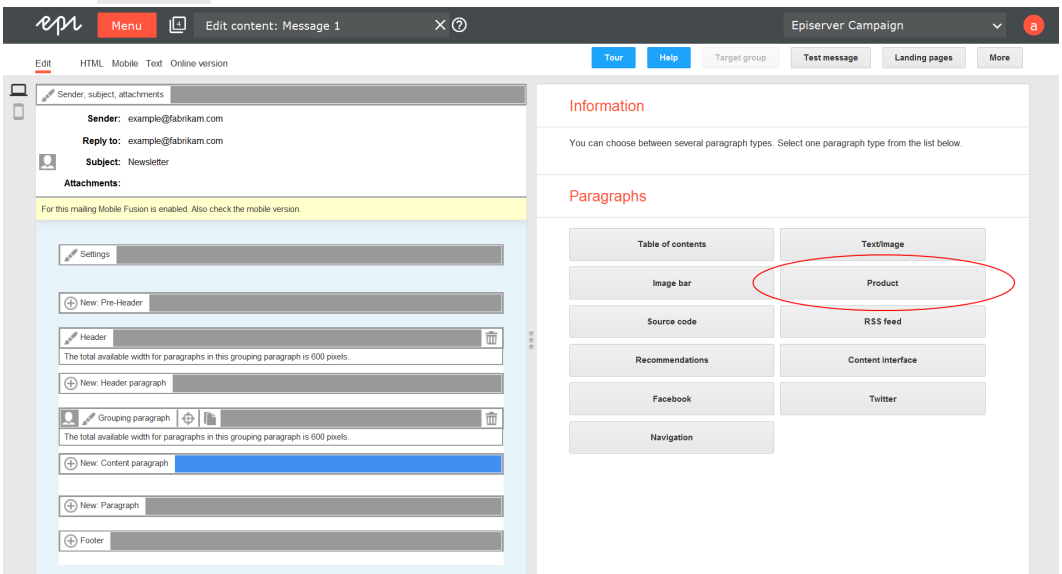
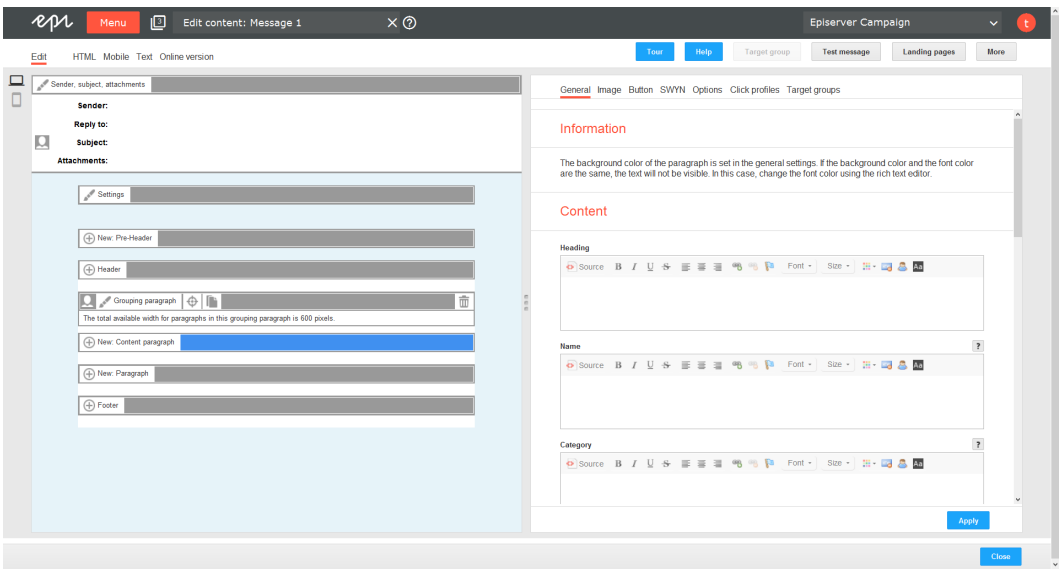
You can also use the paragraph in the header and footer area. To create the paragraph in the header area, click **New: Header paragraph**. To create the paragraph in the footer area, click **New: Footer paragraph**.

✔ A window for selecting the paragraph type opens on the right-hand side.

→ 2. Click **Product**.



✔ The configuration window for the selected paragraph type opens.



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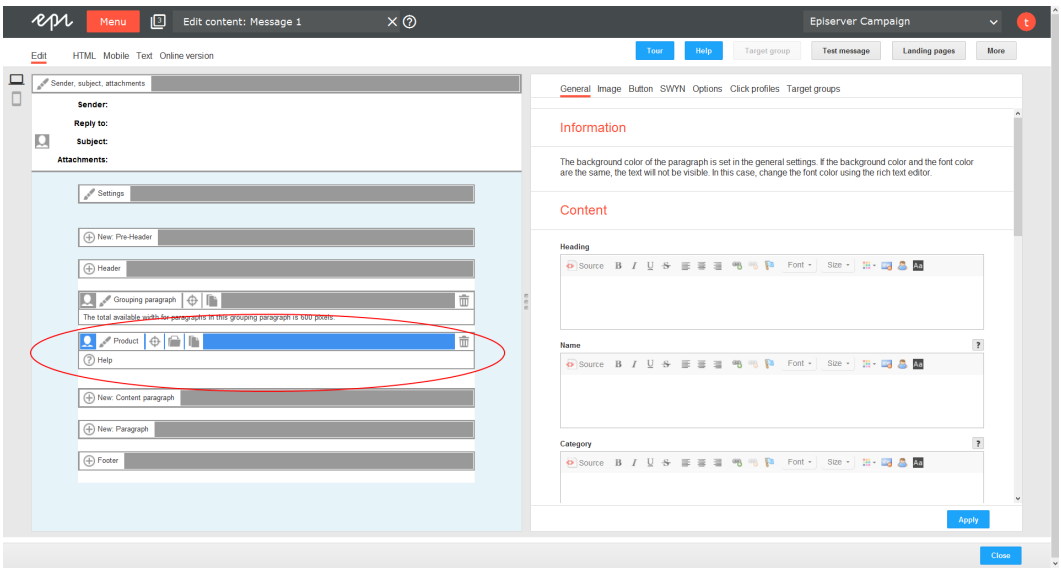
→ 3. Click Apply.

✔ This creates a new **Product** type content paragraph. The newly created product paragraph appears on the left side in the preview window.



Configure a product paragraph

To configure a product paragraph, perform the following steps:

→ 1. On the left-hand side, in the menu bar of the product paragraph, click Product.

✔ The configuration window opens on the right-hand side.

→ 2. For the setting options, see the following tables in the individual tabs. Change the settings as desired and confirm your entries by clicking Apply.

- General tab
- Image tab
- Button tab
- SWYN tab
- Options tab
- Click profiles tab
- Target groups tab

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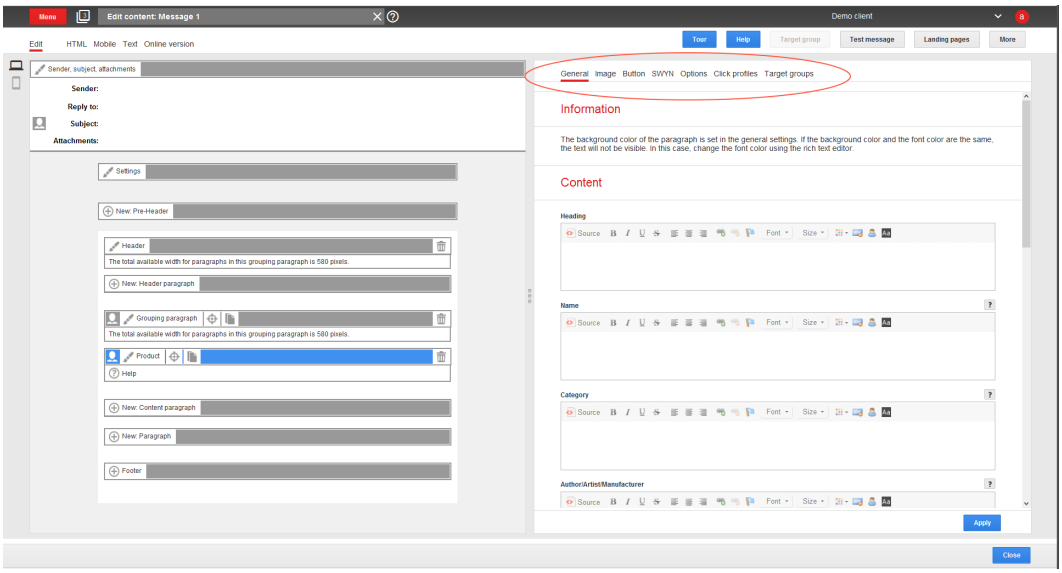

✔ You have successfully configured the product paragraph.

General tab

Parameter	Description
Content...	
Heading	Enter a heading for this paragraph.
Name	Enter a product title or a work title.
Category	Enter a product category or a genre.
Author/Artist/Manufacturer	Enter the name of the author, the artist or the manufacturer.
Text	This field should contain a product description or an abstract of a work.
Old price	If you want to create a promotional campaign, a bargain or a special offer, enter the old price here.
Current price	Enter the current price of the product.
Show in desktop version	Select this check box to include this paragraph in the desktop version of the mailing.
Show in mobile version	Select this check box to include this paragraph in the mobile version of the mailing. The setting **Activate mobile version** in the general settings must be activated for this option to take effect. If you disabled the mobile version , this option has no function.

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Parameter	Description
Show in text version	Select this check box to include this paragraph in the text version of the mailing.
Link...	
Text	Text entered here is linked to the URL below.
URL	This could be a landing page or the product details page from your online shop.
Alignment	The link can be placed to the right, to the left or centered.

Image tab

Parameter	Description
Image	Upload an image from your computer or enter an image URL in the field **Alternatively external URL** that points to the image file.
Alternative text	This text is displayed, if a recipient has blocked or disabled the display of images in the email client, or if the image cannot be displayed for any other reason. We strongly recommend that you always enter an alternative text that may contain a short image description or title.
Link	You can link the image to a landing page or a page from your website. If you have entered a text link in this paragraph, we recommend that you use the same link for the image.
Subtitle	Enter an optional image subtitle here.
Position	You can place the image in a separate column next to heading and text block, or in a separate column next to the text block but below the heading. These positions are recommendable in most cases. If you use large images that run over the whole width of a paragraph or area, place them centered below the heading, below the text or below the link.

Button tab

More information on this topic can be found in the documentation for the Click2Go function.

SWYN tab

You can enable the share function for social networks individually for each paragraph. Configure the SWYN function in this tab.

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Parameter	Description
General...	
Alignment	By default, links (icons and texts) as well as the introduction text are right aligned. The introduction text will only be output, if there is enough space in the respective paragraph.
Position	By default, links (icons and texts) as well as the introduction text are placed at the bottom of the paragraph.
Default values...	
Title	By default, this title is shown in the profile of a social network, if a recipient shares this paragraph and if no other title has been defined for the specific network. The maximum length is 50 characters.
Text	By default, this text is shown in the profile of a social network, if a recipient shares this paragraph and if no other text has been defined for the specific network. The maximum length is 250 characters.
Image	By default, this image is shown in the profile of a social network, if a recipient shares this paragraph and if no other image has been defined for the specific network. The maximum image size is 100 x 100 pixels. Larger images are scaled down to this size.
Facebook...	
Show	Select this check box in order to enable sharing of this paragraph via Facebook for your recipients.
Title	This title is shown if a recipient shares the paragraph in his/her Facebook profile. If you do not enter a title here, the paragraph heading from the **General** tab is used. The maximum text length is 50 characters.
Text	This text is shown if a recipient shares the paragraph in his/her Facebook profile. If you do not enter a text here, the paragraph text from the **General** tab is used. The maximum text length is 250 characters.
Image	This image is shown next to the text if a recipient shares the paragraph in his/her Facebook profile. If you do not enter a text here, the image uploaded in the **Image** tab is used. The maximum size is 100 x 100 pixels. Larger images are scaled down automatically to this size.
Redirect	By default, a landing page with the content from this paragraph is created automatically and all posts in Facebook are linked to this landing page. If you select the **Redirect**

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Parameter	Description
	check box, the posts is linked to the URL entered in the **General** tab.
Twitter...	
Show	Select this check box in order to enable sharing of this paragraph via Twitter for your recipients.
Title	This title is shown if a recipient shares the paragraph in his/her Twitter profile. If you do not enter a title here, the paragraph heading from the **General** tab is used. The maximum text length is 50 characters.
Redirect	By default, a landing page with the content from this paragraph is created automatically and all tweets are linked to this landing page. If you select the **Redirect** check box, the posts are linked to the URL entered in the **General** tab.
MySpace...	
Parameters for MySpace are identical with those for Facebook.	
Xing...	
Parameters for Xing are identical with those for Twitter.	

Options tab

You can define an individual layout, different from the general newsletter layout, for each content paragraph. All available layout options can be found in this tab.

Parameter	Description
Layout...	
Width	By default, the maximum available width is used. This value depends on the padding and the usage and width of the sidebar. Enter an integer value in pixels. If this value exceeds the maximum available width, it is ignored.
Height	By default, this paragraph is displayed with the maximum available height, taken into account the content of the paragraph. Alternatively, you may set a fixed value for the height. Should the content of the paragraph exceed this height, the value is ignored and the content displayed properly with the necessary height.
Background color	The background color must be entered as a hexadecimal value, preceded by the # character. Click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The

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Parameter	Description
	display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Padding	You can define a different value for each side. The value "0" is used to set no padding at all. Use the following scheme to set the padding: » one value, e. g. "2" sets the same value to all four sides. » two values, e. g. "2 4" sets the top and bottom padding to 2 pixels, the left and right padding to 4 pixels. » four values, e. g. "2 1 0 1" sets the upper padding to 2 pixels, right padding to 1 pixel, no padding at the bottom and the left padding to 1 pixel.
Border...	
Show	Select this check box, if you want to display a frame around the whole paragraph.
Border width	The border width is set as an integer value in pixels. You can define a different value for each side. The value "0" is used to show no border at all. Use the following scheme to set the border width: » one value, e. g. "2" sets the same value to all four sides. » two values, e. g. "2 4" sets the top and bottom border to 2 pixels, the left and right border to 4 pixels. » four values, e. g. "2 1 0 1" sets the upper border to 2 pixels, right border to 1 pixel, no border at the bottom and the left border to 1 pixel.
Color	The border color must be entered as a hexadecimal value, preceded by the # character. Click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Mobile...	
Width	Set the width (in percent) of the paragraph in the mobile version here. By default, the width is set to 100%. Be aware that you must set the width of two consecutive paragraphs, so that the width of both adds to 100%. Otherwise, these paragraphs are displayed one below the other in the mobile version, each with the respective width.
Table of contents...	
Show in	By default, all content paragraphs create an automatic entry in the table of contents

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Parameter	Description
Table of Contents	paragraph. If you do not want this paragraph to appear in the table of contents, clear this check box.
Alternative Table of Contents Entry	If you want this paragraph to appear in the table of contents, but with a different entry (by default, the paragraph heading is shown in the table of contents), enter the text that should appear here.

Click profiles tab

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. Refer to the Click profiles section if you want to create click profiles.

Target groups tab

Parameter	Description
Target groups	If you want the paragraph only to be shown to a certain recipient segment, select one or more target groups here. If more than one target groups are selected, just one must match (OR logic). Refer to the Target groups section if you want to create target groups.

Product paragraph with content interface

The product paragraph with content interface imports product data such as offer texts and product images from your webspace or server into the Episerver Template Kit. This allows you to recommend current products to your recipients, offer discounts, provide notifications of new releases, and much more.

The advantage of this additional feature for the product paragraph: The extension through the content interface allows you to create your product offers in your usual merchandise management system and then transfer these into the Episerver Template Kit. In addition, the extension makes the problem of synchronizing changes to your offers child's play. Normally, you need to add product data to your newsletters manually, but this is not necessary when using the extension. Simply create a new product paragraph and import your prepared product offers with just a few mouse clicks.

The solution was technically implemented using the open XML standard. You can store your product data either statically as XML files on your server, or your server can dynamically generate XML files when requested by the content interface. Episerver Campaign retrieves your product data and makes it available to you for your messages.

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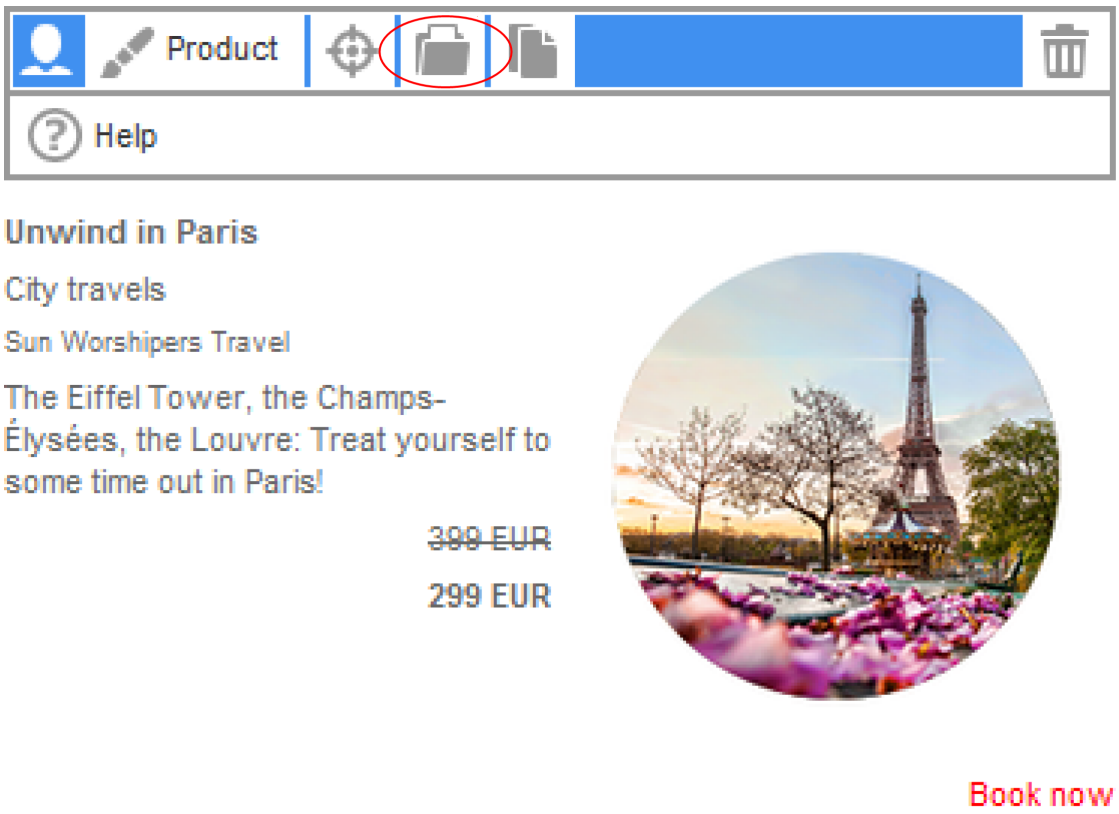
Configuring the content interface

➜ In order to set up the content interface for your product paragraphs, contact Episerver customer support, who will gladly activate this feature for you.

In order to enable the feature, Episerver customer support requires you to specify the directory on your webspace or on your server where you will store your product data. Note: The directory containing your product data must allow HTTP requests. If the directory containing your product data is only accessible with authentication, disable the authentication. If you so wish, access to your product data can be limited to specific IP addresses. For more information, contact Episerver customer support.

✔ When the feature has been enabled for you, a new button with the icon will be available to you in the menu bar of the product paragraph.



On the following pages, you can read instructions on how to prepare your product offer as an XML file for import into the Template Kit. You will also find information on how you can customize the layout of your

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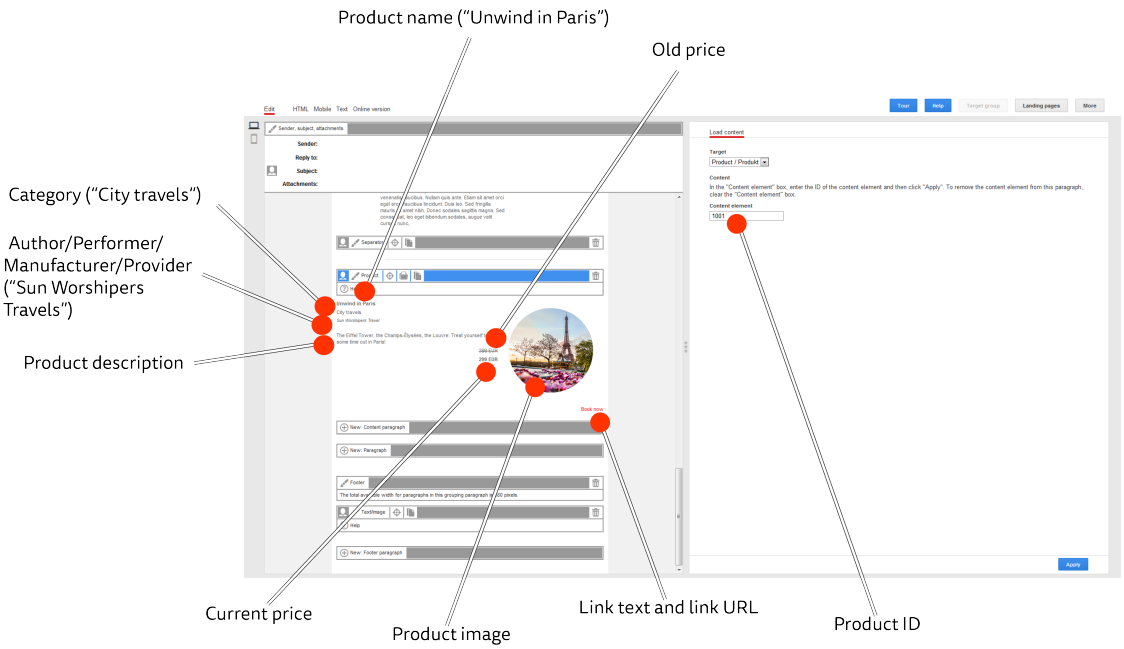
product offer in your messages. If you encounter any problems, refer to the troubleshooting section of this chapter.

Default values

The product paragraph can load the following product data through the content interface:

- unique product ID
- product name
- category to which the product belongs
- authors/performers/manufacturers/providers of the product
- product description
- old price
- current price
- a URL link that leads to the product, such as in your web shop, for example
- a text label for the URL link, for example, "Book now"
- an image URL so that you can display an image of the product in your message

The following graphic gives an overview of the individual components that your product offer can have when using product paragraphs with the content interface.



Make your product data available as XML

In order to feed your product data via the content interface into Episerver Campaign, your webspace or server must make your product data available in XML format. XML is an open international standard that

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enables the transmission of data over the Internet in a structured form.

If you want to load your product data from your webspace or server into the Template Kit and start the import into Episerver Campaign, your product data will be requested from your webspace or server via a so-called HTTP request. When this request is made, your product data must:

1. already exist on your webspace or server as an XML file (static product data)
2. or the HTTP request will trigger the generation of the product data on your server in XML format and return these in the reply (dynamic product data).

Which variant you choose depends on the system environment that is used by your company. Contact your system administrator to find out which technical implementation is in use.

1. Save static product data on the server

If you would like to save your product data statically as XML files on your webspace or server, you need to save each product in its own XML file. It is not possible to group multiple products into a single XML file. In order to save a product as an XML file, perform the following steps:

→ 1. Open a text editor such as Notepad (Windows) or Textedit (macOS/OS X).

To create a product offer in XML format, no special software is necessary. A simple text editor is sufficient.

→ 2. Create a new document in the text editor.

Make sure that you have the correct character encoding (UTF-8) in your text document. If your text document is not automatically set to UTF-8, change the character encoding as necessary. If you create the text document with another character encoding, the text may not be represented properly.

→ 3. Copy the following code into your text document:

```
<element>
<property name="id"><![CDATA[12345]]></property>
<property name="name"><![CDATA[Name]]></property>
<property name="category"><![CDATA[Category]]></property>
```

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```
<property name="manufacturer"><![CDATA
[Author/Artist/Manufacturer]]></property>

<property name="text"><![CDATA[Product description]]></property>

<property name="oldPrice"><![CDATA[<s>EUR 29.99</s>]]></property>

<property name="currentPrice"><![CDATA[<b>EUR 19.99
EUR</b>]]></property>

<property name="linkText"><![CDATA[Add to shopping cart]]></property>

<property name="linkUrl"><![CDATA
[http://www.example.com/product/123456]]></property>

<property name="imageUrl"><![CDATA
[http://img.example.com/product/123456.jpg]]></property>

</element>
```

The following steps guide you through the code. However, only the product ID (in the code, the property **id**) and the product name (in the code, the property **name**) are mandatory. All other values are optional. If you do not need certain values, skip the respective step and delete the corresponding line of code in your text document.

Example: If you do not want to specify the product manufacturer, delete the following line:

```
<property name="manufacturer"><![CDATA
[Author/Artist/Manufacturer]]></property>
```

Alternatively, you can also leave the unneeded lines of code empty if, for example, you would like to enter the information at a later point in time. For example, if you do not want to specify the product manufacturer and leave the line of code blank, the line of code will look like this:

```
<property name="manufacturer"><![CDATA[]]></property>
```

If you are familiar with HTML, you can use HTML source code in the following properties: **name**, **category**, **manufacturer**, **text**, **oldPrice**, **currentPrice**. Example applications: You want to insert links into the product description.

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4. Enter the product ID in the first property line. The numerical string "123456" is used as a placeholder. You must insert your product ID right between the square brackets after "CDATA".

Example: Your product has the product ID "ParisTrip01". The product ID inserted into the code will then appear as follows:

```
<property name="id"><![CDATA[ParisTrip01]]></property>
```

Use only alphanumeric characters (letters and numbers) in your product ID. You may encounter problems importing your product data later if you use special characters.

5. Enter the product name in the second property line. The word "Name" is entered as a placeholder. The name of your product must be inserted between the square brackets after "CDATA".

Example: Your product has the name "Unwind in Paris". The product name inserted into the code will then appear as follows:

```
<property name="name"><![CDATA[Unwind in Paris]]></property>
```

6. Enter the product category in the third property line. The word "Category" is entered as a placeholder. The category of your product must be inserted between the square brackets after "CDATA".

Example: Your product belongs to the category "City travels". The product category inserted into the code will then appear as follows:

```
<property name="category"><![CDATA[City travels]]></property>
```

7. Enter the manufacturer of your product (or, depending on the product, the author, artist, operator, manufacturer, etc.) in the fourth property line. The words "Author/Artist/Manufacturer" are entered as a placeholder. The manufacturer of your product must be inserted between the square brackets after "CDATA".

Example: Your product is offered by the operator "Sun Worshipers Travel". The operator inserted into the code will then appear as follows:

```
<property name="manufacturer"><![CDATA[Sun Worshipers
Travel]]></property>
```

8. Enter the description of your product in the fifth property line. The words "Product description" are entered as a placeholder. Here you can enter text and a link to a website with further information about your product. You must enter the description and the link between the square brackets after "CDATA".

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Example: Your product description is: "Eiffel Tower, Champs-Élysées, Louvre: Treat yourself to some time out in Paris!" The description inserted into the code will then appear as follows:

```
<property name="text"><![CDATA[Eiffel Tower, Champs-Élysées, Louvre:
Treat yourself to some time out in Paris!"]]></property>
```

9. Enter the old price for your product in the sixth property line. The value "EUR 29.99" is entered as a placeholder. You must enter the old price of your product between the pointed brackets with the small "s".

Example: The old price for your product was "EUR 399". The old price inserted into the code will then appear as follows:

```
<property name="oldPrice"><![CDATA[<s>EUR 399</s>]]></property>
```

The old price will be crossed-out by default. If you do not want to show the old price any more in your communications, delete <s> and </s> from the line of code. In our example, the line of code for the old price of EUR 399 that is not crossed-out looks as follows: `<property name="oldPrice"><![CDATA [EUR 399]]></property>`

10. Enter the current price for your product in the sixth property line. The value "EUR 19.99" is entered as a placeholder. You must enter the current price of your product between the pointed brackets with the small "b".

Example: The current price for your product is "EUR 299". The current price inserted into the code will then appear as follows:

```
<property name="currentPrice"><![CDATA[<b>EUR 299</b>]]></property>
```

By default, the current price is displayed in bold. If you do not want to show the current price in bold anymore in your communications, delete "" and "" from the line of code. In our example, the line of code for the current price of EUR 299 in normal, non-bold font looks as follows: `<property name="currentPrice"><![CDATA[EUR 299]]></property>`

11. Enter a text label for the link to your product in the eighth property line. The words "Add to shopping cart" are entered as a placeholder. The text label for the link to your product must be inserted between the square brackets after "CDATA".

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Example: The text for the link to your product reads: "Book now". The text entered into the code for the link to your product looks as follows:

```
<property name="linkText"><![CDATA[Book now]]></property>
```

12. Enter the URL link to your product in the ninth property line. The URL "http://www.example.com/product/123456" is entered as a placeholder. The URL link to your product must be inserted between the square brackets after "CDATA".

Example: The link URL to your product is "http://www.sonnenhungrig.com/paris". The URL link inserted into the code will then appear as follows:

```
<property name="linkUrl"><![CDATA
[http://www.sonnenhungrig.com/paris]]></property>
```

13. Enter the URL to your product image in the tenth property line. The URL "http://img.example.com/product/123456.jpg" is entered as a placeholder. The URL to your product image must be inserted between the square brackets after "CDATA".

Example: The URL to your product image is: "http://www.sonnenhungrig.com/eiffeltower.jpg". The URL to your product image inserted into the code will then appear as follows:

```
<property name="imageUrl"><![CDATA
[http://www.sonnenhungrig.com/eiffeltower.jpg]]></property>
```

14. Once you have completed all entries, save your text document. Use the product ID (the value that you have inserted into the code for the "id" property line) for the file name.

You must save the text document with the file type .xml. In many text editors, select the **Save as** option and then select the corresponding file type from the list.

15. After saving, delete the file extension for your text document. If, for example, your text document is named "ParisTrip01.xml", remove the file extension ".xml" to rename the file as "ParisTrip01".

Do not forget to remove the file extension. If you do not remove the file extension, your product data will not be able to be loaded using the content interface.

16. Save the text document in your webspace or on your server in the directory that you communicated for the setup of the product paragraph with content interface.

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Never change the location where your product description text documents are saved without consulting the Episerver customer support team. If (for example) you have given the URL "http://www.example.com/products" as the location, you must always save your product data text documents in this directory. If you save your text documents in another directory without consulting the Episerver customer support team (for example, "http://www.example.com/products/specialoffers"), it will no longer be possible to load your product data using the content interface.

✔ Once you have successfully saved your text document in your webspace or on your server, you can access your product offer in the Template Kit. Follow the individual steps in the Load and edit product data section to upload your product offer into the Template Kit using the content interface.

2. Generating dynamic product data on the server

The preparation of dynamic product data generally follows the same steps that are used to prepare static product data. The difference is: The XML files are not prepared manually, but are loaded from a data base when requested (by HTTP request) via the content interface and automatically generated as XML. You need to program code at your company in order to implement this feature. Consult with your system administrator if you would like to generate dynamic product data instead of having to prepare product offers manually.

Load and edit product data

Once your product data have been made available as XML files in your webspace or on your server, and our customer support service has stored your data source in your client, you can load your product data into the Template Kit and after the import is complete you can edit them as needed directly in the Template Kit using the content interface.

Load product data

In order to load your product data from your webspace or your server into the Template Kit, perform the following steps:

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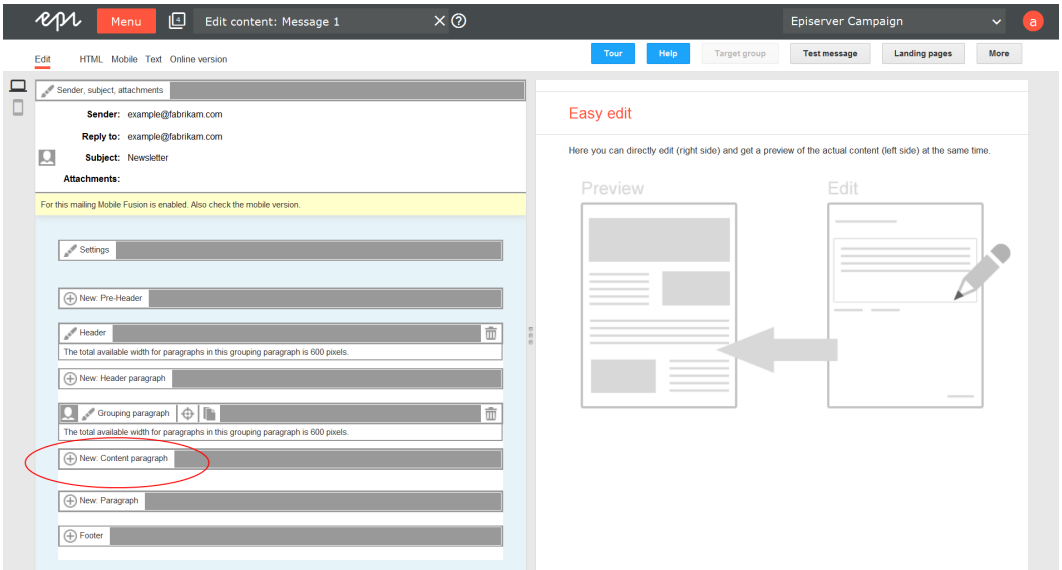
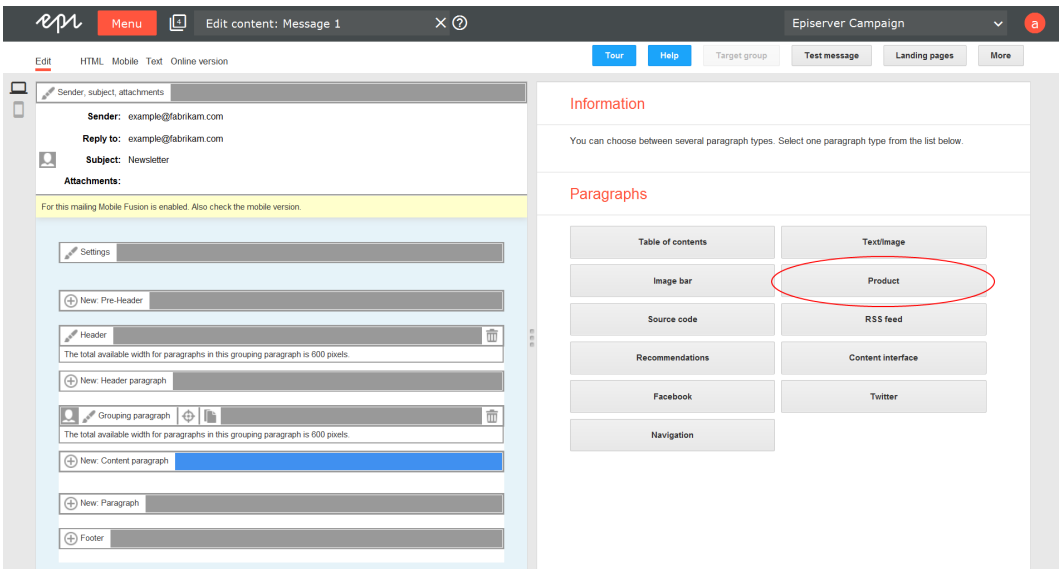
1. In the Template Kit, click New: Content paragraph.



2. Click Product.



✔ The configuration window for the selected paragraph type opens.

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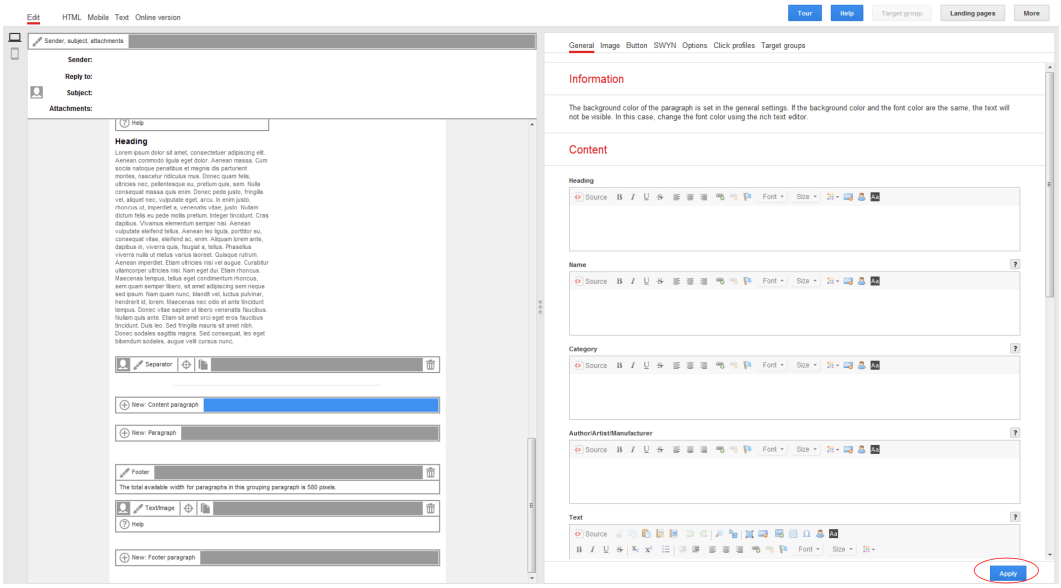
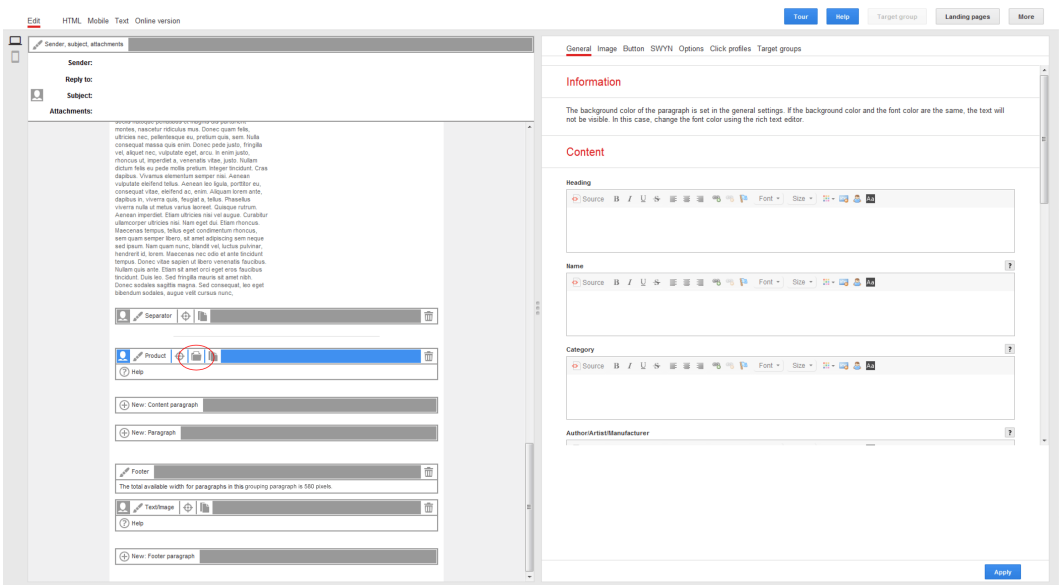
3. Do not change any settings in the configuration window yet. Click **Apply**.



You have created a new content paragraph of type "Product", which from now on will be referred to as the "product paragraph". The newly created product paragraph appears on the left side in the preview window.

4. In the menu bar of the newly created product paragraph, click the content interface icon: .



5. In the **Content element** box, enter the ID of the product offer that you would like to load into the Template Kit.

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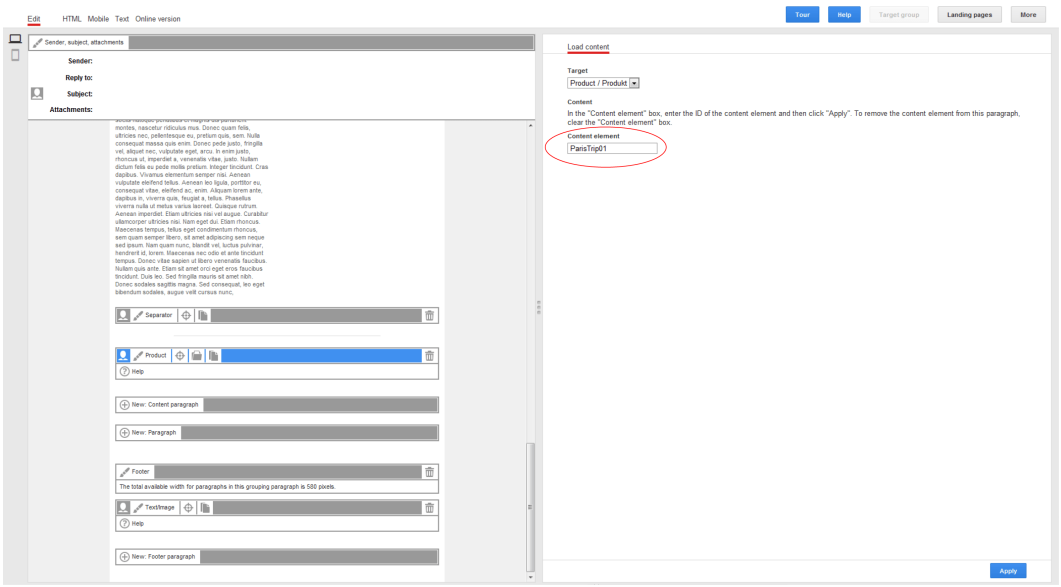

→ 6. On the bottom right of the window, click Apply.

✔ Your product data is loaded via the content interface from your webspace or your server into the Template Kit. Once the import is completed, the product offer appears on the left side of the preview window.

If you would like to load additional product offers into the Template Kit, repeat steps 1–6.

Edit product data

If your product offers were loaded from your webspace or server via the content interface into the Template Kit, you can edit your product offers as needed directly in the Template Kit. The individual steps for this are the same as the ones for processing the product paragraphs without the need for an extension through the content interface. You can find more information about how to edit product paragraphs here: Product paragraph.

If you are using product paragraphs with an extension through the content interface, we recommend that you make changes to the product offers in your system and update the product paragraphs in the Template Kit by loading the changes. This ensures that your product offers are up to date and that no outdated, modified content in your system is loaded into the Template Kit at a later point. To update an existing product paragraph,

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click **Load content** in the menu bar of the product paragraph and then click Apply.

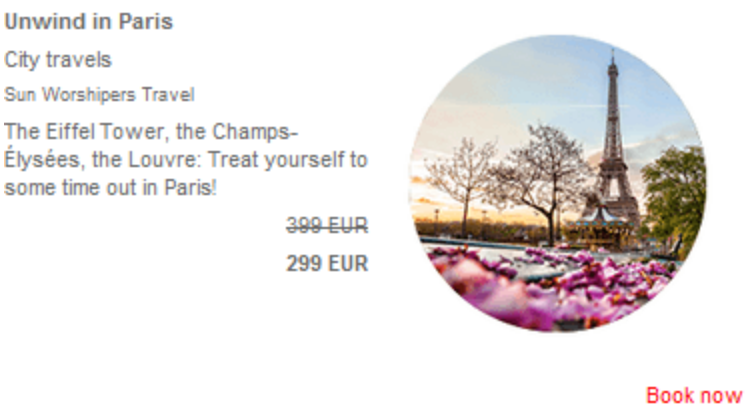
The product paragraph with the content interface can be configured by the Episerver customer support team so that your product offers are automatically updated on the ship date. This option is useful, for example, if your products currently have daily prices, and prices are changed regularly between the time of message creation and shipping. If this option has been configured for you, any changes to your product offers must be made on your system. If you only perform changes in the Template Kit, these will be automatically overwritten on the shipping date with the old content from your webspace or server.

HTML layouts

The product paragraph with the content interface provides you with a layout (hereinafter referred to as the "standard layout") for formatting your offer text and images. It is suitable for various products and services. If you wish, an alternative custom layout can be set up for you.

→ In order to receive an alternative layout customized to your products and services, contact the Episerver customer support team, who will gladly setup an alternative layout for you.

Example of standard layout



Example of an alternative layout

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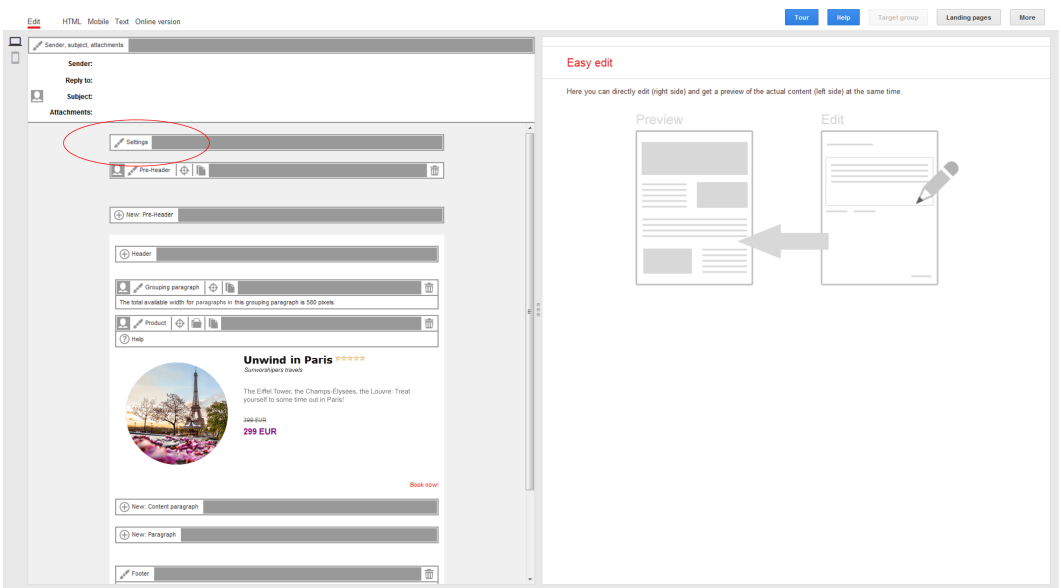
Select and edit layouts

Standard layout

If you like, you can change the order of the individual components of your product offer using the standard layout. You can, for example, determine whether the current price should be shown first followed by the old one, or whether the manufacturer of the product should be displayed before the product category, etc.

To change the order of the individual components of your product offer using the standard layout, perform the following steps:

1. In the Template Kit, click Settings .



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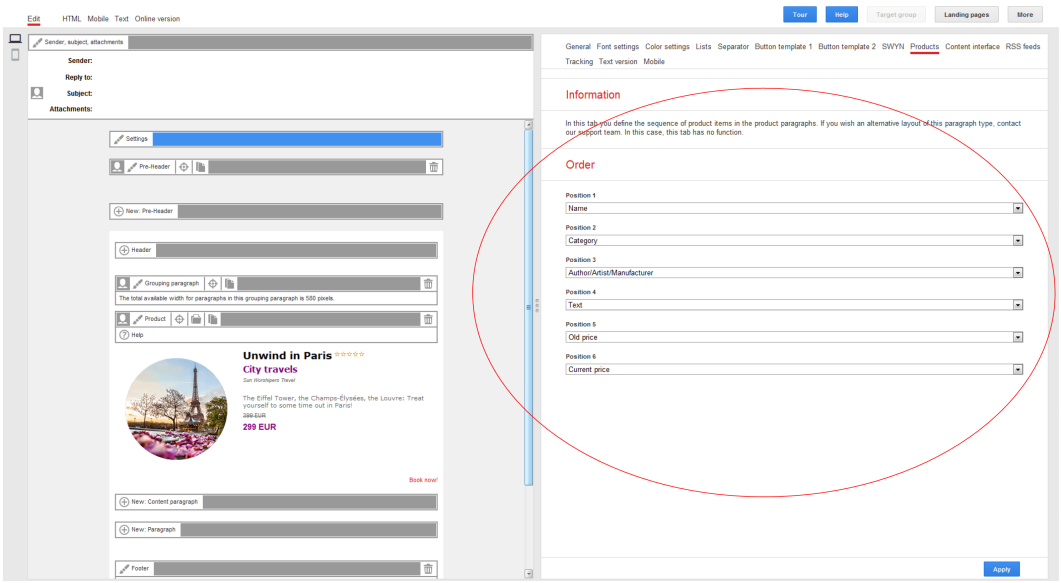
✔ The settings window opens on the right-hand side.

→ 2. Click the **Products** tab.

→ 3. The **Order** area allows you to determine the order of the components of your product offer by making a corresponding selection from the individual drop-down lists.



Alternative Layout

If Episerver customer support has set up an alternative layout for you, your product offers will automatically be formatted according to the specifications of your alternative layout. You do not need to make any further adjustments to the settings.

If an alternative layout has been set up for you, then you will no longer be able to access the standard layout. The alternative layout does not allow you to change the order of individual pieces of content in the Template Kit.

→ If you would like to change your existing alternative layout, contact the Episerver customer support team.

Troubleshooting product paragraph with content interface

The following table lists the most common sources of errors that can arise when working with the product paragraphs and the content interface.

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➜ If you encounter a problem, check this table to see if a solution has been provided that resolves your issue.

If the problem continues after you have attempted the suggested solution, contact Episerver customer support.

Problem	Possible cause	Solution
Product data is not loading	The product ID was entered incorrectly.	Enter the correct product ID.
Product data is not loading	The saved XML file has a file extension.	Remove the file extension.
Product data is not loading	The corresponding product offer no longer exists on your webspace or server.	Save the product offer again on your webspace or server.
Product data is not loading	The product data was saved in the wrong directory on the server or webspace.	Transfer the product data you are trying to load into the directory that you indicated when setting up the content interface.
Product data is not loading	The directory in which the product data is stored is not available.	» Check whether the directory is only reachable after prior authentication and disable authentication. » Check whether there is a problem with your server or webspace and try loading the product data again at a later point.
Some content is not loading. For example, the product image is missing.	Error in the XML code you generated	Correct the XML code.
The special characters are not displayed correctly, e.g., the German umlauts are displayed incorrectly.	Incorrect character encoding in your XML	Set the encoding of your XML file to UTF-8.

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Content interface paragraph

The content interface paragraph imports product data such as offer texts and product images from your e-commerce system into the Template Kit. Whether Shopware, Magento, OXID or an in-house software development by your company or any other system: The content interface paragraph is flexible and supports a variety of data sources. The reason: The technical implementation supports the open XML standard and CSV file format (Comma-separated values) – many data sources support both formats.

Simply export the product data from your data source and let Episerver Campaign process it. In the Template Kit, create a new content interface paragraph with individual items and import your current product offering with just a few mouse clicks.

Your data source can handle your product data either by:

- saving it as static XML files on your webspace or server
- your server generating dynamic XML files when queried
- saving your product data as a CSV file on the server (both manually or automatically)

Episerver Campaign imports your product data as you choose and makes them available to you for your messages.

If desired, both file formats can be used together. For more details, contact our customer support team.

The content interface paragraph is related to the product paragraph with a content interface. However, it differs in that it has more flexibility and supports both CSV and XML formats. Consult the Episerver customer support team to find out which solution is best suited for you.

Static and dynamic content

The content interface paragraph supports both static and dynamic content:

- When using static content, your product data is loaded into the Template Kit when you create the mailing and can then be directly edited as required. If you integrate static content, all recipients will receive the same content.
- When using dynamic content, the content is loaded from the product data source only at the point in time when the message is being sent and cannot be edited in advance with the Template Kit. However, unlike static content, dynamic content allows you to send different product recommendations to each of your recipients. You can find further information about dynamic content in the a) Use a recipient list as a mapping reference section.

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Static content can be used together with dynamic content in the same mailing. The Episerver customer support team will be happy to advise you further on combining both content types.

Four paragraph types

A total of 4 paragraph types are available to you depending on which file format (XML and/or CSV) and which content type (static and/or dynamic) you choose to use.

No.	File format	Content type	Available paragraph
1	CSV	static	Static CSV article
2	CSV	dynamic	Dynamic CSV article
3	XML	static	Static XML article
4	XML	dynamic	Dynamic XML article

Of the 4 paragraph types available, only those paragraph types that have been enabled within your client will be shown in the Template Kit.

Set up the content interface paragraph

→ To set up the content interface paragraph, contact the customer support team who will be happy to enable this feature for your.

→ To do so, provide us with the following information:

- XML or CSV or XML and CSV together: What format would you like to use for your product data?
- If you choose XML: Which directory on your webspace or server will you use to store your product data?

The directory containing your product data must allow HTTP requests. If the directory containing your product data is only accessible with authentication, disable the authentication. If you want, access to your product data can be limited to specific IP addresses. For more information, contact customer support.

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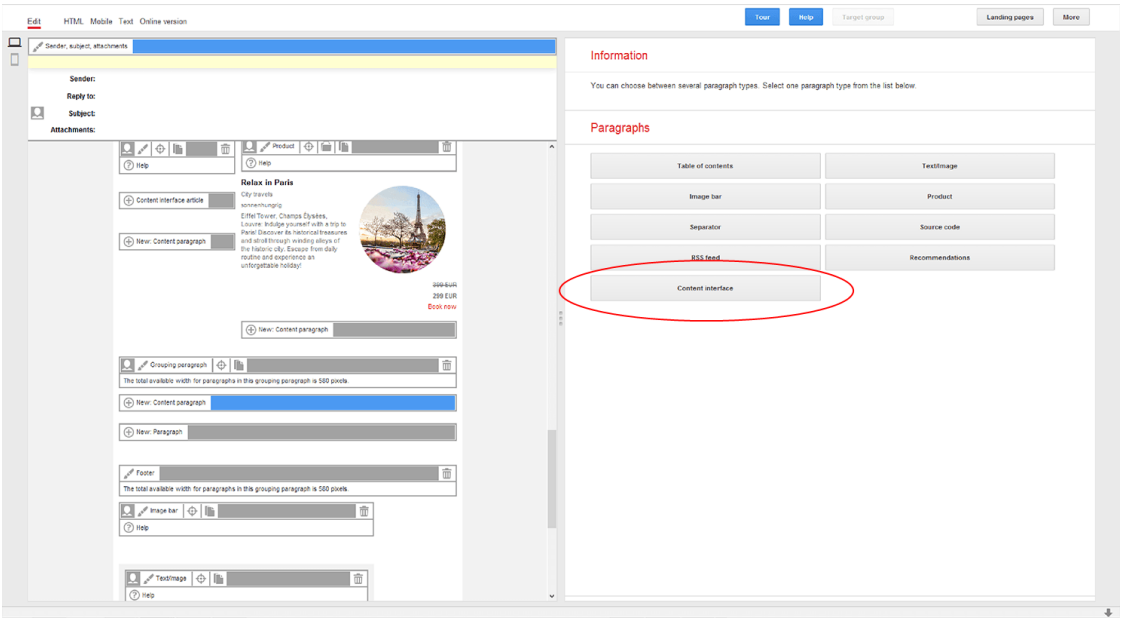
- If you choose CSV: What do you want to call the CSV file you will use to save your product catalog?

  If you update your product catalog at a later time, you must always save the CSV with the updated product catalog under the same name that you gave when setting up the content interface.

- Static content, dynamic content or a combination of both content types: Would you like to send the same content or customized product recommendations to your recipients?

✔ If the feature has been enabled for you, the content interface paragraph type will be available to you in the Template Kit.



On the following pages, you can read instructions on how to prepare your product offering as an XML or CSV file for import into the Template Kit. You will also find information on how you can customize the layout of your product offering in your messages. If you have any difficulties, see the Troubleshooting CSV and XML section of this chapter.

Standard values of a product offer

The content interface paragraph can load the following product data:

- the product's unique ID (will not be displayed in the message later)
- up to 10 text elements per product offer, in which, for example, you can enter the heading for a product offer, the product description or the product price

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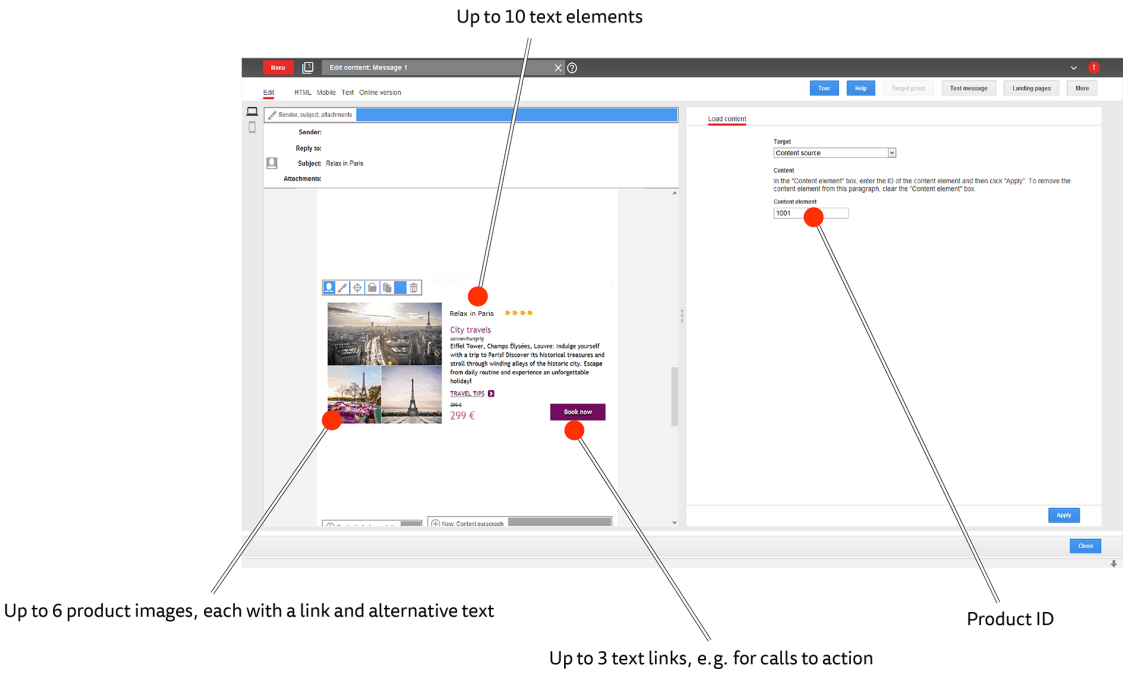
- up to 3 text links per product offer, for example for calls to action such as "Buy now", "Learn more" etc.
- up to 6 product images per product offer (by entering a URL)
- up to 6 links to your product images (one link per image) that direct the recipient to further information by clicking on the image
- up to 6 alternative texts for your product images in case your product images cannot be loaded by the recipient and for support of accessible messages.

The following graphic gives an overview of the individual components that your product offer can have when using the content interface paragraph.



Additional data

You can also transfer up to 20 additional datasets that you can use, for example, as metadata for HTML layout program logic.

Use CSV

If you have selected CSV format, your product data is prepared in two steps:

1. Export your product data from your e-commerce system or from some other data source into a CSV file.
2. Move the CSV file to your personal directory on the server. Episerver Campaign retrieves the CSV file from there and makes the product data it contains available to you in the Template Kit.

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If you have a personal directory on the server but no login information, contact the Episerver customer support team, who will be happy to set up a user account for you.

Below, you can learn more about the details of both steps.

1. Export product data

In the first step, you need to export your product data from your system as a CSV file.

CSV files exported from different systems can differ widely from each other. For example, the names and order of the column headings can be different. Consequence: Such differences will lead to problems when importing your product data. If no information is provided about what kind of dataset is contained in specific columns, for example: "Which column contains the product name?" or "Which column contains the old product price?", Episerver Campaign cannot read your CSV file properly and cannot correctly classify the individual datasets.

Sole exception: The content interface is able to recognize CSV files that have different structures and process them without any errors if you use an Episerver integration for one of the following e-commerce systems:

- Magento
- OXID
- Shopware

→ If you use an Episerver integration for one of these systems, you can export your product data using the Episerver plugin without any further adjustment necessary.

If you do not use an Episerver integration as well as for all other systems and data sources, you need to use the standardized CSV structure used by Episerver Campaign, hereinafter referred to as "generic CSV structure."

Generic CSV structure

The generic CSV structure used by Episerver Campaign standardizes the structure and naming scheme for the column headings in your CSV files. The generic CSV structure ensures that the import of your product data can proceed without any errors.

To export your CSV files with the generic CSV structure to Episerver Campaign, perform the following steps:

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a) If your system/your data source has a feature that allows the export of data-sets into a CSV file (e.g. a plugin)

➜ Configure the export feature so that the CSV file created has the following structure and column headings:

Generic CSV structure

```
"id";"name";"category";
"text1";"text2";"text3";"text4";"text5";
"text6";"text7";"text8";"text9";"text10";
"link1Text";"link1Url";
"link2Text";"link2Url";
"link3Text";"link3Url";
"image1ImageUrl";"image1AltText";"image1Link";
"image2ImageUrl";"image2AltText";"image2Link";
"image3ImageUrl";"image3AltText";"image3Link";
"image4ImageUrl";"image4AltText";"image4Link";
"image5ImageUrl";"image5AltText";"image5Link";
"image6ImageUrl";"image6AltText";"image6Link";
"addi-
tion-
alData1";"additionalData2";"additionalData3";"additionalData4";"additionalData5";

"addi-
tion-
alData6";"additionalData7";"additionalData8";"additionalData9";"additionalData10";

"addi-
tion-
alData11";"additionalData12";"additionalData13";"additionalData14";"additionalData15";

"addi-
tion-
alData16";"additionalData17";"additionalData18";"additionalData19";"additionalData20";
```

Configuring an export feature generally requires programming work. For more information, consult your system administrator or your software service provider.

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When configuring the export feature for your system, observe the following:

- The CSV file must be RFC-compliant. Technical notes are contained in RFC 4180.
- The character encoding for the CSV file must be set to UTF-8 without BOM.
- The semicolon must be used as a separator.
- If some product data includes quotation marks (inverted commas), these need to be masked with so-called escape characters. If you do not mask quotation marks in your text elements, these will be misinterpreted as code and the import of your product data will be unsuccessful. Use the quotation mark **"** as the escape character.

  Example: If you put a word or a word group in your text into quotation marks, for example "Savoir Vivre", then in your CSV file you need to wrap "Savoir Vivre" with double quotation marks: ""Savoir Vivre"". The outer quotation marks will automatically be recognized as escape characters and will not be displayed in your message text.

b) If you want to save your product data into a CSV file

If your system does not have a feature for exporting product datasets into a CSV file, and you would like to manually create a CSV file with your product data, perform the following steps:

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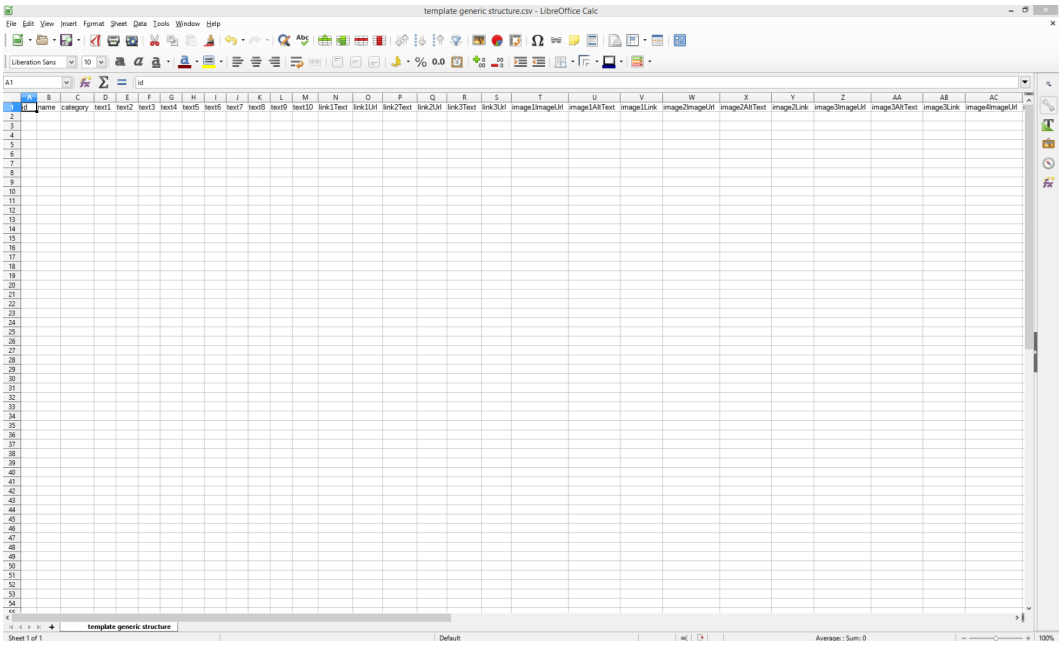
1. Download the template for the generic CSV structure here: template generic structure.csv
2. Open the template using a spreadsheet program such as Microsoft Excel or LibreOffice Calc.



If you need to enter the separator and character encoding when opening the template, select **semicolon** for the separator and **UTF 8 without BOM** for the character encoding. Some programs, such as Microsoft Excel, do not provide the option **UTF-8 without BOM**. If **UTF-8 without BOM** is not offered, select the **UTF-8** option.

When filling out the template in the generic CSV structure, you must always observe the following:

If some product data includes quotation marks (inverted commas), these need to be masked with so-called escape characters. Use the quotation mark **"** as the escape character. If you do not mask quotation marks in your texts with secondary quotation marks, these will be misinterpreted as code and the import of your product data will be unsuccessful.

Example: One of the text elements in your product offering is: *Enjoy the "Savoir Vivre" in Paris*.

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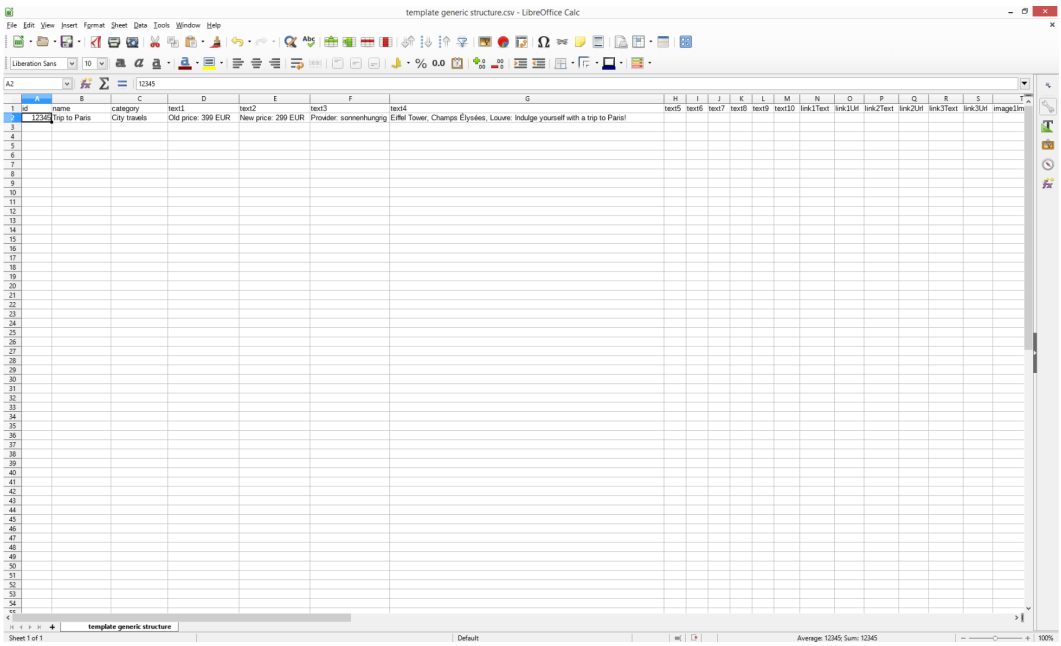
"Savoir Vivre" is contained in quotation marks here. In your CSV file, you need to wrap "Savoir Vivre" with double quotation marks: ""Savoir Vivre"". The outer quotation marks will automatically be recognized as escape characters and will not be displayed in your message text.

3. Begin entering your product data in row 2. The specific data for each product is entered side by side (see image).



Do not change the column headings or their order in row 1. If you change the headings or their order, your product data cannot be loaded into the Template Kit.

If you would like to add another product offer, insert the data again side-by-side in the next row (see image).

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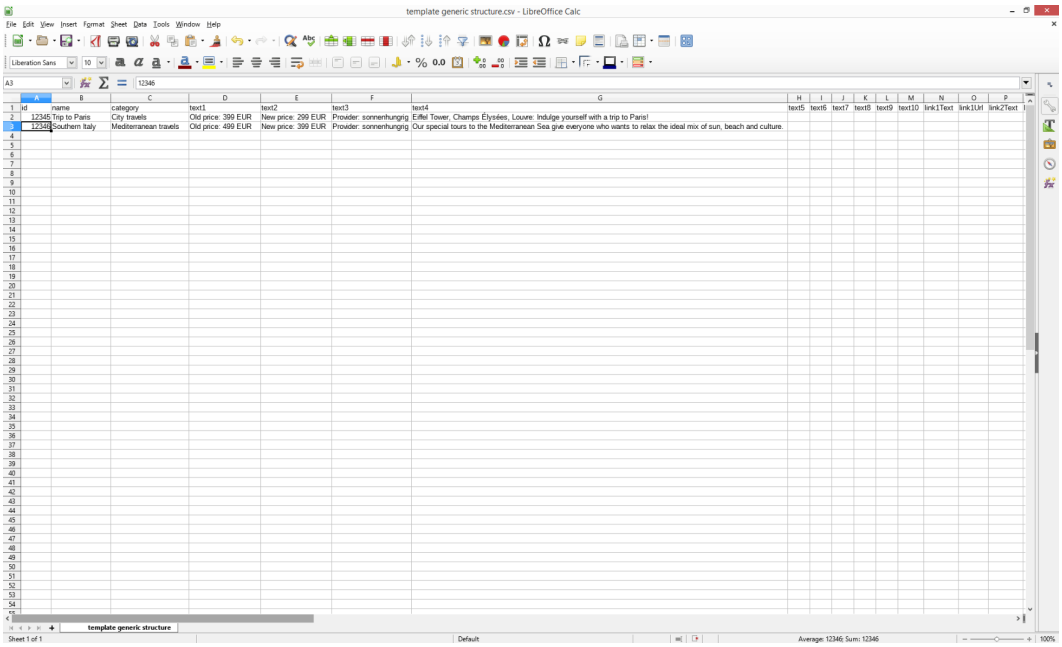

The following table shows which specific product data are written in which column:

Column heading in the template	Product data to be entered
id	Enter the unique product ID here. The product ID will not be shown in your messages. You may only enter a product ID in the document once.
name	Enter a name for your product offer here: Later, in the Template Kit, you can select the product offer by its name to include it in your messages (static CSV article only). Use a descriptive name to easily recognize the product offer. The product ID will not be shown in your messages.
category	Enter the product category here. The product category will not be shown in your messages. With the product category, you can create overview category trees in the Template Kit and e.g. compile related products together to quickly find specific products (static CSV article only). Enter the individual subcategories in this field, separated by hash symbols. Example: Mediterraneantravel#Italy#Sicily A category may have a maximum of 10 sub-categories. Further divisions are not supported.

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Column heading in the template	Product data to be entered
text1 – text10	A total of 10 text fields are available. Enter one piece of information in each field. For example: » the heading for your product offer, e.g. in the text field **text1** » the name of the product to be shown in your message, e.g. in the text field **text2** » the description of your product, e.g. in the text field **text3** » the old price of your product, e.g. in the text field **text4** » the current price of your product, e.g. in the text field **text5** » the supplier/manufacturer of your product, e.g. in the text field **text6** You are free to choose what you would like to enter in the text fields. Adapt the content according to your wishes and the requirements of your product/your service. Generally it is best to organize the components of your product offer chronologically from **text1** through **text10**, which is how they will be shown from top to bottom in the finished product offer. If you are not sure what order is best for you, contact the Episerver customer support team, who will be happy to advise you. The formatting (e.g. text size and text color) of the individual text field contents will be set separately later using an HTML layout.
link1Text – link3Text	Enter the heading for the link or links to your product offer. For example: "Offer", "More Information" or "Buy Now".
link1Url – link3Url	Here, enter the link or links to the page or pages to which recipients will be directed if they click on the link (e.g. the corresponding product page in your webshop).
image1ImageUrl – image6ImageUrl	Enter the URLs for the corresponding product images here. The product images will later be automatically loaded by Episerver Campaign and displayed in your messages.
image1AltText – image6AltText	Enter the alternative text for your images here. An alternative text is the text that will be shown when an image cannot be loaded. Always enter alternative texts, because these can be read by visually impaired people using special programs, thereby promoting an accessible Internet.

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Column heading in the template	Product data to be entered
image1Link – image6Link	Enter a link here that should be link to the product image. If a recipient later clicks on the image, the recipient is forwarded to the target of the associated link. This can be your webshop or also any other address that you would like to connect to the image. To load the image and display it in your messages, avoid mixing up the **ImageLink** and the **ImageURL**, which indicates the saved location of the image. The **ImageLink**, on the other hand, directs the recipient to the link target, which has further information.

4. Once you have entered all product data into the template with generic CSV structure, save the file and rename the file.

You must rename the file with the name that you entered for your CSV file when setting up the content interface paragraphs. If you use a different name, the import of your product data will not be successful. Always ensure that your CSV file has the correct name. If you have forgotten the correct name, contact customer support.

When saving the file, make sure that the spreadsheet program does not assign a new file type. The file must always be saved with the file type CSV or the file extension .csv.

2. Transfer the CSV file to the Episerver server

When you have saved the completed and renamed CSV template, in the next step, it needs to be transferred to your personal directory on the Episerver server.

If you use an Episerver integration for Magento, OXID or Shopware, you do not need to manually perform the transfer. Your integration is configured in such a way that the transfer takes place automatically. If you do not use an Episerver integration, but would still like to automate the transfer, you can do this using e.g. a script. Consult your system administrator or your software service provider for development of an appropriate programming solution.

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To transfer the completed and renamed Episerver template in your directory onto the Episerver server, perform the following steps:

1. Log in to the Episerver server with your user data.

If a user account for the Episerver server has still not been set up for you, contact the Episerver customer support team. Documentation on logging in to the Episerver server can be found here (for Windows): FTP API (Windows).

For macOS, see FTP API (macOS/OS X).

2. Upload the completed and renamed Episerver template to your personal directory on the Episerver server.

If you have multiple directories (folders) on the Episerver server, make sure to save the completed and renamed template in the directory that was set up for your CSV files during configuration of the content interface. If you save the completed and renamed template in another directory, the import of your product data will not be successful.

✔ If you have loaded the completed and renamed template into the correct directory, your current product offers are available to you in the Template Kit for integration into your messages.

It can take some time for your product offer, transferred as a CSV file, to be available in the Template Kit. We thus recommend automatically performing the data transfer at night.

Static CSV article: Load and edit product data

If you have saved your product data as a CSV file in your personal directory on the Episerver server, you can load your product offers into your messages and edit them as necessary directly in the Template Kit (within a so-called "content interface article"). Information on how to change general settings for content interface paragraphs can be found at the end of this chapter.

If you would like to integrate dynamic product data into the Template Kit, go to the a) Use a recipient list as a mapping reference section.

Load product data

To load your product offer into a message, perform the following steps:

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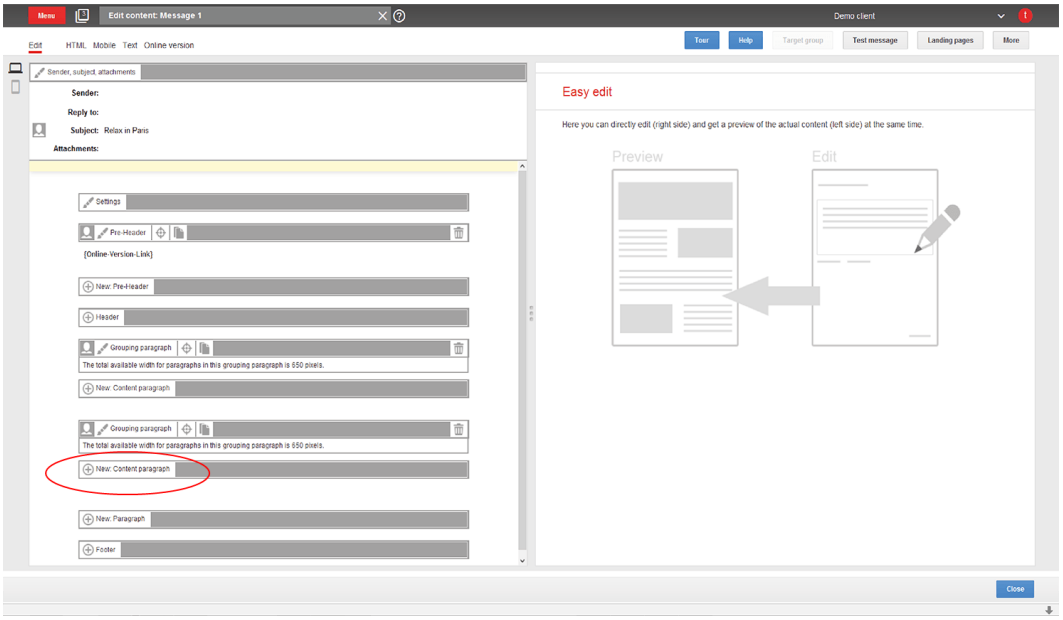
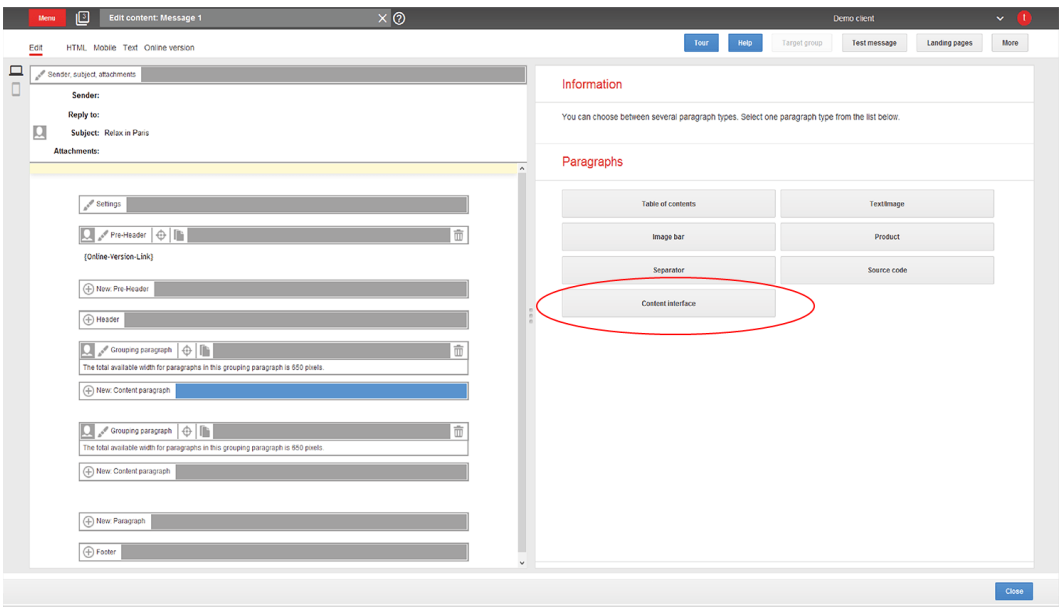
1. While editing a message in the Template Kit, click New: Content paragraph.



✔ A window for selecting the paragraph type opens on the right-hand side.

2. Click Content interface.



✔ The configuration window for the selected paragraph type opens.

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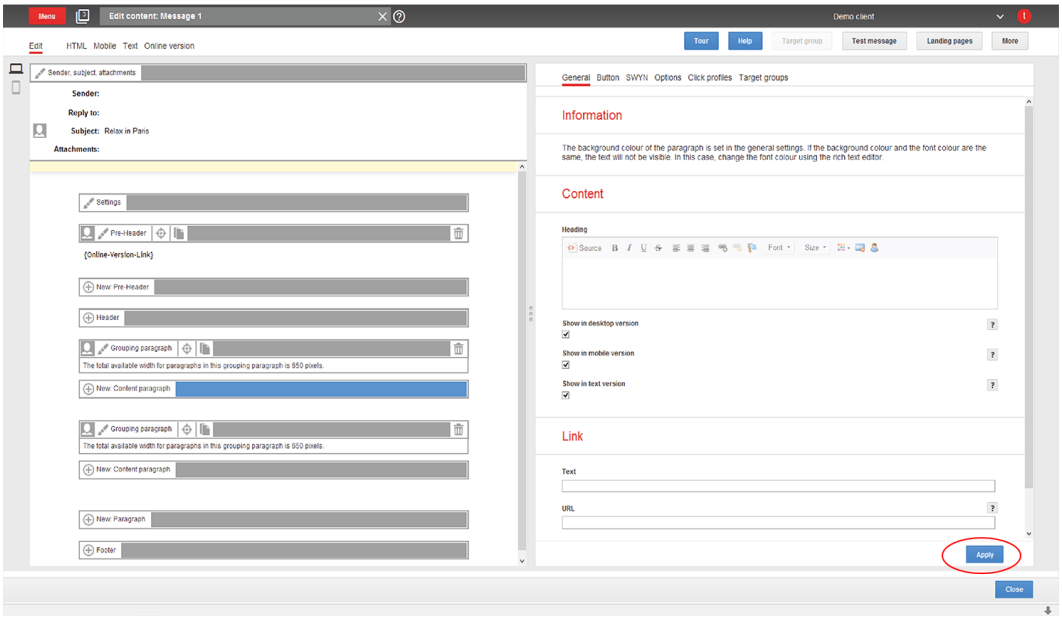
3. Do not change any settings in the configuration window yet. Click **Apply**.



You have created a new content paragraph of type content interface. The newly created content interface paragraph appears on the left side in the preview window. The `Content interface article` button appears below the new content interface paragraph.

Your individual product offers will be created as content interface articles. The content interface articles are subparagraphs of the content interface paragraphs.

4. Create a new content interface article by clicking `Content interface article` on the left side of the preview window.

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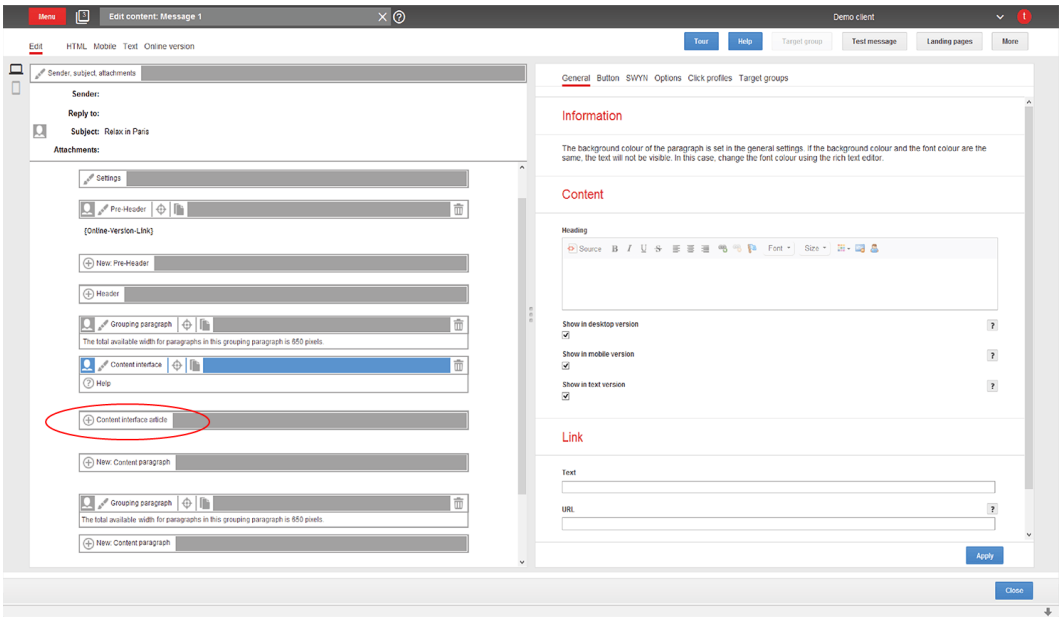
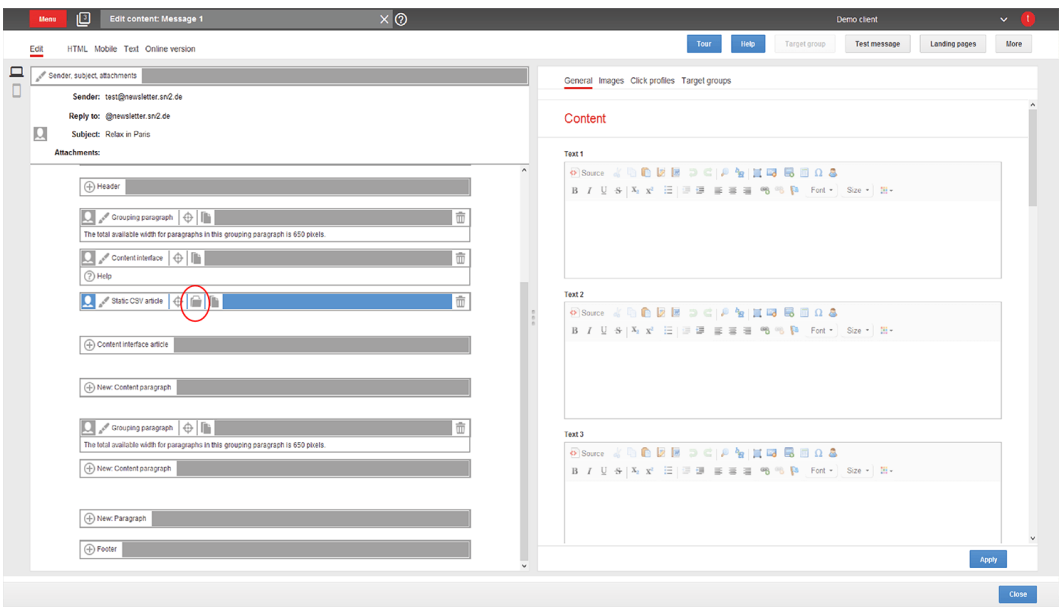


✔ The configuration window for the content interface article opens.

➔ 5. Do not change any settings in the configuration window yet. Click **Apply**.

✔ On the left side of the preview window, the menu bar for the content interface article is expanded to include the button for the content interface: .

➔ 6. Click the content interface symbol: .



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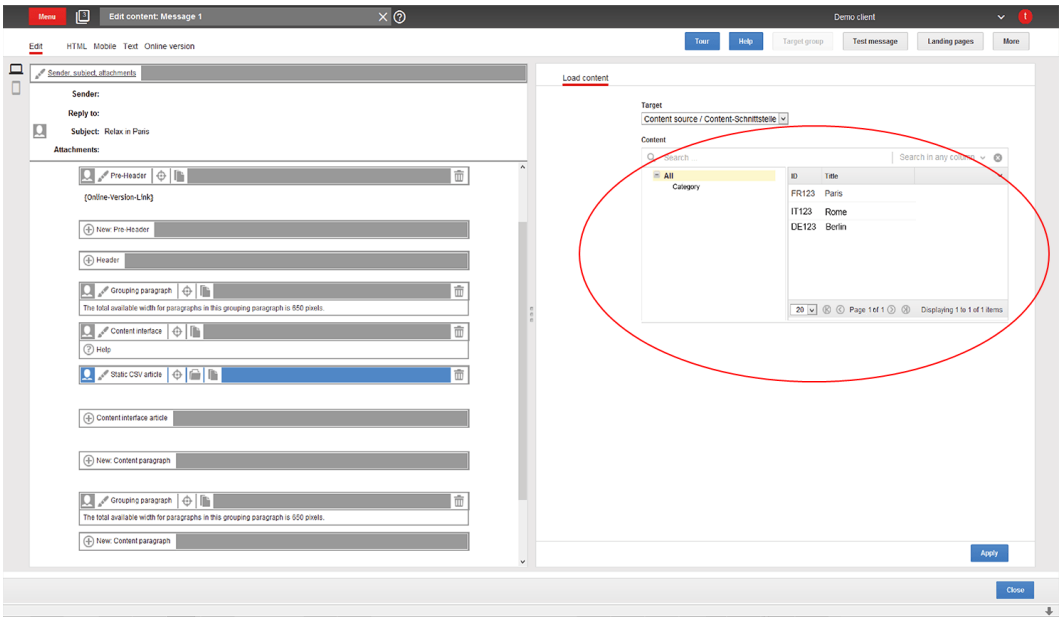
✔ The **Load content** window opens on the right-hand side.

→ 7. In the list, select the product offer that you would like to load into your message.



→ 8. Click Apply.

✔ The product offer is loaded in your message. When the process is completed, the product offer appears on the left side of the preview window.

If you would like to load additional product offers, create a new content interface article for each additional product offer (see steps 4 through 8 in this manual).

Edit product data in content interface article

If your product offer was loaded into your message, you can later edit your product offer as needed directly in the Template Kit. To do this, perform the following steps:

→ 1. On the left side of the preview window, in the menu bar for the corresponding content interface article, click ... .

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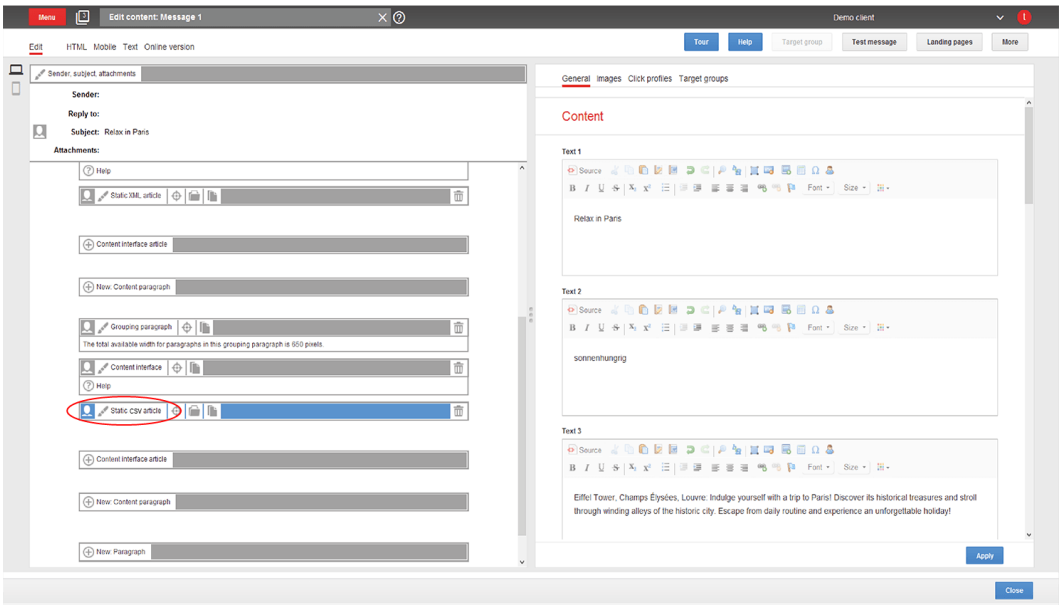

✔ The configuration window for the content interface article opens.

→ 2. Make your changes and confirm them by clicking **Apply**.

You can perform content changes to the text, implement various text formats using the editor or change the layout template (see HTML layouts). However, if you wish to modify the layout template, note that advanced HTML and CSS skills are required. If you would like to modify the layout template but you do not have HTML and CSS skills, contact the Episerver customer support team, who will be happy to make these changes for you.

Do not attempt to change the layout template if you do not have advanced HTML and CSS skills. Attempting to modify the layout template without the proper skills can lead to source code errors and your product offers will not be displayed properly.

We recommend that any changes to the content of your product offers be made to the CSV file. After changes are made, you can re-upload the modified CSV file to the server. This ensures that your product offers are up to date and that no old, subsequently modified content in the CSV file is loaded into the Template Kit. To

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update an existing content interface article, in the menu bar for the content interface article, click **Load content** , select the appropriate product offer again and confirm your selection by clicking Apply.

The content interface paragraph can be configured by the Episerver customer support team so that your product offers are automatically updated at the time of dispatch by comparing it with your CSV file one more time. If this option has been configured for you, any changes to your product offers must be made in your CSV file. If you only perform changes in the Template Kit, these will be automatically overwritten at the time of dispatch with the old content from the CSV file.

Use XML

If you do not want to save your product data as a CSV file, you can also use the XML format for the content interface paragraphs. XML is an open international standard enabling the transmission of data over the Internet in structured form.

If you choose this option, do not save your product data with the CSV solution on the Episerver server. Instead, Episerver Campaign will retrieve your product data from your webspace or your server using a so-called HTTP request. When this request is made, your product data must:

1. already be present on your webspace or server as an XML file (static product data)
2. or the HTTP request will cause the product data to be generated on your server in XML format and returned in response to the request (dynamic product data).

Which option you choose (static or dynamic product data) depends on the system environment of your company. Contact your system administrator to find out which technical implementation is in use.

1. Save static product data on the server

If you would like to save your product data statically as XML files on your webspace or server, you need to save each product in its own XML file. Summarizing multiple products in a single XML file (as is done with the CSV solution) is not possible.

To save a product as an XML file, perform the following steps:

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1. Open a text editor such as Notepad (Windows) or Textedit (macOS/OS X).

To create a product offer for the content interface paragraphs, no special software is necessary. A simple text editor is sufficient.

2. Create a new document in the text editor.

Make sure that you have the correct character encoding (UTF-8) in your text document. If your text document is not automatically set to UTF-8, change the character encoding as necessary. If you create the text document with another character encoding, the text may not be represented properly.

3. Copy the following code into your document:

```
<?xml version="1.0" encoding="UTF-8"?>
<element>
<property name="id">123456</property>
<property name="text1"><![CDATA[<b>Text field 1</b>]]></property>
<property name="text2"><![CDATA[Text field 2]]></property>
<property name="text3"><![CDATA[Text field 3]]></property>
<property name="text4"><![CDATA[Text field 4]]></property>
<property name="text5"><![CDATA[Text field 5]]></property>
<property name="text6"><![CDATA[Text field 6]]></property>
<property name="text7"><![CDATA[Text field 7]]></property>
<property name="text8"><![CDATA[Text field 8]]></property>
<property name="text9"><![CDATA[Text field 9]]></property>
<property name="text10"><![CDATA[Text field 10]]></property>
<property name="link1Text"><![CDATA[Text for link 1]]></property>
<property name="link1Url"><![CDATA[URL for link 1]]></property>
<property name="link2Text"><![CDATA[Text for link 2]]></property>
<property name="link2Url"><![CDATA[URL for link 2]]></property>
<property name="link3Text"><![CDATA[Text for link 3]]></property>
<property name="link3Url"><![CDATA[URL for link 3]]></property>
<property name="image1ImageUrl"><![CDATA[Image URL for image
1]]></property>
<property name="image1AltText"><![CDATA[Alternative text for image
1]]></property>
<property name="image1Link"><![CDATA[Link for image 1]]></property>
```

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```
<property name="image2ImageUrl"><![CDATA[Image URL for image
2]]></property>
<property name="image2AltText"><![CDATA[Alternative text for image
2]]></property>
<property name="image2Link"><![CDATA[Link for image 2]]></property>
<property name="image3ImageUrl"><![CDATA[Image URL for image
3]]></property>
<property name="image3AltText"><![CDATA[Alternative text for Image
3]]></property>
<property name="image3Link"><![CDATA[Link for image 3]]></property>
<property name="image4ImageUrl"><![CDATA[Image URL for image
4]]></property>
<property name="image4AltText"><![CDATA[Alternative text for image
4]]></property>
<property name="image4Link"><![CDATA[Link for image 4]]></property>
<property name="image5ImageUrl"><![CDATA[Image URL for image
5]]></property>
<property name="image5AltText"><![CDATA[Alternative text for image
5]]></property>
<property name="image5Link"><![CDATA[Link for image 5]]></property>
<property name="image6ImageUrl"><![CDATA[Image URL for image
6]]></property>
<property name="image6AltText"><![CDATA[Alternative text for image
6]]></property>
<property name="image6Link"><![CDATA[Link for image 6]]></property>
</element>
```

Use the full code snippet to carry out the following example in steps 4 through 12. The only mandatory field is the product ID. All other values are optional. If you do not need certain values, skip the respective step and delete the corresponding line of code in your text document.

Alternatively, you can also leave the unneeded lines of code empty, for example if you would like to enter the information later.

4. Enter the product ID in the first property row. The numerical string "123456" is used as a placeholder. You must insert your product ID precisely between the pointed brackets.

Example: Your product has the product ID "FR123". The product ID inserted into the code will then appear as follows:

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```
<property name="id">FR123</property>
```

Use only alphanumeric characters (letters and numbers) in your product ID. Using special characters can cause errors when importing your product data.

5. In the 2nd through 11th property rows (**text1** through **text10**), enter up to ten text elements for your product offer. "Text field 1", "Text field 2" and "Text field 3" etc. are entered as placeholders for your text elements. The text elements can include (for example): the heading for the product offer, the product name, the product category, the product description, the old price, the current price, the manufacturer/supplier etc. You are free to choose what you would like to enter in the text fields. Adapt the content according to your wishes and the requirements of your product/your service. The respective text element must be inserted between the pointed brackets, after "CDATA".

Example: The header of the product offer is: "Relax in Paris". The header inserted into the code will then appear as follows:

```
<property name="text1"><![CDATA[Relax in Paris]]></property>
```

Generally it is best to organize the components of your product offer chronologically from **text1** through **text10**, which is how they will be shown from top to bottom in the finished product offer. If you are not sure what order is best for you, contact customer support.

The formatting (e.g. text size and text color) of the individual text field contents will be set separately later using an HTML layout.

6. In the 12th property row, enter the heading for the link to your product offer. For example: "Offer", "More Information" or "Buy Now". "Text for Link 1" is entered as a placeholder. The link text must be inserted between the pointed brackets, after "CDATA".

Example: The link text is: "Book now". The link text inserted into the code will then appear as follows:

```
<property name="link1Text"><![CDATA[Book now]]></property>
```

7. In the 13th property row, enter the URL that leads to the product page in your webshop. "URL for Link 1" is entered as a placeholder. The URL must be inserted between the pointed brackets, after "CDATA".

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Example: The URL of the product page is http://www.sonnenhungrig.com/paris. The URL inserted into the code will then appear as follows:

```
<property name="link1Url"><![CDATA
[http://www.sonnenhungrig.com/paris]]></property>
```

8. In the property rows 14 through 17, you can enter two additional links and two additional link texts if your product offer needs more than one link. Enter the information as specified in steps 6 and 7.

Example applications: Next to the link to the booking page for the Paris trip offered, another link leads to the current weather at the destination.

9. Enter the URL to the product image in the 18th property row. Episerver Campaign loads the product image using the given URL and shows it in your message. "Image URL for image 1" is entered as a placeholder. The URL must be inserted between the pointed brackets, after "CDATA".

Example: The URL of the product image is "http://www.sonnenhungrig.com/eiffeltower.jpg". The URL of the product image inserted into the code will then appear as follows:

```
<property name="image1ImageUrl"><![CDATA
[http://www.sonnenhungrig.com/eiffeltower.jpg]]></property>
```

10. Enter the alternative text for your product image in the 19th property row. An alternative text is the text that will be shown when an image cannot be loaded. Always enter alternative texts, because these can be read by visually impaired people using special programs, thereby promoting an accessible Internet. "Alternative text for Image 1" is used as a placeholder. The alternative text must be inserted between the pointed brackets, after "CDATA".

Example: The alternative text for your product is "The Eiffel Tower in Paris in springtime". The alternative text for the product image inserted into the code will then appear as follows:

```
<property name="image1AltText"><![CDATA[The Eiffel Tower in Paris in
springtime]]></property>
```

11. Enter a URL for the product image in the 20th property row. If a recipient later clicks on the image, he or she will be led to the associated URL. This can be your webshop or also any other address that you would like to connect to the image. "Link for image 1" is used as a placeholder. The URL associated with your product image must be inserted between the pointed brackets, after "CDATA".

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To load the image and display it in your messages, be certain that you are using the **ImageURL** (step 9 in this list) which indicates the saved location of the image. The **ImageLink**, on the other hand, directs the recipient to the link target, which has further information.

Example: The URL associated with your product image is: "http://www.sonnenhungrig.com/sightsinfrance". The URL inserted into the code will then appear as follows:

```
<property name="image1ImageUrl"><![CDATA
[http://www.sonnenhungrig.com/sightsinfrance]]></property>
```

12. In the property lines 21 through 35, up to five additional URLs for the locations where the product images are stored can be entered, as well as five additional alternative texts and five additional links that direct the recipient to the link target when clicked. This means: Up to six product images, each with an alternative text and a link can be associated with each product offer. Enter the information as specified in steps 9 and 11 of this manual.
13. Once you have completed all entries, save your text document. For the file name, use the product ID (the value that you have inserted into the code for the "id" property).

You must save the text document with the file type .xml. In many text editors, select the option **Save as** and then select the corresponding file type from the list.

14. After saving, delete the file extension for your text document. If (for example) your text document is named "ParisTrip01.xml", remove the file extension .xml to rename the file as "ParisTrip01".

Do not forget to remove the file extension. If you do not remove the file extension, your product data cannot be loaded.

15. Save the text document in your webspace or on your server in the directory that you entered when you set up the product paragraphs with the content interface.

Never change the location where your product description text documents are saved without consulting the Episerver customer support team. If (for example) you have given the URL "http://www.mycompany.com/products" as the location,

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you must always save your product data text documents in this directory. If you save your text documents in another directory without consulting the Episerver customer support team (for example, "http://www.mycompany.com/products/specialoffers"), it will no longer be possible to load your product data using the content interface.

✔ Once you have successfully saved your text document in your webspace or on your server, you can access your product offer in the Template Kit. Follow the individual steps in the Static XML article: Load and edit product data section to upload your product offer into the Template Kit using the content interface.

2. Generate dynamic product data on the server

The preparation of dynamic product data generally follows the same scheme as the preparation of static product data. The difference: The XML files are not prepared manually, but are loaded from a database when called (by HTTP request) via the content interface and automatically generated as XML. Your company needs program this process. Consult with your system administrator if you would like to generate dynamic product data instead of having to prepare product offers manually.

When performing the configuration, note the following:

1. The XML feed must be UTF-8 encoded.
2. The product ID must be positioned at the end of the URL.

✔ Correct:
`http://request.example.com/product?id=123456789`

✘ Incorrect:
`http://request.example.com/product/123456789/data`

Static XML article: Load and edit product data

Once your product data are available as XML files in your webspace or on your server, you can load your product data into the Template Kit and after import you can edit them as needed directly in the Template Kit. Information on how to change general settings for content interface paragraphs can be found at the end of this chapter.

If you would like to integrate dynamic product data into the Template Kit, go to the a) Use a recipient list as a mapping reference section.

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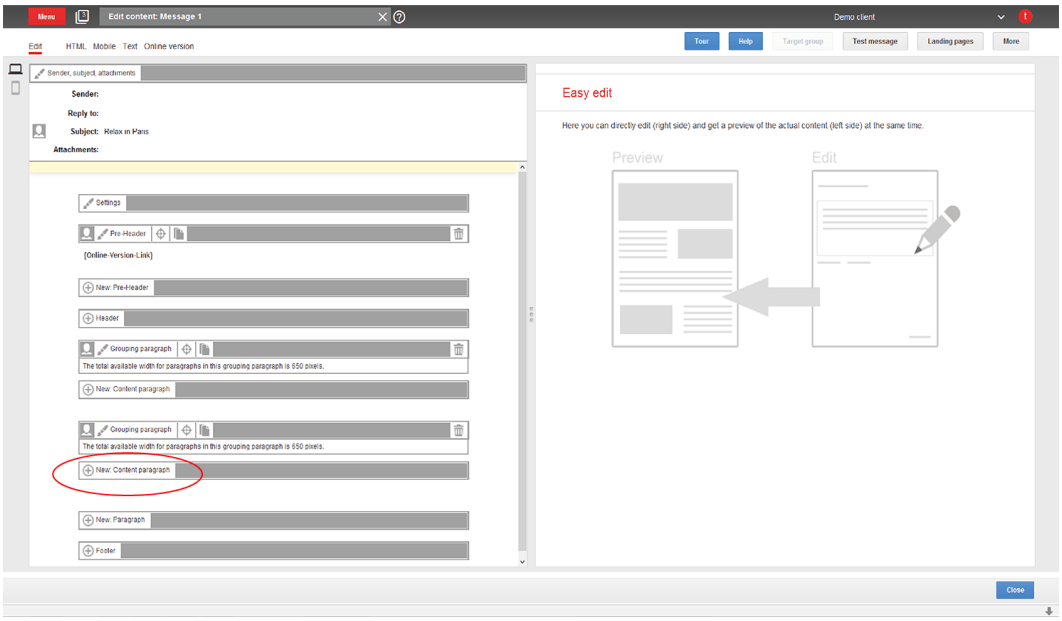
Load product data

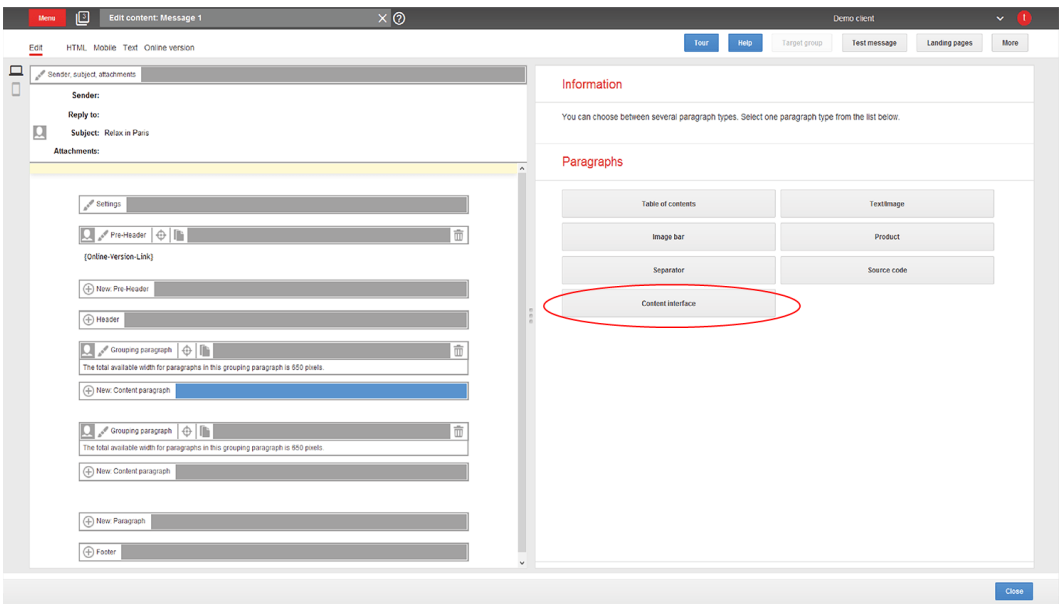
To load your XML format product data from your webspace or your server into the Template Kit, perform the following steps:

1. In the Template Kit, click `New: Content paragraph`.



✔ On the right-hand side, a window for selecting the paragraph type opens.

2. Click `Content interface`.



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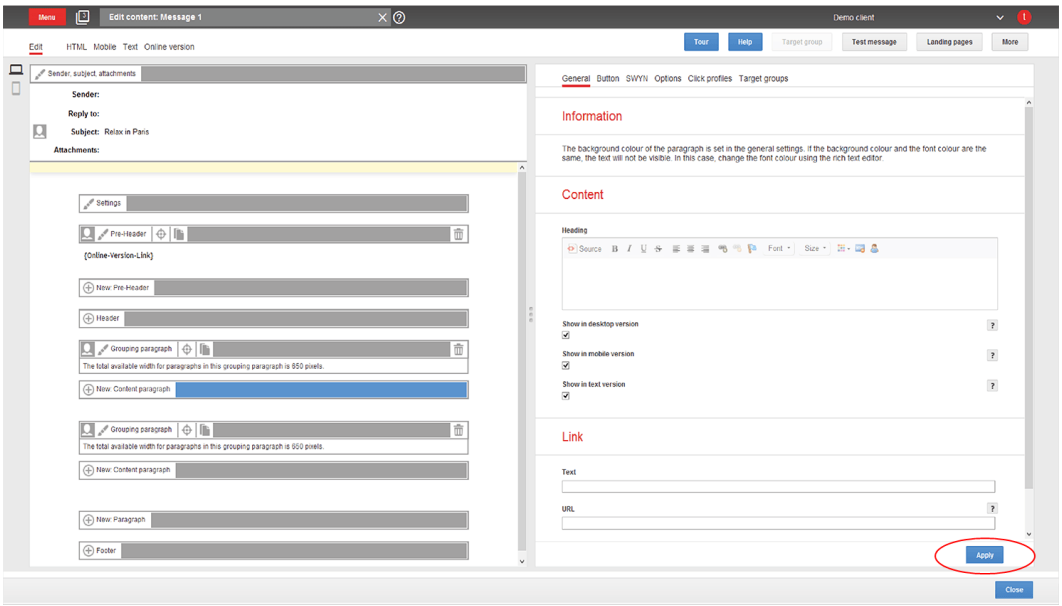
✔ The configuration window for the selected paragraph type opens.

➔ 3. Do not change any settings in the configuration window yet. Click Apply.



✔ You have created a new content paragraph of type content interface. The newly created content interface paragraph appears on the left side in the preview window. The Content interface article button appears below the new content interface paragraph.

Your individual product offers will be created as content interface articles. The content interface articles are subparagraphs of the content interface paragraphs.

➔ 4. Create a new content interface article by clicking Content interface article on the left side of the preview window.

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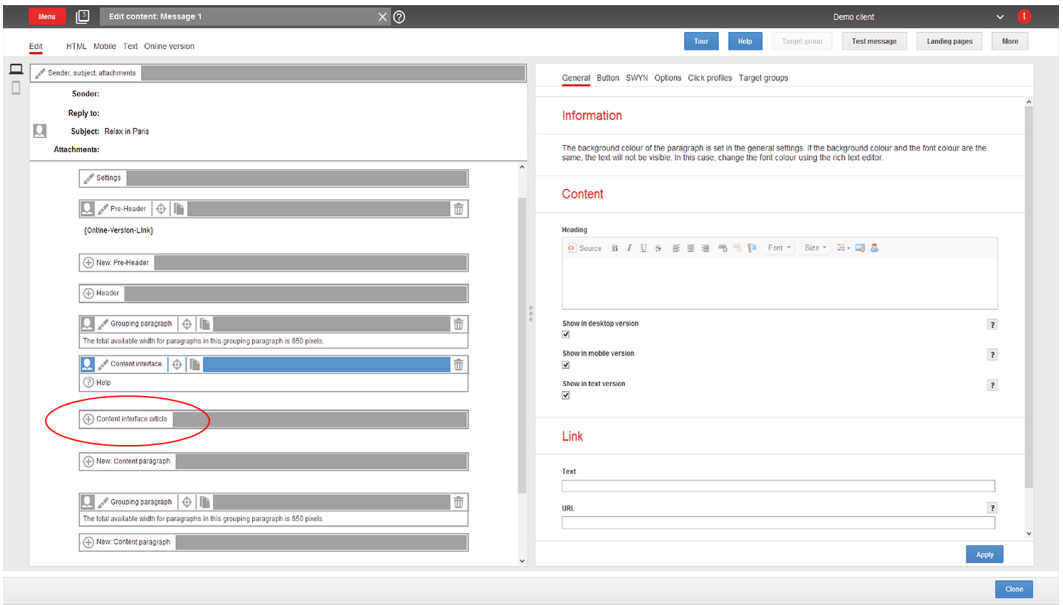
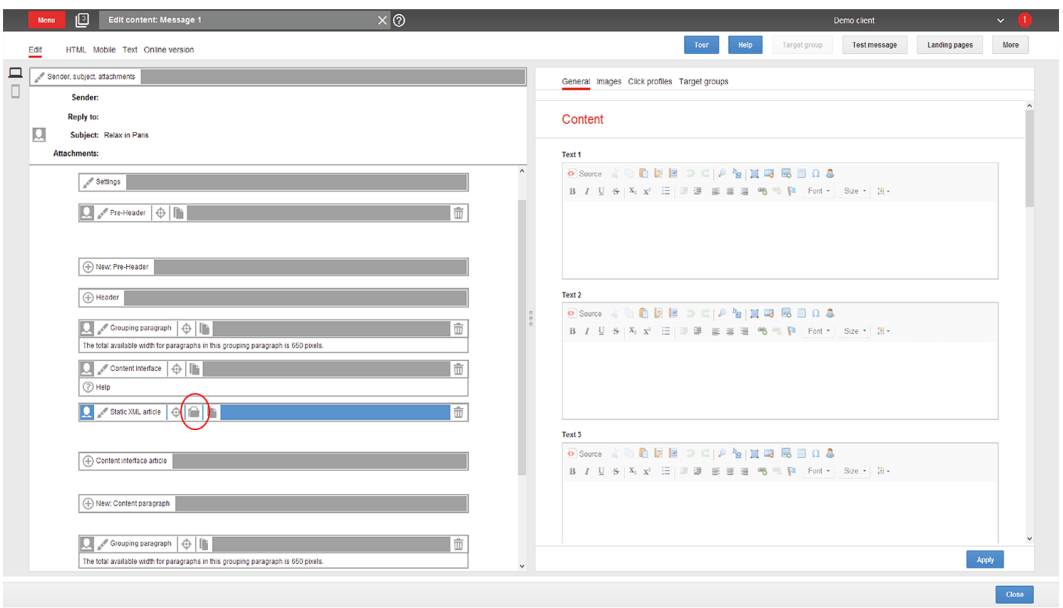


✔ The configuration window for the content interface article opens.

→ 5. Do not change any settings in the configuration window yet. Click **Apply**.

✔ On the left side of the preview window, the menu bar for the content interface article is expanded to include the button for the content interface: .

→ 6. Click on the content interface symbol: .



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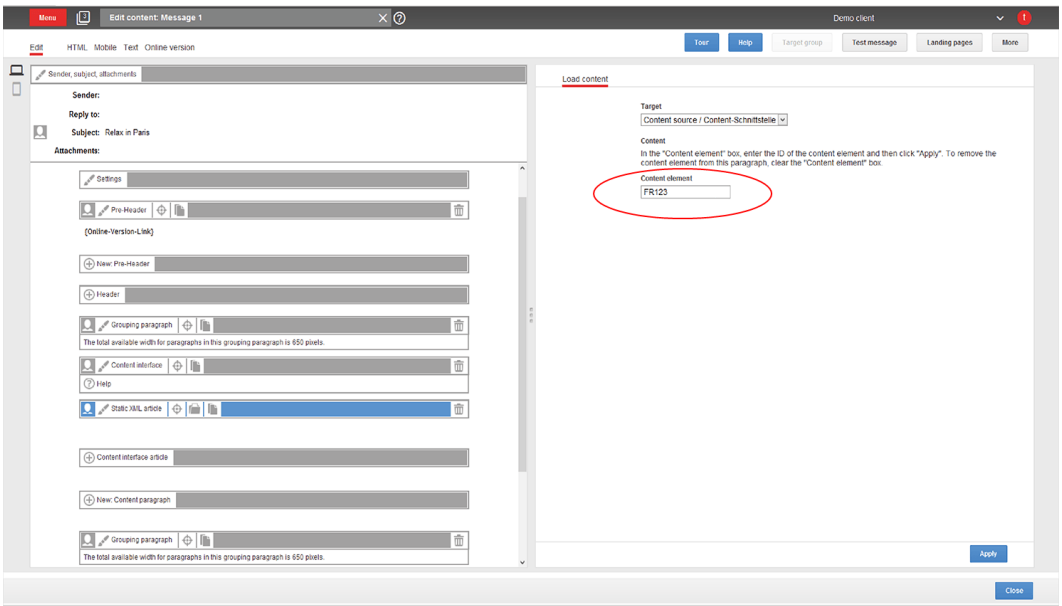
✔ The **Load content** window opens on the right-hand side.

→ 7. In the **Content element** box, enter the ID of the product offer that you would like to load into the Template Kit.



→ 8. On the bottom right of the window, click Apply.

✔ Your product data will be loaded via the content interface from your webspace or your server into the Template Kit. Once the import is completed, the product offer will appear on the left side of the preview window.

If you would like to load additional product offers, create a new content interface article for each additional product offer (see steps 4 through 8 in this manual).

Edit product data in content interface article

If your product offer was loaded into your message, you can later edit your product offer as needed directly in the Template Kit. To do this, perform the following steps:

→ 1. On the left side of the preview window, in the menu bar for the corresponding content interface article, click ... .

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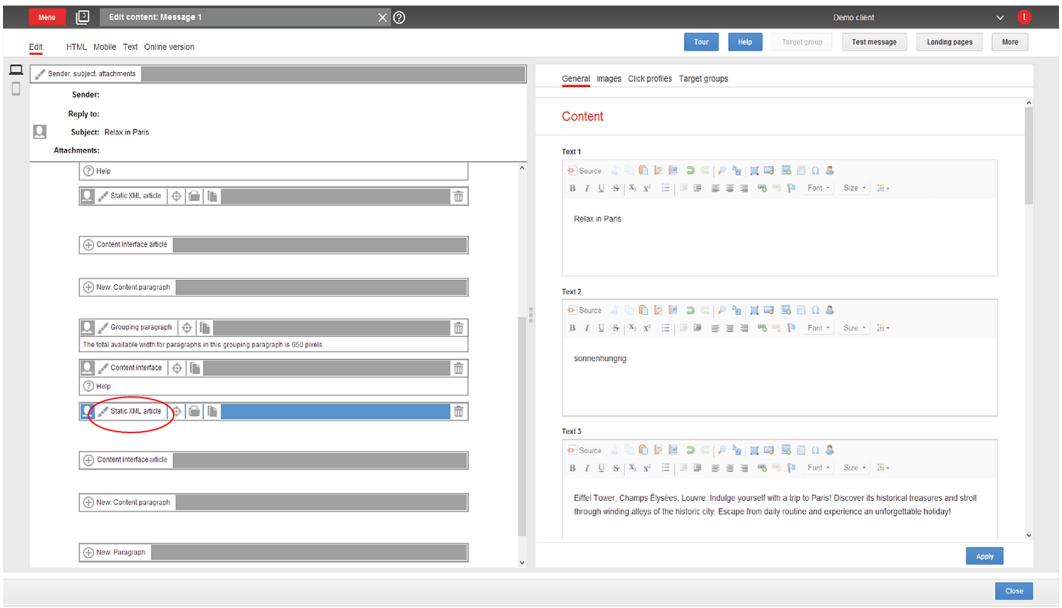

✔ On the right-hand side, a window for selecting the paragraph type opens.

→ 2. Make your changes and confirm them by clicking **Apply**.

You can perform content changes to the text, implement various text formats using the editor or change the layout template (see HTML layouts). However, if you wish to modify the layout template, note that advanced HTML and CSS skills are required. If you would like to modify the layout template but you do not have HTML and CSS skills, contact the Episerver customer support team, who will be happy to make these changes for you.

Do not attempt to change the layout template if you do not have advanced HTML and CSS skills. Attempting to modify the layout template without the proper skills can lead to source code errors and your product offers will not be displayed properly.

We recommend that any changes to the content of your product offers be made to the XML file. After changes are made, you can re-upload the modified XML file to the server. This ensures that your product offers are up to date and that no old, subsequently modified content in the XML file is loaded into the Template Kit. To update an existing content interface article, in the menu bar of the content interface article, click **Load**

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content , enter the corresponding product ID and confirm your selection by clicking Apply .

The content interface paragraph can be configured by the Episerver customer support team so that your product offers are automatically updated at the time of dispatch. If this option has been configured for you, any changes to your product offers must be made in your XML file. If you only perform changes in the Template Kit, these will be automatically overwritten at the time of dispatch with the old content from the XML file.

Dynamic CSV and XML articles

You can use dynamic CSV and XML articles to send personalized product recommendations. The corresponding product data is loaded from the CSV or XML product data source for each individual recipient at the time of sending.

In contrast to static articles, your image files for dynamic articles are not integrated via the Episerver server. Instead, URLs referencing the image files are inserted into the mailing. The actual image content is then loaded by your server during the dispatch process. You must therefore ensure that your server is capable of handling a large number of requests at the time the mailing is being sent.

To create dynamic CSV or XML articles and send different personalized content to each recipient, perform the following steps:

Requirements

- Dynamic CSV articles and/or XML items are enabled in your client.
- You have prepared a CSV product data source file and uploaded this to your personal directory on the server, see chapter a) If your system/your data source has a feature that allows the export of datasets into a CSV file (e.g. a plugin) or you have configured an XML source, see chapter Use XML.

Create mapping reference

To send a different product to each recipient, you must create a mapping reference. The mapping reference lists the individual product recommendations for each recipient using the product ID.

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When sending the message, Episerver Campaign first reads the product ID from the mapping reference and then uses this product ID to load the corresponding product data from the CSV or XML data source. This loads different products into the message for each recipient.

There are two ways of creating a mapping reference:

1. Using a recipient list: Import the product IDs to be mapped into a recipient list field in your recipient list.
2. Using a mapping file: Create a CSV file that contains the recipient ID of each individual mailing recipient on separate lines. Add an additional column to each recipient ID that specifies the product ID to be mapped.

   Structure of the mapping file

A	B
recipient1@example.com	ProductID123
recipient2@example.com	ProductID456
recipient3@example.com	ProductID789
etc.	etc.

Several product IDs may be entered into the recipient list field and the mapping file for a single recipient. To do this, place a separator symbol, such as a comma, between each product ID.

When placing several product IDs after one another, do not leave a space after the separator symbol.

✔ Correct: `123,456,789`

✘ Wrong: `123, 456, 789`

a) Use a recipient list as a mapping reference

If you would like to use your recipient list as the mapping reference, perform the following steps:

→ 1. Contact the Episerver customer support team who will set up the relevant recipient list field for mapping product IDs.

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2. Once the recipient list field has been set up, transfer the recipient-specific product IDs into your recipient list.

Several methods are available for importing recipient-specific product IDs into your recipient lists including CSV file import or the SOAP API. Contact your Episerver system administrator and the customer support team to determine which solution is the most appropriate for you.

A maximum of 256 characters may be transferred into the recipient list field. If you would like to exceed this limit, contact the Episerver customer support team.

b) Use a mapping file as a mapping reference

If you would like to use a mapping file as the mapping reference, perform the following steps:

1. Create a CSV file in which the first column contains the recipient IDs for all recipients. Each recipient ID must be on a new line.
2. In the second column, enter the individual product IDs for each recipient line.

Several methods are available for creating the mapping file. For example, you may export a CSV file from your e-commerce system. For more information, consult your system administrator or your software provider.

3. Once you have created the mapping file, transfer it to the server. Place it into the directory that you specified as the location of your mapping file when setting up dynamic articles.

Alternatively, use the additional "Upload file" feature of Episerver Campaign. This feature is located in the start menu under **Special**. If this additional feature is not available in your client, contact the Episerver customer support team who will be happy to enable this feature for you.

Creating dynamic CSV and XML articles

To create a dynamic CSV or XML article in the Template Kit, perform the following steps:

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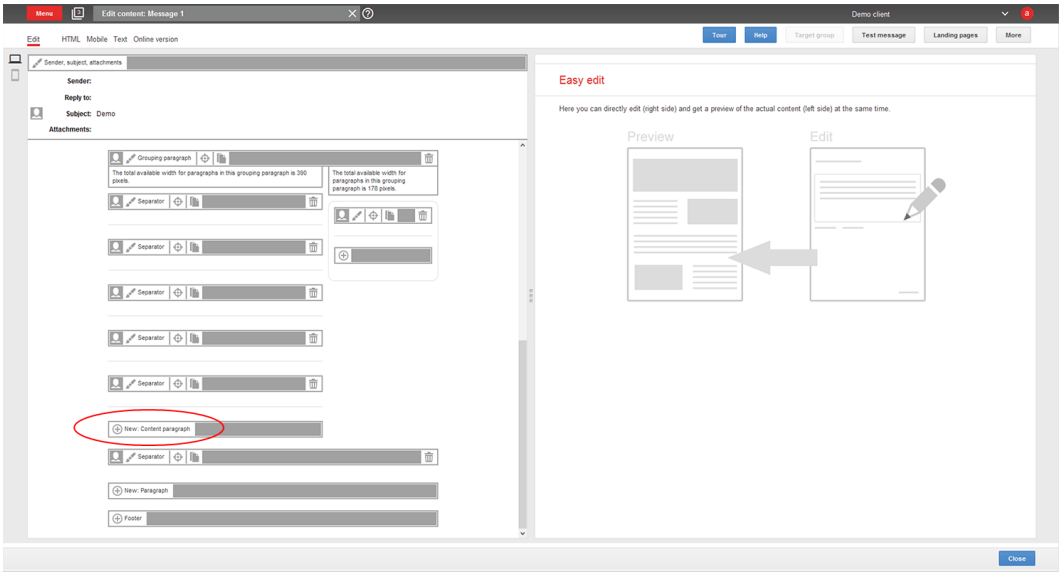
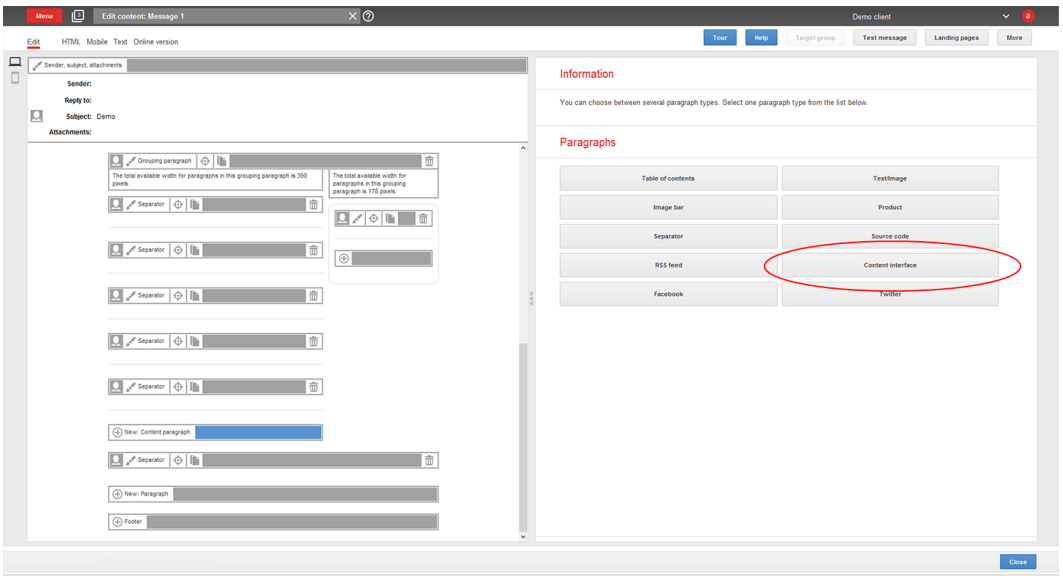
1. In the Template Kit, create a new content paragraph by clicking `New: Content paragraph`.



2. Select the content interface paragraph type by clicking `Content interface`.



3. Click `Apply`.

✔ You have created a new content paragraph of type content interface. On the left-hand side of the preview is the `Content interface article` button.

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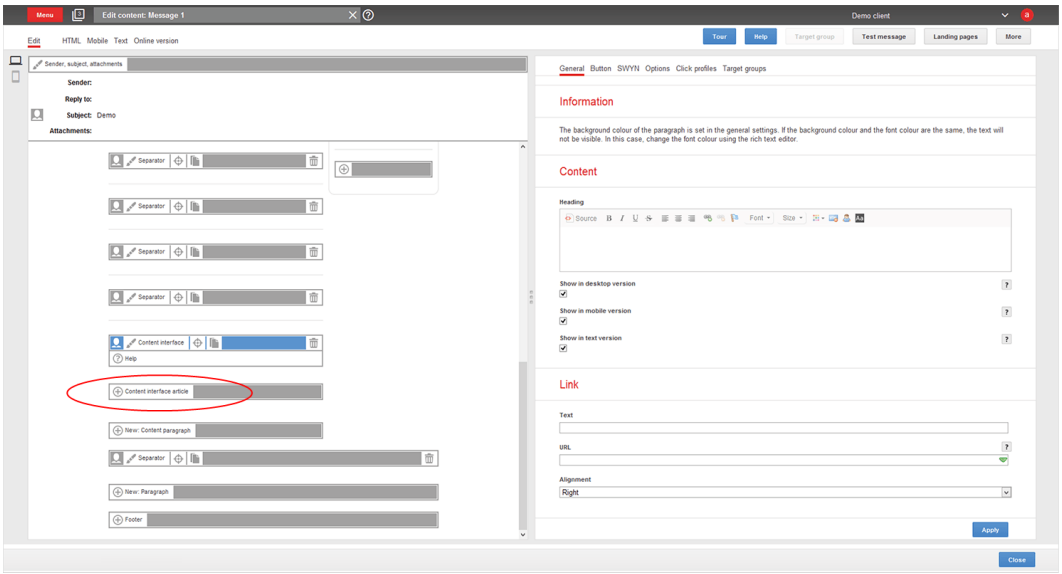

4. Click Content interface article .

✔ You have successfully created a new content interface article. The configuration window for the content interface article will open on the right.

Configure dynamic CSV and XML articles

After you have created a dynamic CSV or XML article, you must configure it. To do this, perform the following steps:

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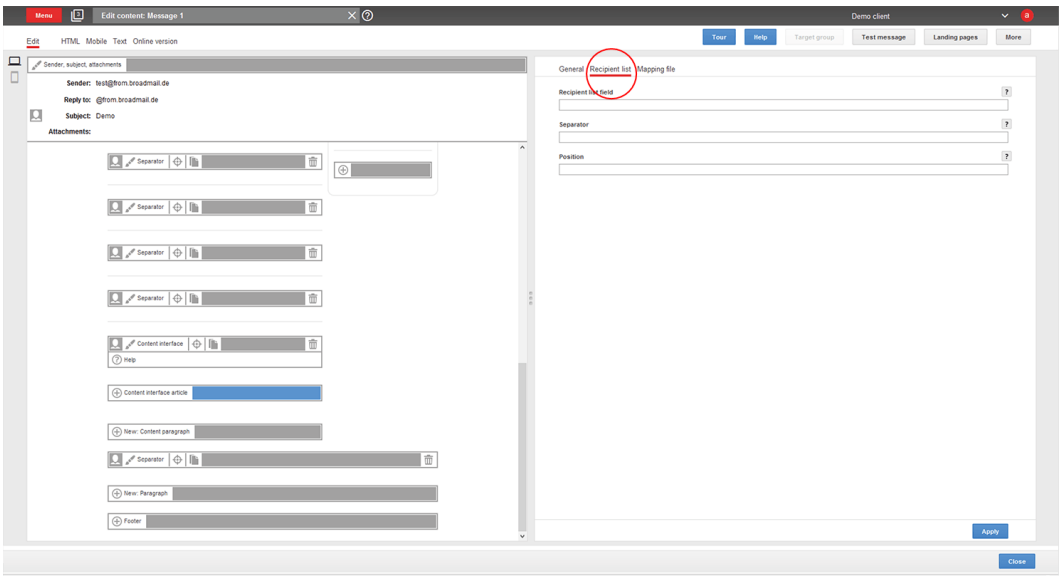
a) If you are using your recipient list as the mapping reference

1. On the right of the content interface article configuration window, open the **Recipient list** tab.



2. In the **Recipient list field** box, enter the name of the recipient list field that contains the product ID. Enclose the name with curly brackets: {Name}.
3. If multiple product IDs are contained in the recipient list field, enter the separator which is used between the individual product IDs.

> If you enter nothing, a comma will be assumed.

4. If the recipient list field contains multiple product IDs, enter the position number of the product that is to be loaded.

   Example: Your recipient list field contains three comma-separated product IDs: "123,456,789." To select the product with the product ID "789", enter the position number "3" since the product ID "789" is located at the third position in the chain "123, 456, 789." Note: If you do not enter a position number, the product in the first position will be selected automatically.

5. Click Apply.

✔ You have successfully configured the content interface article. To the left of the preview you can see the configuration data on the content interface article. At the time the message is sent, the product data is loaded from the CSV or XML product data source using this configuration.

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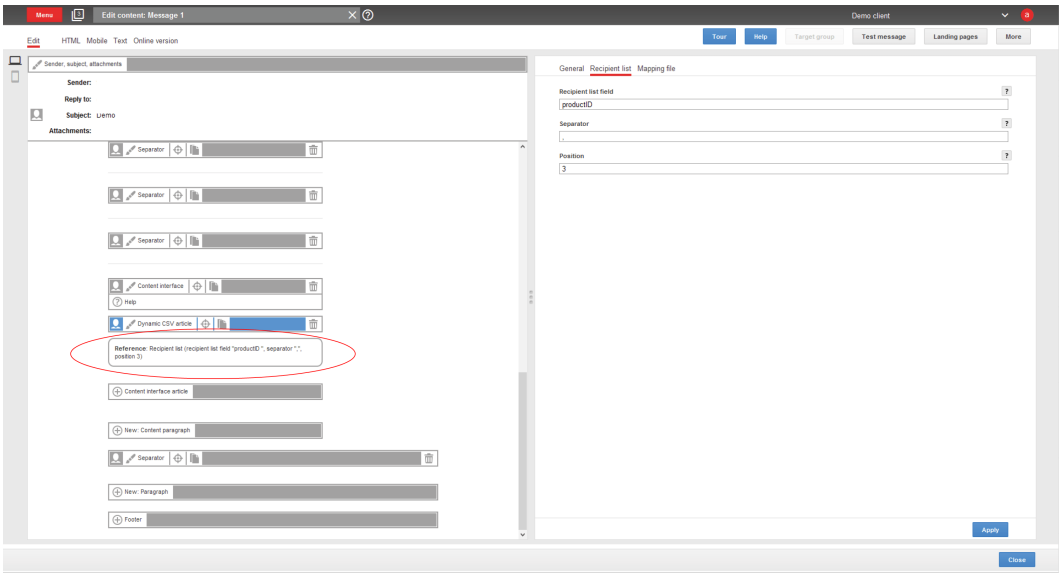
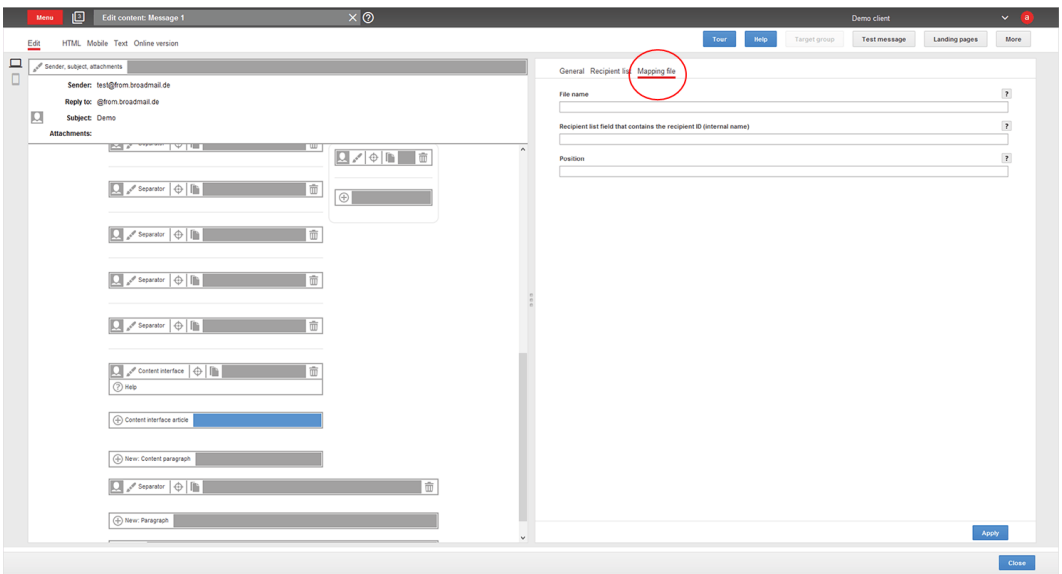


b) If you are using a mapping file as a mapping reference

1. On the right of the content interface article configuration window, open the **Mapping file** tab.



2. In the **File name** box, enter the name of the mapping file.
3. In the **Recipient list field that contains the recipient ID (internal name)** box, enter the internal name for the recipient list field. If you do not know the internal name, contact the Episerver customer support team.
4. If the mapping file in the product ID column contains multiple product IDs, enter the position number of the product that is to be loaded.

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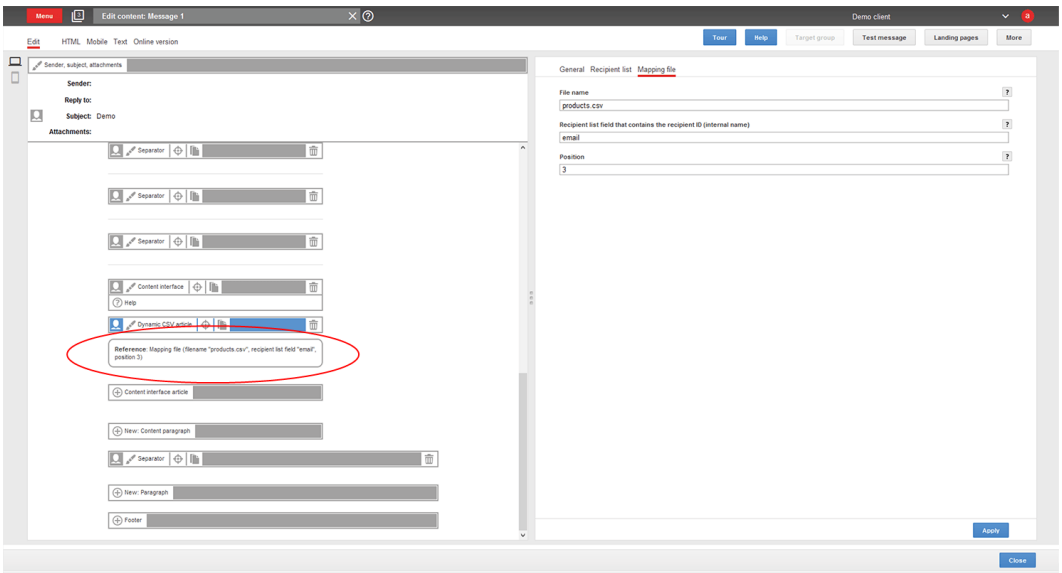
Example: Three product IDs are contained in the product ID column: "123,456,789". To select the product with the product ID "789", enter the position number "3" since the product ID "789" is located at the third position in the chain "123, 456, 789". Note: If you do not enter a position number, the product in the first position will be selected automatically.

→ 5. Click Apply.

✔ You have successfully configured the content interface article. To the left of the preview you can see the configuration data on the content interface article. At the time the message is sent, the product data is loaded from the CSV or XML product data source using this configuration.



General settings

Your individual product offers will be created as content interface articles. The content interface articles are subparagraphs of the content interface paragraphs. Within a single message, you can create multiple content interface paragraphs using multiple lower-level content interface articles. To apply changes to a higher-level content interface paragraph, perform the following steps:

→ 1. Click Content Interface in the left-hand side of the preview, in the menu bar of the content interface paragraph.

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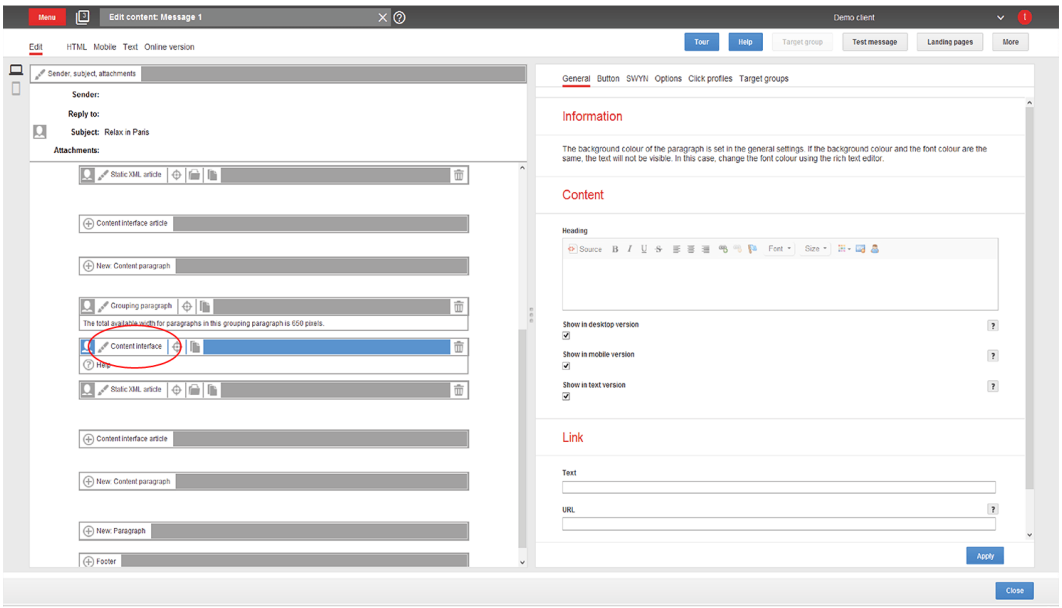

✔ On the right-hand side, the configuration window for the general settings for the content interface paragraphs open.

➔ 2. The following tables in the various tabs can be used to apply general settings to a higher-level content interface paragraph. Change the general settings as desired and confirm your entries by clicking Apply in the lower right.

- General
- Button
- SWYN
- Options
- Click profiles
- Target groups

General

Parameter	Description
Content...	
Heading	Enter a heading for the paragraph.
Show in desktop version	Select this check box to show the paragraphs in the desktop version of the mailing.
Show in	Select this check box to show the paragraph in the mobile version of the mailing. The

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Parameter	Description
mobile version	**Activate mobile version** setting in the general settings must be selected for this option to take effect. If you have deactivated the mobile version, then this feature will not be applied.
Show in text version	Select this check box to show the paragraph in the text version of the mailing.
Link...	
Text	A link to this text will be included in the mailing.
URL	Enter a link here (e.g. the landing page for the product group).
Alignment	You can position the link on the right-hand side, the left-hand side or in the center.

Button

More information on this topic can be found in the documentation on the Click2Go feature.

SWYN

You can activate sharing via social networks for each content paragraph. This feature can be configured from this tab.

Parameter	Description
General...	
Alignment	The links (symbols and text) and the introductory text are right-aligned by default.
Position	The links (symbols and text) and the introductory text are positioned at the bottom edge of the paragraph by default.
Default values...	
Title	This title is displayed in the user profile by default when the user shares the paragraph on a social network, provided that no other title has been indicated for the specific network (see below). A maximum of 50 characters are displayed.
Text	This text is displayed by default in the user profile when the user shares the paragraph on a social network, provided that no other text has been specified for the specific network (see below). A maximum of 250 characters are displayed.

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Parameter	Description
Image	This image is displayed by default in the user profile next to the text when the user shares the paragraph on a social network, provided that no other image has been specified for the specific network (see below). The maximum image size is 100 x 100 pixels. Larger images are scaled down to this size.
Facebook...	
Show	Select this check box to allow recipients to share the paragraph via their Facebook profile.
Title	This title is displayed when the recipient shares the paragraph on his or her Facebook profile. If you do not enter anything here, the standard title will be displayed. The maximum text length is 50 characters.
Text	This text is displayed when the recipient shares the paragraph on his or her Facebook profile. If you do not enter anything here, the standard text will be displayed. The maximum text length is 250 characters.
Image	This image is displayed when the recipient shares the paragraph on his or her Facebook profile. If you do not enter anything here, the standard image will be displayed. The maximum image size is 100 x 100 pixels. Larger images are scaled down to this size.
Redirect	By default, a landing page is created that displays the content of the linked paragraph. If you select this check box, the link will direct recipients to the URL specified in the **General** tab.
Twitter...	
Show	Select this option to allow recipients to share the paragraphs on their Twitter account.
Title	This title is displayed when the recipient shares the paragraph on his or her Twitter account. If you do not enter anything here, the standard title will be displayed. The maximum text length is 50 characters.
Redirect	By default, a landing page is created that displays the content of the linked paragraph. If you select this option, the link will direct recipients to the URL specified in the **General** tab.
MySpace...	
The parameters for MySpace are the same as those in the **Facebook** section.	
Xing...	
The parameters for Xing are the same as those in the **Twitter** section.	

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Options

You can give each content paragraph an appearance that is different from the general layout. To do so, use the layout configuration in this tab.

Parameter	Description
Layout...	
Width	The maximum available width is used by default. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value will be ignored.
Height	The paragraph is displayed over the entire available height by default, taking into account the content. Alternatively, you can specify a fixed height value here. If the content exceeds this height, the value will be ignored and the entire content displayed at the corresponding height.
Background color	Enter the hex code for the background color. Click on this field to open the color selector. You can enter any color value you like here. The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	You can specify different padding for each page. If the value is set to "0", then there will be no padding. The information is structured as follows: » one value, e.g. "10" sets the padding to the same value on all pages. » two values, e.g. "10 15" set the upper and lower padding to 10 pixels, right and left to 15 pixels. » four values, e.g. "20 10 0 10" set the upper padding to 20 pixels, the right and left padding to 10 pixels and no padding on the bottom.
Spacing between the articles	A space with this height is placed between the individual articles. By default, the first number in the Padding option is used. This option is only enabled when using the standard layout.
Layout	Set the general settings for the article layouts in the general settings. If there is no content available for the selected layout, the default layout is used.
Border...	
Show	Select this check box if you want to apply a border around the entire paragraph.
Border width	The border width is specified in pixels as a whole number. You can specify different border widths for each side. If the value is set to 0, then there will be no padding. The

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Parameter	Description
	information is structured as follows: » one value, e.g. "2" sets the border width to the same value on all pages. » two values, e.g. "2 4" set the upper and lower border width to 2 pixels, right and left to 4 pixels. » four values, e.g. "2 1 0 1" sets the upper border width to 2 pixels and 1 pixel on the left and right sides.
Color	Enter the hex code for the border color. Click on this field to open the color selector. You can enter any color value you like here. The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile...	
Width	Set the width of the paragraph in the mobile view here. The entire width is used by default. The widths of two consecutive paragraphs must be set in such a way that the two widths combine to make 100%. These two paragraphs will then be displayed next to one another in the mobile view. Otherwise, the two paragraphs will be displayed on top of one another with the specifically allocated width.
Table of contents...	
Show in table of contents	Select this check box to display the paragraph in the table of contents for the section.
Alternative table of contents entry	Enter the heading that you want to be displayed in the table of contents here. If you do not enter anything here, then the heading from the General tab will be displayed here.

Click profiles

Parameter	Description
Click profiles	Clicks on all of the links contained in the paragraph are allocated to the selected click profiles. Alternatively, you can allocate individual links to a click profile in the Tracking settings in the mailing creation wizard. You can create click profiles in the Click profiles menu item.

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Target groups

Parameter	Description
Target groups	If you only want the paragraph to be displayed to a certain recipient segment, select one or more target groups here. If you select multiple target groups, then only one of these target groups needs to apply (OR-linking). Target groups that filter a recipient segment can be created in the Target groups menu item.

HTML layouts

The content interface paragraph offers you a modern standard layout for formatting your offer texts and images. If you wish, up to 5 alternative custom layouts can be set up for you.

- To receive up to 5 alternative layouts customized to your products and services, contact the Episervercustomer support team, who will be happy to set up alternative layouts for you.
- If you have advanced HTML and CSS skills, you can set up alternative HTML layouts yourself. For more information, see the following page under the **Content interface** tab: General settings.

If you would like to create HTML layouts yourself, do not forget to set up alternative layouts for mobile and text versions as well. If no alternative layouts are saved for the mobile and text versions, the standard layout will automatically be used. In some circumstances, however, some of your text elements will not be in the order that you would like.

Sample standard layout

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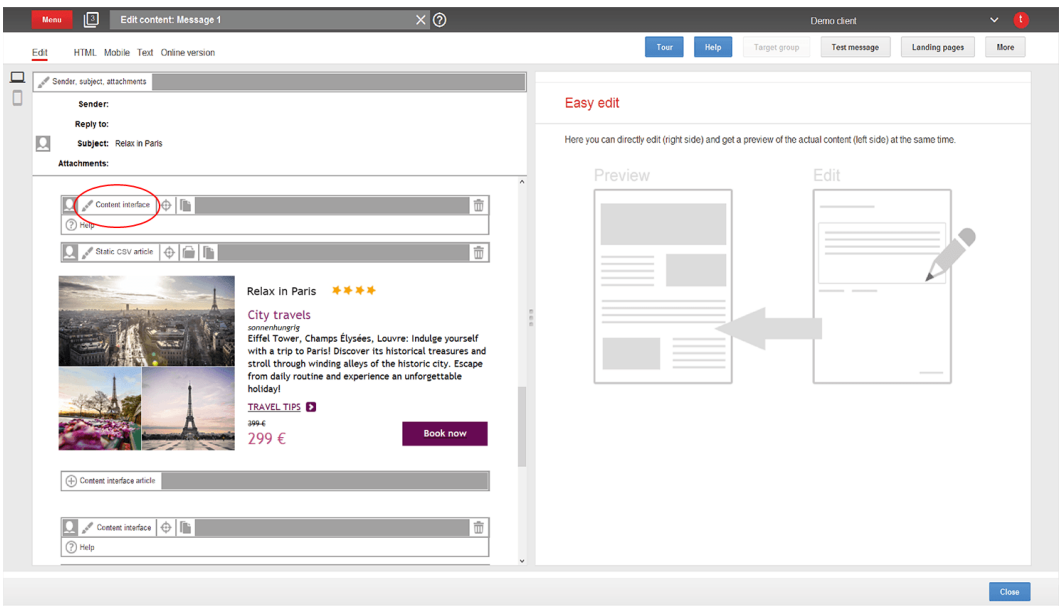
Sample alternative layout

Select layout

To select a standard layout or one of up to 5 alternative layouts, perform the following steps:

1. While editing a message in the Template Kit, on the left-hand side of the preview, on the content interface paragraph to which your product offer belongs, click … .



✔ The configuration window will open on the right-hand side.

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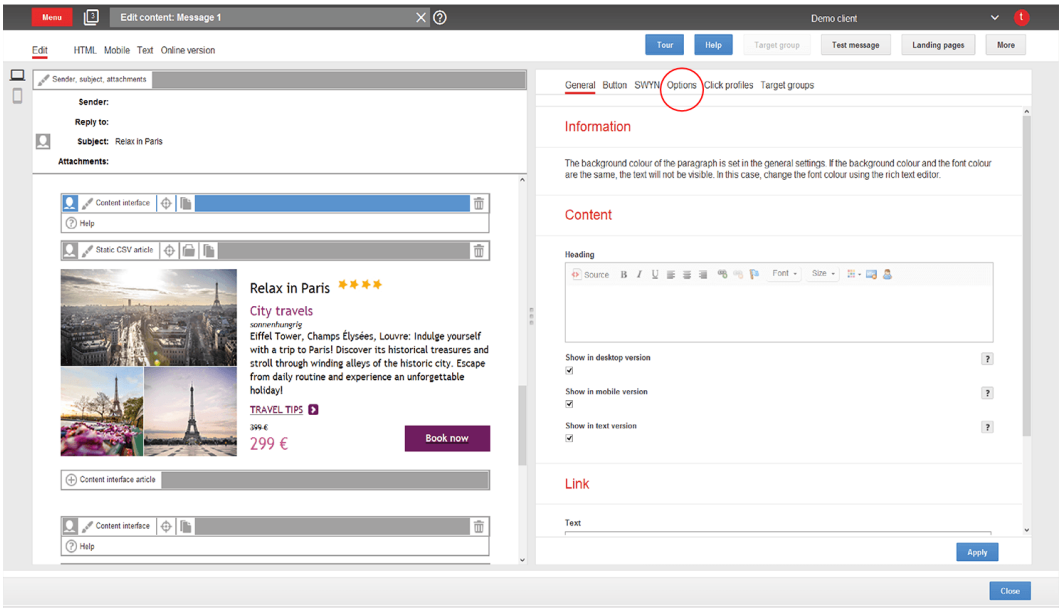
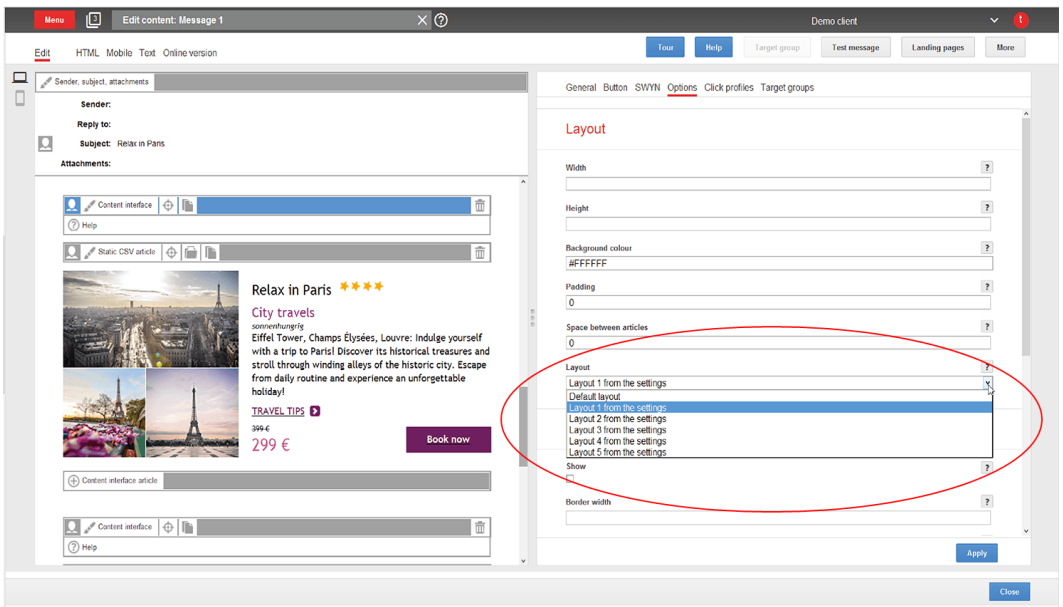
2. Switch to the **Options** tab.



3. Under the **Layout** item, select the layout that you would like to use from the menu.



4. Confirm your selection by clicking Apply.

✔ You have successfully applied the selected layout. On the left-hand side of the preview, the formatting of your product offer changes accordingly.

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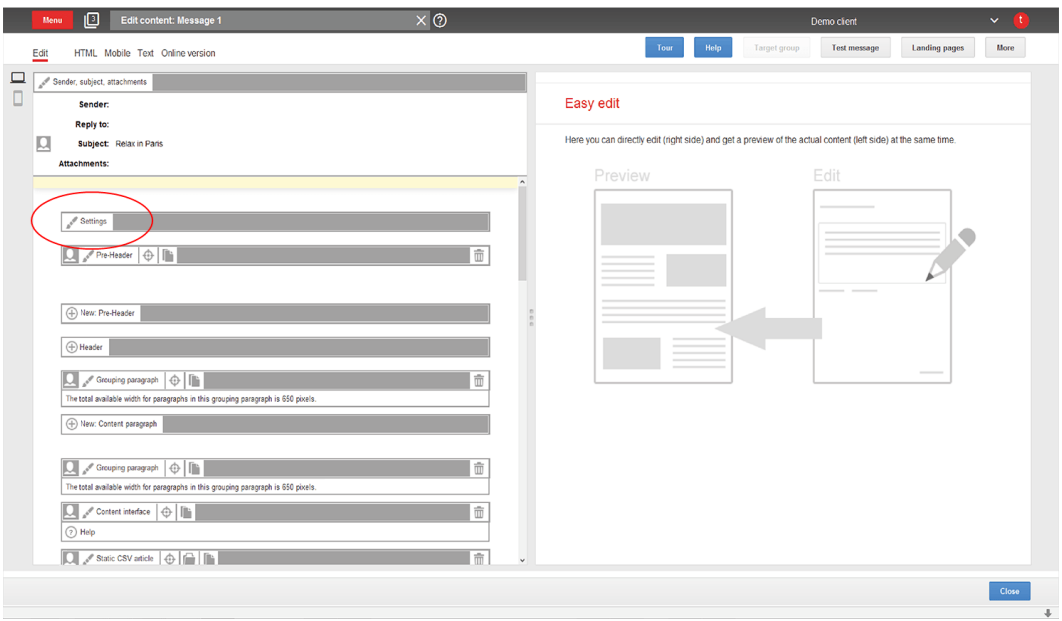
Edit layout

You can later edit your alternative layouts. The standard layout cannot be changed.

> If you later wish to edit your alternative layouts, you need to have advanced HTML and CSS skills. If you do not have advanced HTML and CSS skills, contact the Episerver customer support team, who will be happy to perform your desired changes for you. Editing the alternative layouts without advanced skills can lead to severe errors in the display of your messages.

Perform the following steps to edit your alternative layouts:

1. On the left-hand side of the preview, click Settings .



✔ The configuration window will open.

2. Switch to the **Content interface** tab.

✔ For each layout, there are source text fields for the desktop version, the mobile version, and the text version.

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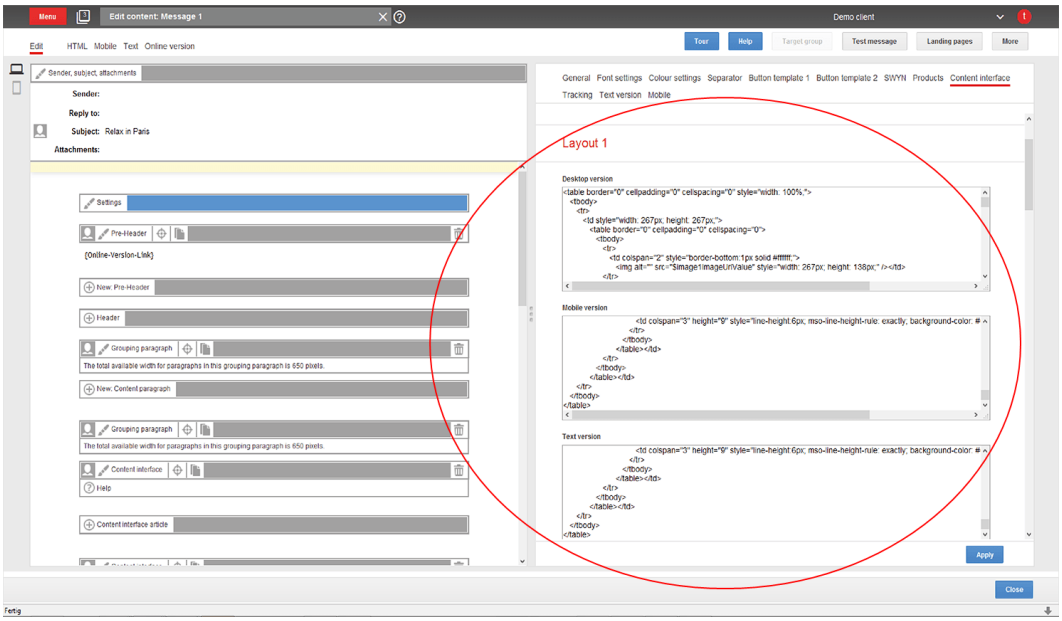

3. Edit the source text of the corresponding layout according to your wishes.

4. Confirm your changes by clicking on Apply.

✔ You have successfully edited your layout. On the left-hand side of the preview, the formatting of your product offer changes accordingly.

Troubleshooting CSV and XML

The following table lists the most common sources of errors that can arise while working with the content interface paragraphs.

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 the Episerver customer support team.

CSV troubleshooting

Problem	Possible cause	Resolution
Product data does not load or loads incorrectly	No semicolons were used as separators.	Change the separating characters in your CSV file to semicolons.

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Problem	Possible cause	Resolution
Product data does not load or loads incorrectly	Quotation marks in texts were not masked with an escape character and were erroneously interpreted as code.	Mask all quotation marks in texts with the escape character **"** (with an additional quotation mark for each quotation mark).
Product data was loaded incorrectly	The CSV file was not encoded as UTF-8 without BOM.	Encode the CSV file as UTF-8 without BOM or UTF-8.
Product data was loaded incorrectly	One or more HTML layouts contain incorrect source text.	Correct the source text of the corresponding HTML layout. If you do not have advanced HTML and CSS skills, contact the Episerver customer support team regarding the correction(s).
Product data is not loading	The CSV import was not or not yet performed.	Contact the Episerver customer support team so that they can review the CSV import.
Product data is not loading	The CSV file was saved in the wrong directory on the server.	Transfer the CSV file to the directory that you indicated when setting up the content interface.
Product data is not loading and a server error message appears.	The path for your CSV file is incorrect.	Contact Episerver customer support.
The content interface paragraph type is not available.	The feature has not been activated for you.	Contact Episerver customer support.
Components of a product offer are not being shown. For example, a product image is not displayed.	The source text of the HTML layout contains invalid code. For example, a tag was not closed.	Contact Episerver customer support. If you have advanced HTML and CSS skills, correct the source text.
Links are not being tracked	You have entered the link into a standard text field.	Enter the link in a link field. Links placed into a standard text field cannot be tracked.

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XML troubleshooting

Problem	Possible cause	Resolution
Product data is not loading	The product ID was entered incorrectly.	Enter the correct product ID.
Product data is not loading	The saved XML file has a file extension.	Remove the file extension.
Product data is not loading	The corresponding product offer no longer exists on your webspace or server.	Save the product offer again on your webspace or server.
Product data is not loading	The product data was saved in the wrong directory on the server or webspace.	Transfer the product data you are trying to load into the directory that you indicated when setting up the content interface.
Product data is not loading	The product ID is not positioned at the end of the URL.	Change your system configuration so that the product ID is positioned at the end of the URL. **Correct**: https://www.example.com/products/?id=123456789 **Incorrect**: https://www.example.com/products/?id=123456789?param1=XY?param2=abc

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Problem	Possible cause	Resolution
Some content is not loading. For example, the product image is missing.	Error in the XML code you generated.	Correct the XML code.
The content interface paragraph type is not available.	The feature has not been activated for you.	Contact Episerver customer support.
Components of a product offer are not being shown. For example, a product image is not displayed.	The source text of the HTML layout contains invalid code. For example, a tag was not closed.	Contact Episerver customer support. If you have advanced HTML and CSS skills, correct the source text.
Links are not being tracked	You have entered the link into a standard text field.	Enter the link in a link field. Links placed into a standard text field cannot be tracked.

Source code paragraph

You can enter HTML code in the source code paragraph. Note that email programs do not show HTML to the full extent and that code entered here may lead to a faulty layout in your mailing.

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Content interface

The source code paragraph has been prepared for the use of the content interface, which you can use to automatically fill in the content fields. You can receive more information from our customer support team.

Integrate a source code paragraph in a mailing

A source code paragraph can be integrated into a mailing in the following steps:

1. Create a new content paragraph of the **Source code** type.
2. Configure the source code paragraph.
3. If you have selected the content interface option: Load the contents.

Create a source code paragraph

To create a new content paragraph of the **Source code** type, perform the following steps:

→ 1. While editing the content of a mailing in the Template Kit, click `New: Content paragraph` .

You can also use the paragraph in the header and footer area. To create the paragraph in the header area, click `New: Header paragraph` . To create the paragraph in the footer area, click `New: Footer paragraph` .

✔ A window for selecting the paragraph type opens on the right-hand side.

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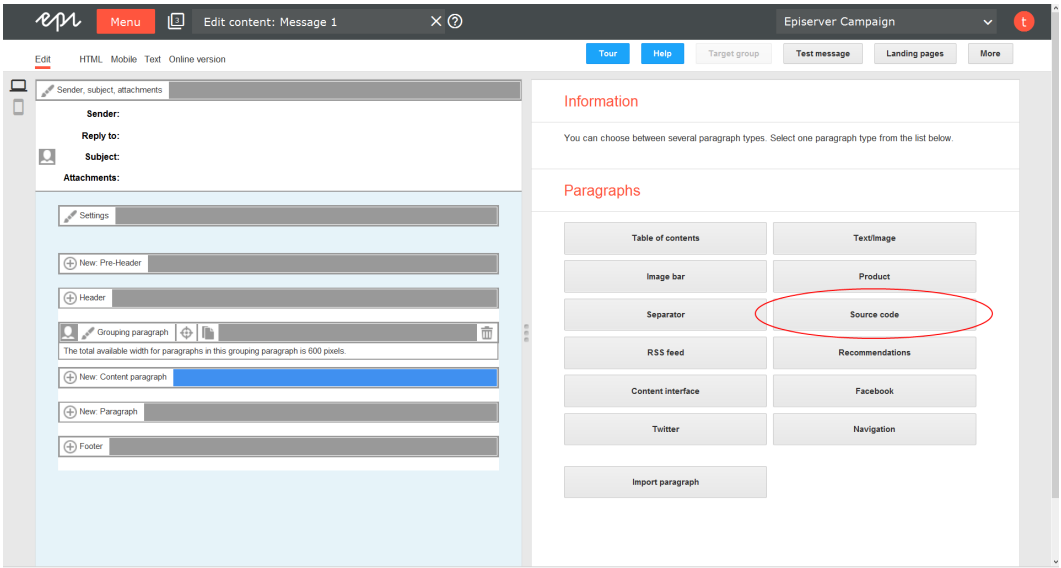
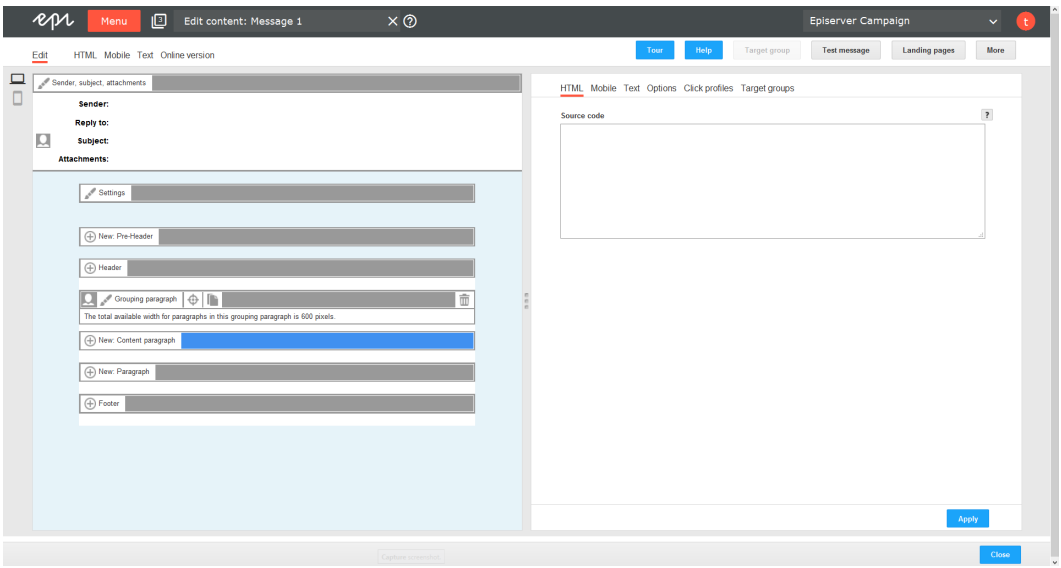
2. Click Source code.



✔ The configuration window for the selected paragraph type opens.



3. Click Apply.

✔ This creates a new **Source code** type content paragraph. The newly created source code paragraph will appear on the left side in the preview window.

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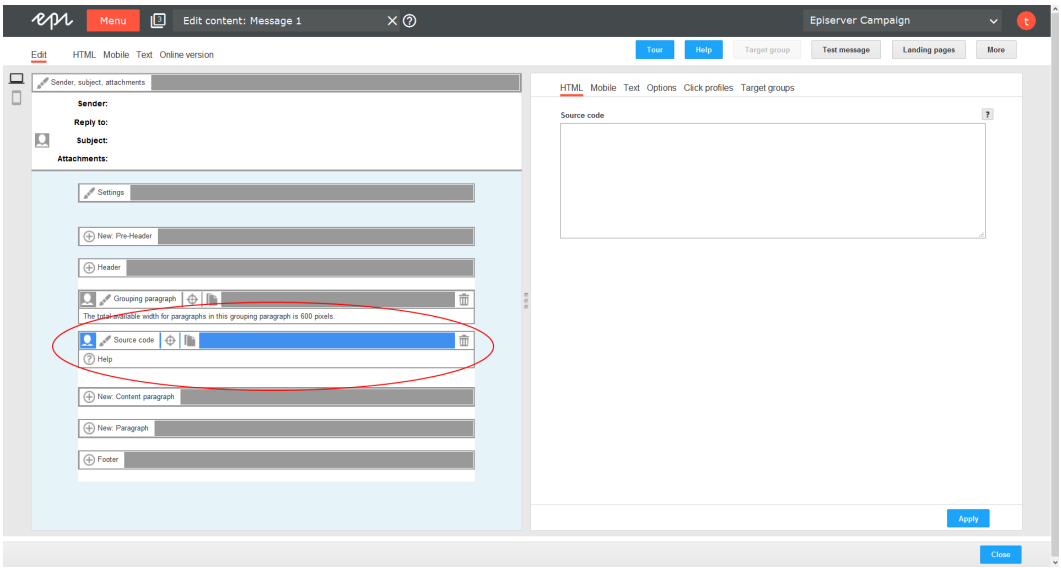

Configure a source code paragraph

To configure a source code paragraph, perform the following steps:

1. On the left side of the preview, in the menu bar of the source code paragraph, click Source code .

✔ The configuration window opens on the right-hand side.

2. For the setting options, see the following tables in the individual tabs. Change the settings as desired and confirm your entries by clicking Apply .

- HTML tab
- Mobile tab
- Text tab
- Options tab
- Click profiles tab
- Target groups tab

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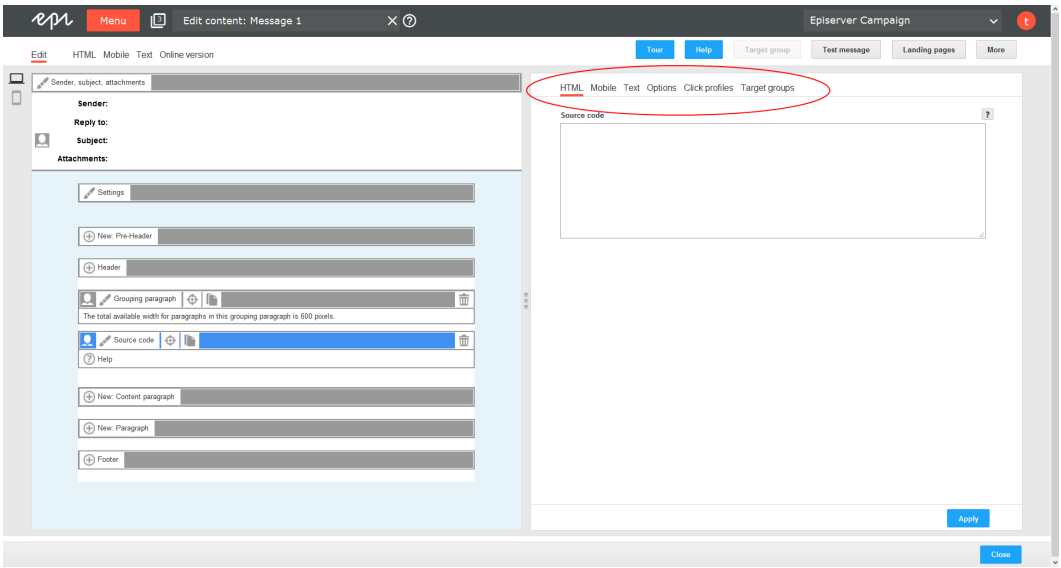

✔ You have successfully configured the source code paragraph.

HTML tab

Parameter	Description
Source code	You can enter a HTML source code here. The HTML declaration, meta and body tags must not be entered here.

Mobile tab

Parameter	Description
Source code	Here, you can enter an alternative source code for the mobile version of the mailing. The setting **Activate mobile version** in the general settings must be activated for this option to take effect. If the mobile version has been activated an you enter nothing here, the source code from the **HTML** tab will be used for the mobile version.

Text tab

Parameter	Description
Text	Enter the text for the text version of this paragraph. Be aware that in the text version no HTML or other formatting must be used. You can, however, insert line breaks and special characters as separator elements (e.g. ***** or ++++++).

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Options tab

You can define an individual layout, different from the general newsletter layout, for each content paragraph. All available layout options can be found in this tab.

Parameter	Description
Heading	If you want this paragraph to appear in the table of contents, but with a different entry (by default, the paragraph heading is shown in the table of contents), enter the text that should appear here.

Click profiles tab

Parameter	Description
Click profile	Clicks on any link in this paragraph are allocated to the selected click profiles. Refer to the Click profiles section if you want to create click profiles.

Target groups tab

Parameter	Description
Target group	If you want this paragraph only to be shown to a certain recipient segment, select one or more target groups here. If more than one target groups are selected, just one must match (OR logic). Refer to the Target groups section if you want to create target groups.

Loading contents via the content interface

If the content interface is activated for the source code paragraph in your client, you can provide the contents of the HTML, mobile, and text version in a CSV file and import them into the source code paragraph. The CSV format is fixed and cannot be changed.

Format the CSV file as follows:

```
id;name;html;mobile;text 1;Source code 1;<div class="html-version"
style="background-color: #ff0000;">HTML version</div>;"<div
class="mobile-version" style="background-color: #ff0000;">Mobile
version</div>";Text version
```

→ To integrate the content in the source code paragraph, click in the menu bar of the paragraph and select the desired content in the right column.

Hints

» The **id** and **name** columns are only used internally. Enter a name here so that you can identify the paragraph and select it in the editor.

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- The **html**, **mobile** and **text** columns can contain HTML source code that is added unchanged to the source code paragraph.
- All values need to be coded so that they are CSV-compliant.
- To format the contents, you must have profound knowledge of HTML, particularly HTML knowledge in the area of emails. The use of invalid or non-supported HTML code may lead to major display errors in the mailing.

Text or image paragraph

Use the text/image paragraph to add a text block and/or image in your mailing. You can freely select the position of the elements relative to one another.

Integrate a text/image paragraph in a mailing

A text/image paragraph is integrated in a mailing in 2 steps:

1. Create a new content paragraph of the **Text/image** type.
2. Configure the text/image paragraph.

Create a text/image paragraph

To create a new content paragraph of the **Text/image** type, perform the following steps:

→ 1. While editing the content of a mailing in the Template Kit, click `New: Content paragraph`.

You can also use the paragraph in the header and footer area. To create the paragraph in the header area, click `New: Header paragraph`. To create the paragraph in the footer area, click `New: Footer paragraph`.

✔ A window for selecting the paragraph type opens on the right-hand side.

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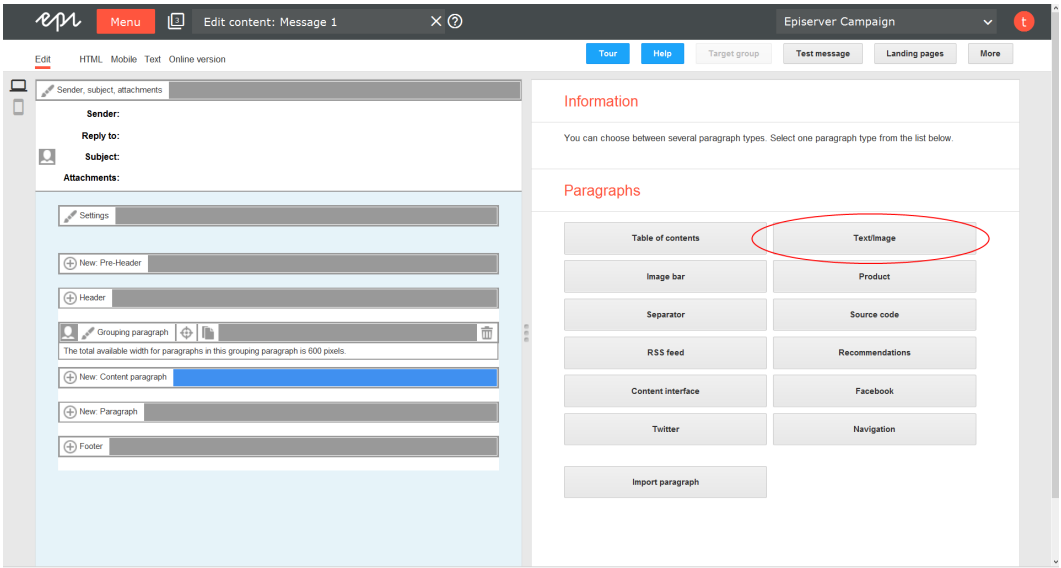
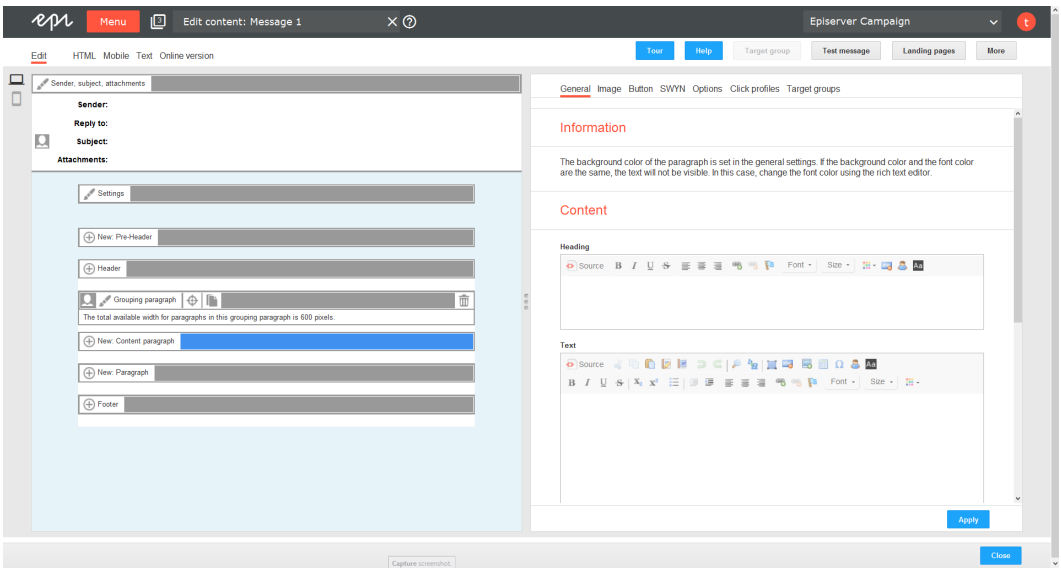
→ 2. Click Text/image.



✔ The configuration window for the selected paragraph type opens.



→ 3. Click Apply.

✔ This creates a new **Text/image** type content paragraph. The newly created text/image paragraph appears on the left side in the preview window.

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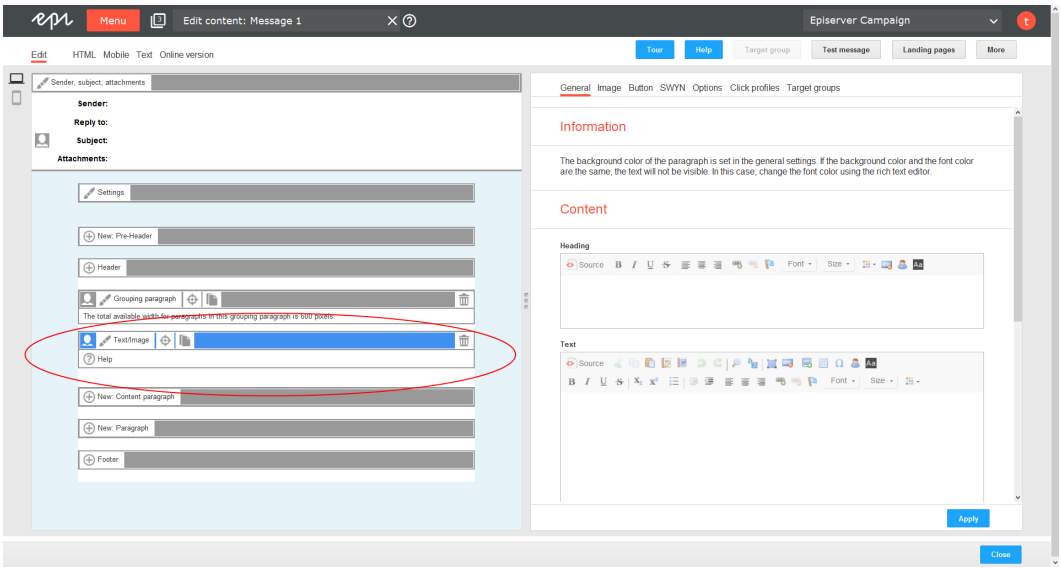

Configure a text/image paragraph

To configure a text/image paragraph, perform the following steps:

→ 1. On the left-hand side of the preview, in the menu bar of the text/image paragraph, click **Edit** .

✔ The configuration window opens on the right-hand side.

→ 2. For the setting options, see the following tables in the individual tabs. Change the settings as desired and confirm your entries by clicking Apply .

- General tab
- Image tab
- Button tab
- SWYN tab
- Options tab
- Click profiles tab
- Target groups tab

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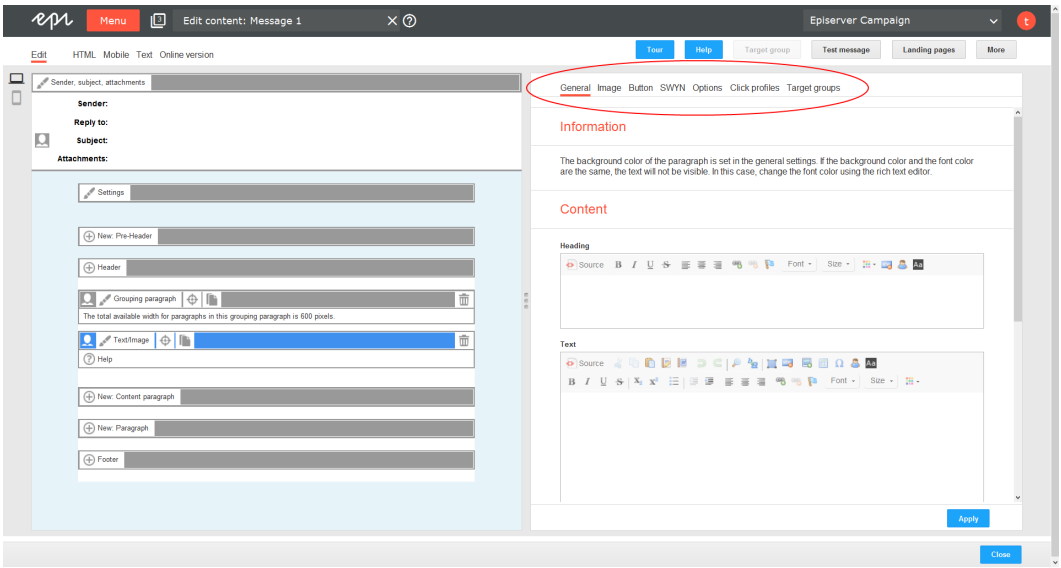

✔ You have successfully configured the text/image paragraph.

General tab

Parameter	Description
Content...	
Heading	Enter a heading for the paragraph here.
Text	Enter text using the Rich Text Editor here. You can use further formatting, for example insert breaks, create lists and tables and use other text decorations and colors. For all formatting purposes, use the tool bar of the Rich Text Editor.
Show in desktop version	Clearing this check box eliminates the paragraph from the desktop version. You should only clear this check box if you want the paragraph to appear only in the mobile version. If you do so, this check box and the **Activate mobile version** check box in the general settings must be selected.
Show in mobile version	By default, this paragraph is displayed in the mobile version. The **Activate mobile version** check box in general settings must be selected, otherwise selecting this check box has no effect.
Show in Text Version	Clear this check box if you do not want this paragraph to appear in the text version of the newsletter. This is suitable, for example, in image bar paragraphs, since images are not displayed in the text version. There, the alternative text is displayed instead.
Link...	

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Parameter	Description
Text	This text is linked to the URL entered below.
URL	Enter a target URL here, e.g. a landing page.
Alignment	Alignment can be right, left or centered.

Image tab

Parameter	Description
Image	Upload an image from your computer or enter an image URL in the **Alternative external URL** field that points to the image file.
Alternative text	This text is displayed, if a recipient has blocked or disabled the display of images in his/her email client, or if the image cannot be displayed for any other reason. We strongly recommend that you always enter an alternative text that may contain a short image description or title.
Link	You can link the image to a landing page or a page from your website. If you have entered a text link in this paragraph, we recommend that you use the same link for the image.
Subtitle	Enter an optional image subtitle here.
Position	You can place the image in a separate column next to heading and text block, or in a separate column next to the text block but below the heading. These positions are recommendable in most cases. If you use large images that run over the whole width of a paragraph or area, place them centered below the heading, below the text or below the link. If you select the **Below the heading right aligned** or **Below the heading left aligned** options, the text will float around the image.

Button tab

More information on this topic can be found in the documentation for the Click2Go function.

SWYN tab

You can enable the share function for social networks individually for each paragraph. Configure the SWYN function in this tab.

Parameter	Description
General...	
Alignment	By default, all links (icons and texts) as well as the introduction text are right aligned.

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Parameter	Description
Position	By default, all links (icons and texts) as well as the introduction text are placed at the bottom of the paragraph.
Default values...	
Title	By default, this title is shown in the profile of a social network, if a recipient shares this paragraph and if no other title has been defined for the specific network. The maximum length is 50 characters.
Text	By default, this text is shown in the profile of a social network, if a recipient shares this paragraph and if no other text has been defined for the specific network. The maximum length is 250 characters.
Image	By default, this image is shown in the profile of a social network, if a recipient shares this paragraph and if no other image has been defined for the specific network. The maximum image size is 100 x 100 pixels. Larger images are scaled down to this size.
Facebook...	
Show	Select this check box to enable sharing of this paragraph via Facebook for your recipients.
Title	This title is shown if a recipient shares the paragraph in his/her Facebook profile. If you do not enter a title here, the paragraph heading from the **General** tab is used. The maximum text length is 50 characters.
Text	This text is shown if a recipient shares the paragraph in his/her Facebook profile. If you do not enter a text here, the paragraph text from the **General** tab is used. The maximum text length is 250 characters.
Image	This image is shown next to the text if a recipient shares the paragraph in his/her Facebook profile. If you do not enter a text here, the image uploaded in the **Image** tab is used. The maximum size is 100 x 100 pixels. Larger images are scaled down automatically to this size.
Redirect	By default, a landing page with the content from this paragraph is created automatically and all posts in Facebook are linked to this landing page. If you select this check box, the posts are linked to the URL entered in the **General** tab.
Twitter...	
Show	Select this check box to enable sharing of this paragraph via Twitter for your recipients.
Title	This title is shown if a recipient shares the paragraph in his/her Twitter profile. If you do

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Parameter	Description
	not enter a title here, the paragraph heading from the tab **General** is used. The maximum text length is 50 characters.
Redirect	By default, a landing page is automatically created to which user who click the shared content in their networks are redirected. If you select this check box, the URL that has been entered in the tab **General** is used instead.
MySpace...	The parameters for MySpace are identical with those for Facebook.
Xing...	The parameters for Xing are identical with those for Twitter.

Options tab

You can define an individual layout, different from the general newsletter layout, for each content paragraph. All available layout options can be found in this tab.

Parameter	Description
Layout...	
Width	By default, the maximum available width is used. This value depends on the padding and the usage and width of the sidebar. Enter an integer value in pixels. If this value exceeds the maximum available width, it is ignored.
Height	By default, this paragraph is displayed with the maximum available height, taken into account the content of the paragraph. Alternatively, you may set a fixed value for the height. Should the content of the paragraph exceed this height, the value is ignored and the content displayed properly with the necessary height.
Background color	The background color must be entered as a hexadecimal value, preceded by the # character. click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Padding	You can define a different value for each side. The value 0 is used to set no padding at all. Use the following scheme to set the padding: » one value, e. g. "2" sets the same value to all four sides. » two values, e. g. "2 4" sets the top and bottom padding to 2 pixels, the left and right padding to 4 pixels. » four values, e. g. "2 1 0 1" sets the upper padding to 2 pixels, right padding to 1 pixels, no padding at the bottom and the left padding to 1 pixels.

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Parameter	Description
Border...	
Show	Select this check box if you want to display a frame around the whole paragraph.
Border width	The border width is set as an integer value in pixels. You can define a different value for each side. The value 0 is used to show no border at all. Use the following scheme to set the border width: » one value, e. g. "2" sets the same value to all four sides. » two values, e. g. "2 4" sets the top and bottom border to 2 pixels, the left and right border to 4 pixels. » four values, e. g. "2 1 0 1" sets the upper border to 2 pixels, right border to 1 pixels, no border at the bottom and the left border to 1 pixels.
Color	The border color must be entered as a hexadecimal value, preceded by the # character. Click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Mobile...	
Width	Set the width (in percent) of the paragraph in the mobile version here. By default, the width is set to 100%. Be aware that you must set the width of two consecutive paragraphs, so that the width of both adds to 100%. Otherwise, these paragraphs are displayed one below the other in the mobile version, each with the respective width.
Table of contents...	
Show in table of contents	By default, all content paragraphs create an automatic entry in the table of contents paragraph. If you do not want this paragraph to appear in the table of contents, clear this check box.
Alternative table of contents entry	If you want this paragraph to appear in the table of contents, but with a different entry (by default, the paragraph heading is shown in the table of contents), enter the text that should appear here.

Click profiles tab

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. Alternatively you may assign click profiles to individual links in the **Tracking** options when editing a mailing. See the Click profiles section if you want to create click profiles.

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Parameter	Description

Target groups tab

Parameter	Description
Target groups	If you want this paragraph to be shown only to a certain recipient segment, select one or more target groups here. If more than one target groups are selected, just one must match (OR logic). See the Target groups section if you want to create target groups.

Table of contents paragraph

Use the table of content paragraph to create a table of contents for your mailing. You can control the display of individual contents in the table of contents simply by including certain areas or excluding individual areas:

- List all paragraphs instead of the header and footer
- List all paragraphs including the header, except for the footer
- List all paragraphs including the footer, except for the header
- List all paragraphs including the header and footer
- Only list the paragraphs of a grouping paragraph

To specifically exclude individual content paragraphs from the display in the table of contents, edit the corresponding content paragraph. In the configuration window of the content paragraph, change to the **Options** tab > **Table of contents** and enter the desired setting.

Integrate a table of contents paragraph in a mailing

A table of contents paragraph is integrated in a mailing in 2 steps:

1. Create a new content paragraph of the **Table of contents** type.
2. Configure the table of contents paragraph.

Create a table of contents paragraph

To create a new content paragraph of the **Table of contents** type, perform the following steps:

1. While editing the content of a mailing in the Template Kit, click `New: Content paragraph` .

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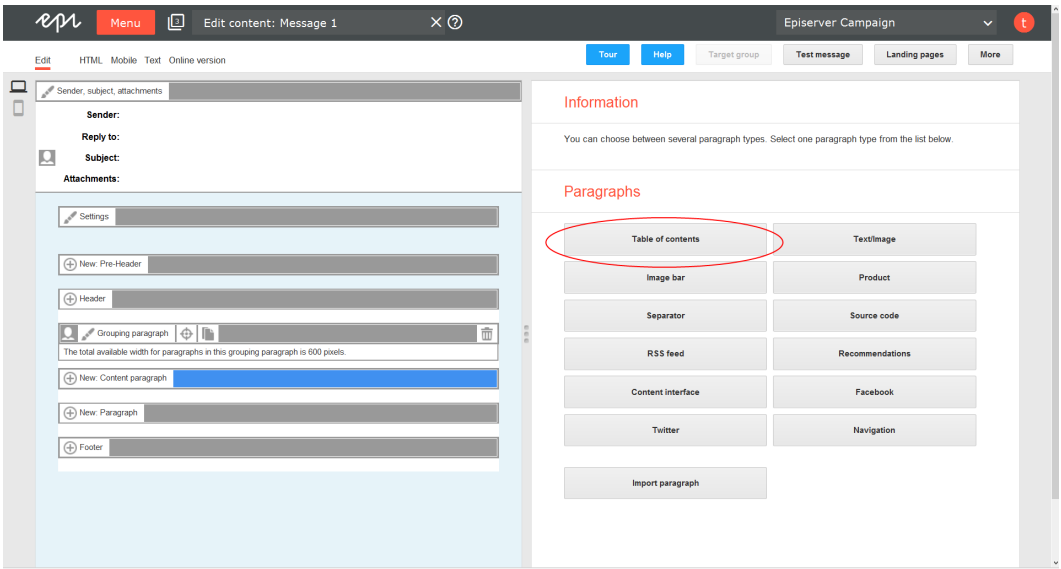
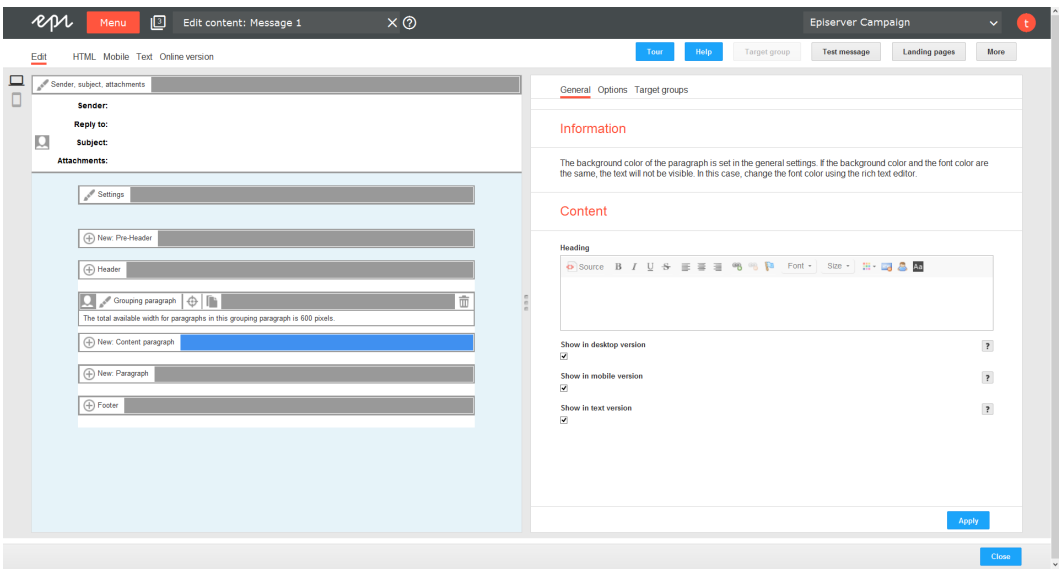
You can also use the paragraph in the header and footer area. To create the paragraph in the header area, click **New: Header paragraph**. To create the paragraph in the footer area, click **New: Footer paragraph**.

✔ A window for selecting the paragraph type opens on the right-hand side.

→ 2. Click **Table of contents**.



✔ The configuration window for the selected paragraph type opens.



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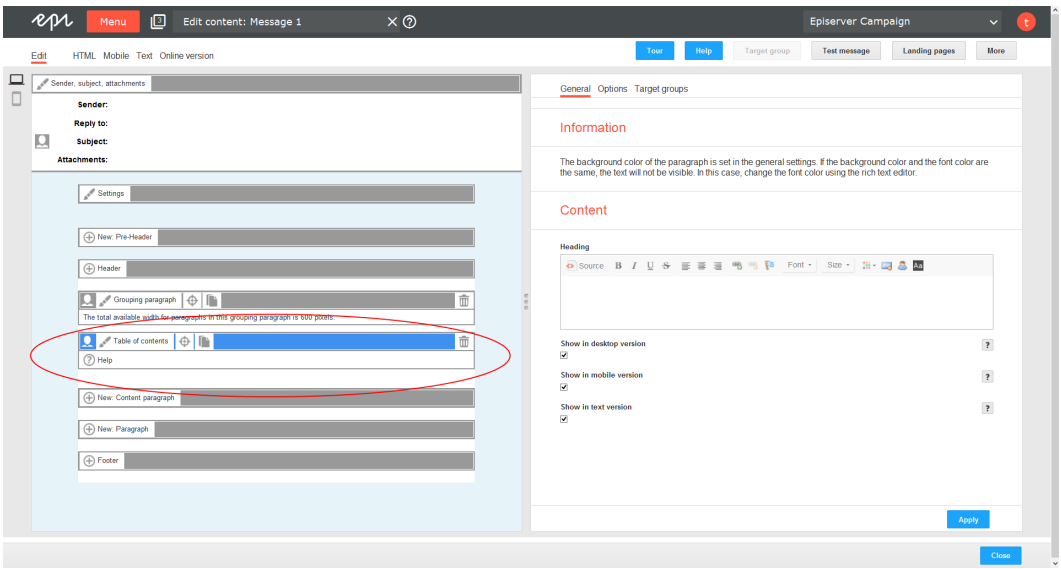
→ 3. Click Apply.

✔ This creates a new **Table of contents** type content paragraph. The newly created table of contents paragraph appears on the left side in the preview window.



Configure a table of contents paragraph

To configure a table of contents paragraph, perform the following steps:

→ 1. On the left-hand side of the preview, in the menu bar of the table of contents paragraph, click Table of contents.

✔ The configuration window opens on the right-hand side.

→ 2. For the setting options, see the following tables in the individual tabs. Change the settings as desired and confirm your entries by clicking Apply.

- General tab
- Options tab
- Target groups tab

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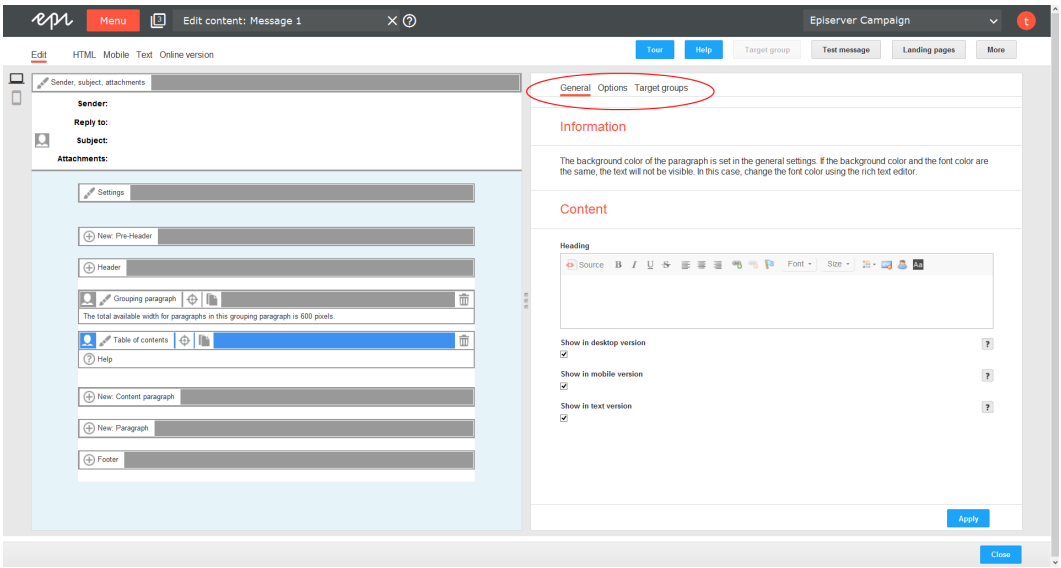

✔ You have successfully configured the table of contents paragraph.

General tab

Parameter	Description
Content...	
Heading	Enter a title for the table of contents.
Show in desktop version	Select this check box to include this paragraph in the desktop version of the mailing.
Show in mobile version	Select this check box to include this paragraph in the mobile version of the mailing. The setting **Activate mobile version** in the general settings must be activated for this option to take effect. If you disabled the mobile version, this option has no function.
Show in text version	Select this check box to include this paragraph in the text version of the mailing.

Options tab

You can define an individual layout for the table of contents. All available layout options can be found in this tab.

Parameter	Description
Layout...	

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Parameter	Description
Width	By default, the maximum available width is used. This value depends on the padding and the usage and width of the sidebar. Enter an integer value in pixels. If this value exceeds the maximum available width, it will be ignored.
Height	By default, this paragraph is displayed with the maximum available height, taken into account the content of the paragraph. Alternatively, you may set a fixed value for the height. Should the content of the paragraph exceed this height, the value is ignored and the content displayed properly with the necessary height.
Area	Select the paragraph areas to be included in the table of contents.
Background color	The background color must be entered as a hexadecimal value, preceded by the # character. Click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Padding	You can define a different value for each side. The value 0 is used to set no padding at all. Use the following scheme to set the padding: » one value, e. g. "2" sets the same value to all four sides. » two values, e. g. "2 4" sets the top and bottom padding to 2 pixels, the left and right padding to 4 pixels. » four values, e. g. "2 1 0 1" sets the upper padding to 2 pixels, right padding to 1 pixel, no padding at the bottom and the left padding to 1 pixel.
Border...	
Show	Select this check box if you want to display a frame around the whole paragraph.
Border width	The border width is set as an integer value in pixels. You can define a different value for each side. The value 0 is used to show no border at all. Use the following scheme to set the border width: » one value, e. g. "2" sets the same value to all four sides. » two values, e. g. "2 4" sets the top and bottom border to 2 pixels, the left and right border to 4 pixels. » four values, e. g. "2 1 0 1" sets the upper border to 2 pixels, right border to 1 pixel, no border at the bottom and the left border to 1 pixel.
Color	The border color must be entered as a hexadecimal value, preceded by the # character. Click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-

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Parameter	Description
	conformal colors may vary, depending on the browser or email client of the recipient.
Mobile...	
Width	Set the width (in percent) of the paragraph in the mobile version here. By default, the width is set to 100%. Be aware that you must set the width of two consecutive paragraphs, so that the width of both adds to 100%. Otherwise, these paragraphs will be displayed one below the other in the mobile version, each with the respective width.
Lists...	
List type	You can layout the table of contents in a default CSS style, use a custom label or no label at all.
Custom list item label	If you want to use a custom list item label, upload a graphic here. The maximum width is 30 pixels. Larger images will be scaled down to this size.

Target groups tab

Parameter	Description
Target groups	If you want this paragraph only to be shown to a certain recipient segment, select one or more target groups here. If more than one target groups are selected, just one must match (OR logic). See the Target groups section if you want to create target groups.

Image bar paragraph

Use the image bar paragraph to create a horizontal or vertical image bar. You can specify up to ten images for an image bar. The uploaded images are automatically scaled and adapted to the available width.

Integrate an image bar paragraph in a mailing

An image bar paragraph is integrated in a mailing in 2 steps:

1. Create a new content paragraph of the **Image bar** type.
2. Configure the image bar paragraph.

Create an image bar paragraph

To create a new content paragraph of the **Image bar** type, perform the following steps:

→ 1. While editing the content of a mailing in the Template Kit, click `New: Content paragraph` .

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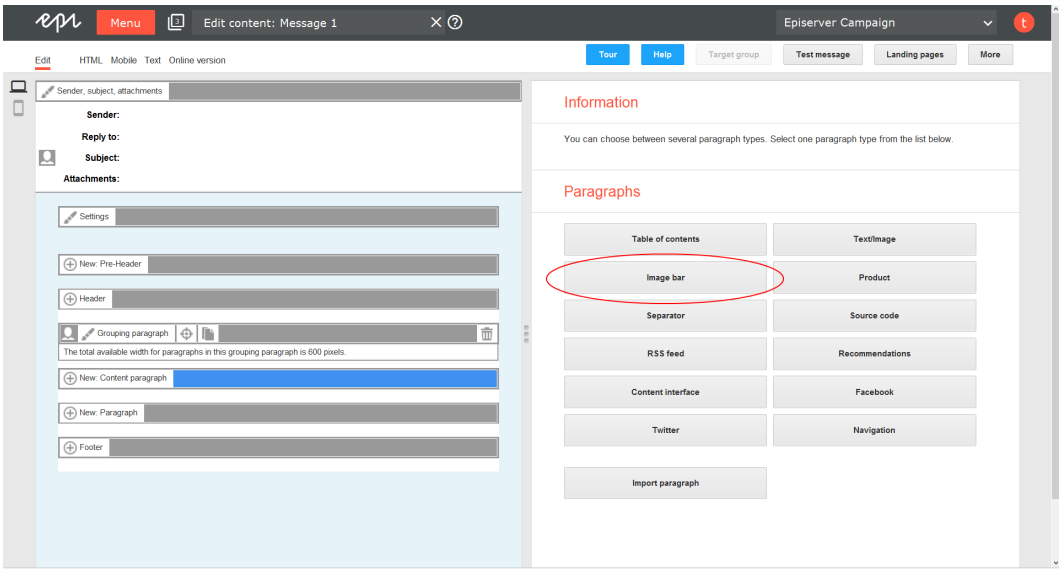
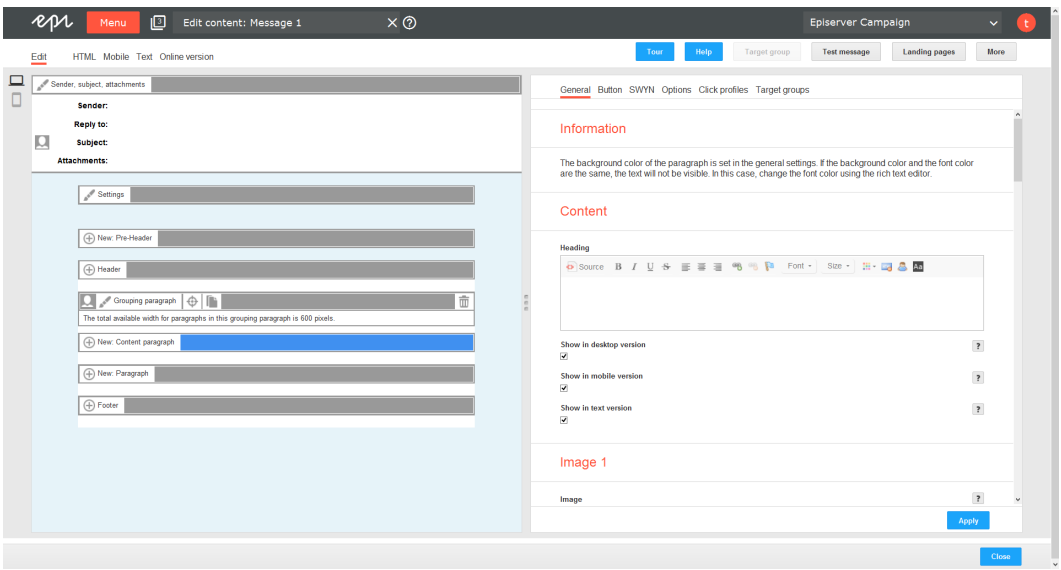
You can also use the paragraph in the header and footer area. To create the paragraph in the header area, click **New: Header paragraph**. To create the paragraph in the footer area, click **New: Footer paragraph**.

✔ A window for selecting the paragraph type opens on the right-hand side.

→ 2. Click **Image bar**.



✔ The configuration window for the selected paragraph type opens.



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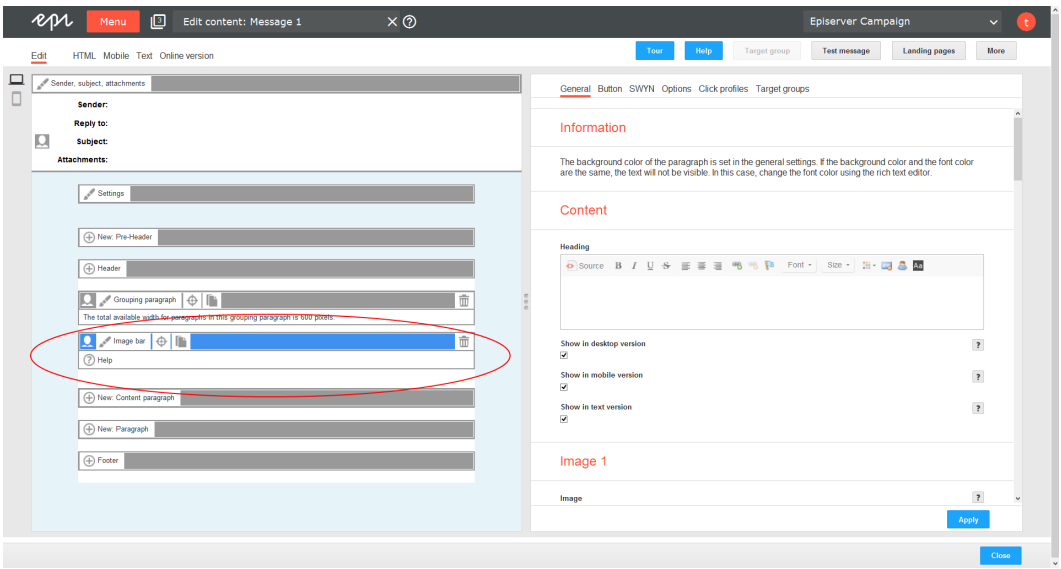
→ 3. Click Apply.

✔ This creates a new **Image bar** type content paragraph. The newly created image bar paragraph appears on the left side in the preview window.



Configure an image bar paragraph

To configure an image bar paragraph, perform the following steps:

→ 1. On the left side of the preview, in the menu bar of the image bar paragraph, click Image bar.

✔ The configuration window opens on the right-hand side.

→ 2. For the setting options, see the following tables in the individual tabs. Change the settings as desired and confirm your entries by clicking Apply.

- General tab
- Button tab
- SWYN tab
- Options tab
- Click profiles tab
- Target groups tab

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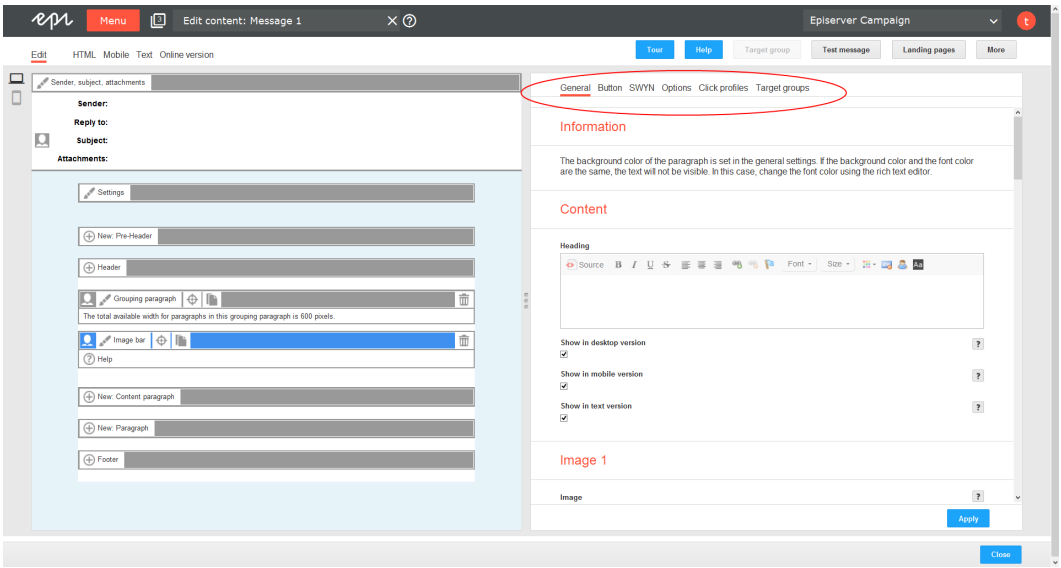

✔ You have successfully configured the image bar paragraph.

General tab

Parameter	Description
Content...	
Heading	Enter a heading for this paragraph here.
Show in desktop version	Select this check box to include this paragraph in the desktop version of the mailing.
Show in mobile version	Select this check box to include this paragraph in the mobile version of the mailing. The setting **Activate mobile version** in the general settings must be activated for this option to take effect. If you disabled the mobile version, this option has no function.
Show in text Version	Select this check box to include this paragraph in the text version of the mailing.
Image 1...10	
Image	Upload an image from your computer or enter an image URL in the field **Alternatively external URL** that points to the image file.
Alternative text	This text is displayed, if a recipient has blocked or disabled the display of images in the email client, or if the image cannot be displayed for any other reason.

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Parameter	Description
	We strongly recommend that you always enter an alternative text that may contain a short image description or title.
Link	You can link the image to a landing page or a page from your website. If you have entered a text link in this paragraph, we recommend that you use the same link for the image.

Button tab

More information on this topic can be found in the documentation for the Click2Go function.

SWYN tab

Parameter	Description
General...	
Alignment	By default, links (icons and texts) as well as the introduction text are right aligned.
Position	By default, links (icons and texts) as well as the introduction text are placed at the bottom of the paragraph.
Default values...	
Title	By default, this title is shown in the profile of a social network if a recipient shares this paragraph and if no other title has been defined for the specific network. The maximum length is 50 characters.
Text	By default, this text is shown in the profile of a social network if a recipient shares this paragraph and if no other text has been defined for the specific network. The maximum length is 250 characters.
Image	By default, this image is shown in the profile of a social network if a recipient shares this paragraph and if no other image has been defined for the specific network. The maximum image size is 100x100 pixels. Larger images are scaled down to this size.
Facebook...	
Show	Select this check box to enable sharing of this paragraph via Facebook for your recipients.
Title	This title is shown if a recipient shares the paragraph in his/her Facebook profile. If you

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Parameter	Description
	do not enter a title here, the paragraph heading from the tab **General** will be used. The maximum text length is 50 characters.
Text	This text will be shown if a recipient shares the paragraph in his/her Facebook profile. If you do not enter a text here, the paragraph text from the tab **General** is used. The maximum text length is 250 characters.
Image	This image is shown next to the text if a recipient shares the paragraph in his/her Facebook profile. If you do not enter a text here, the image uploaded in the **Image** tab is used. The maximum size is 100 x 100 pixels. Larger images are scaled down automatically to this size.
Twitter...	
Show	Activate this option to enable sharing of this paragraph via Twitter for your recipients.
Title	This title is shown if a recipient shares the paragraph in his/her Twitter profile. If you do not enter a title here, the paragraph heading from the tab **General** is used. The maximum text length is 50 characters.
MySpace...	Parameters for MySpace are identical with those for Facebook.
Xing...	Parameters for Xing are identical with those for Twitter.

Options tab

You can define an individual layout, different from the general newsletter layout, for each content paragraph. All available layout options can be found in this tab.

Parameter	Description
Layout...	
Width	By default, the maximum available width is used. This value depends on the padding and the usage and width of the sidebar. Enter an integer value in pixels. If this value exceeds the maximum available width, it will be ignored.
Height	By default, this paragraph is displayed with the maximum available height, taken into account the content of the paragraph. Alternatively, you may set a fixed value for the height. Should the content of the paragraph exceed this height, the value is ignored and the content displayed properly with the necessary height.
Separation space	Define the gap between each image, vertically or horizontally, according to the arrangement.

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Parameter	Description
Arrangement	Alternatively, the image bar can be laid out vertically.
Background color	The background color must be entered as a hexadecimal value, preceded by the # character. Click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Padding	You can define a different value for each side. The value 0 is used to set no padding at all. Use the following scheme to set the padding: » one value, e. g. "2" sets the same value to all four sides. » two values, e. g. "2 4" sets the top and bottom padding to 2 pixels, the left and right padding to 4 pixels. » four values, e. g. "2 1 0 1" sets the upper padding to 2 pixels, right padding to 1 pixel, no padding at the bottom and the left padding to 1 pixel.
Border...	
Show	Select this check box if you want to display a frame around the whole paragraph.
Border width	The border width is set as an integer value in pixels. You can define a different value for each side. The value 0 is used to show no border at all. Use the following scheme to set the border width: » one value, e. g. "2" sets the same value to all four sides. » two values, e. g. "2 4" sets the top and bottom border to 2 pixels, the left and right border to 4 pixels. » four values, e. g. "2 1 0 1" sets the upper border to 2 pixels, right border to 1 pixel, no border at the bottom and the left border to 1 pixel.
Color	The border color must be entered as a hexadecimal value, preceded by the # character. Click the green triangle to open a list with default web colors and the corresponding hexadecimal codes. You may use any other color/color code. The display of non-conformal colors may vary, depending on the browser or email client of the recipient.
Mobile...	
Width	Set the width (in percent) of the paragraph in the mobile version here. By default, the width is set to 100%. Be aware that you must set the width of two consecutive paragraphs, so that the width of both adds to 100%. Otherwise, these paragraphs will be displayed one below the other in the mobile version, each with the respective

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Parameter	Description
	width.
Separation space	By default, the heading of the paragraph set in the **General** tab is shown in the table of contents. You can enter an alternative heading that is shown in the table of contents.
Table of contents...	
Show in table of contents	By default, all content paragraphs create an automatic entry in the table of contents paragraph. If you do not want this paragraph to appear in the table of contents, clear this check box.
Alternative table of contents entry	If you want this paragraph to appear in the table of contents, but with a different entry (by default, the paragraph heading is shown in the table of contents), enter the text that should appear here.

Click profiles tab

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See the Click profiles section if you want to create click profiles.

Target groups tab

Parameter	Description
Target groups	If you want this paragraph only to be shown to a certain recipient segment, select one or more target groups here. If more than one target groups are selected, just one must match (OR logic). See the Target groups section if you want to create target groups.

Separator paragraph

You can use the separator paragraph either at the main level for visually separating multiple grouping paragraphs or at the second level for separating content paragraphs.

Insert a separator paragraph

Insert a separator paragraph in a mailing according to the following steps:

1. Create a new paragraph of the **Separator** type.
2. Configure the separator paragraph.

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Create a separator paragraph

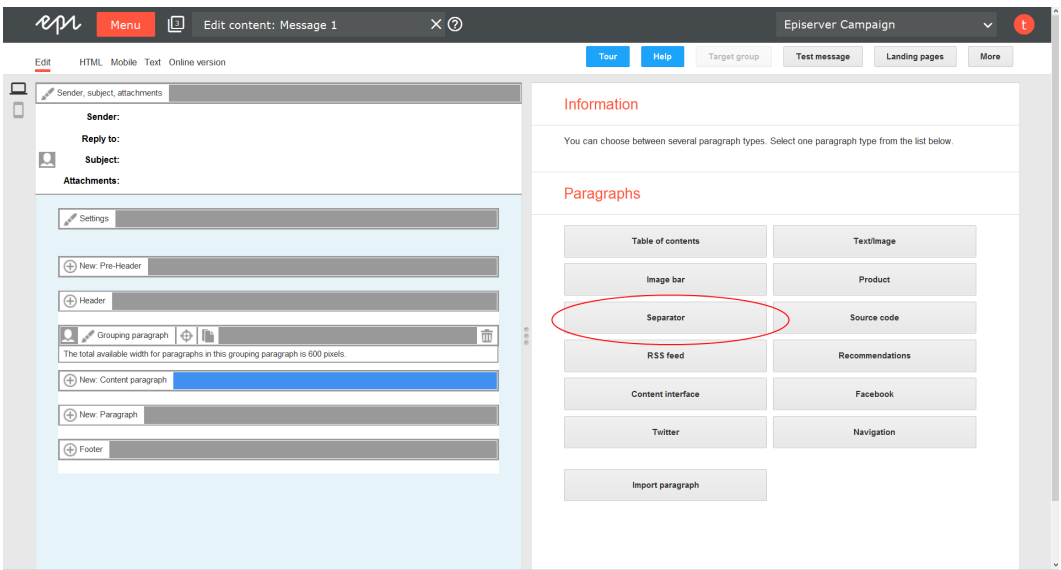
To create a new content paragraph of the **Separator** type, perform the following steps:

1. To insert a separator paragraph at the main level when editing the content of a mailing in the Template Kit, click `New: Paragraph`. To insert a separator paragraph after a content paragraph, click `New: Content paragraph`.

> You can also use the paragraph in the header and footer area. To create the paragraph in the header area, click `New: Header paragraph`. To create the paragraph in the footer area, click `New: Footer paragraph`.

✔ A window for selecting the paragraph type opens on the right-hand side.

2. Click `Separator`.



✔ The configuration window for the selected paragraph type opens.

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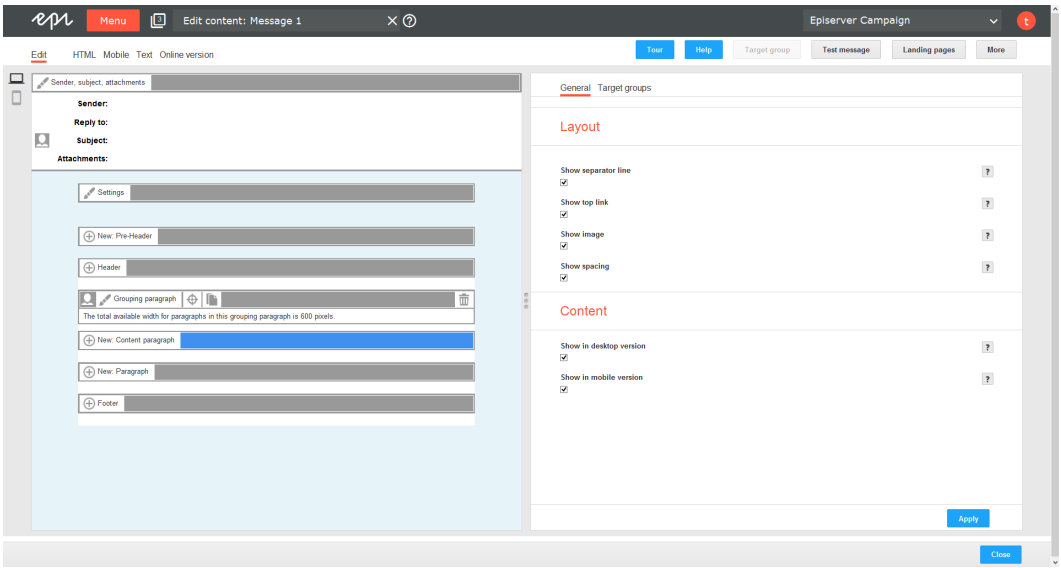
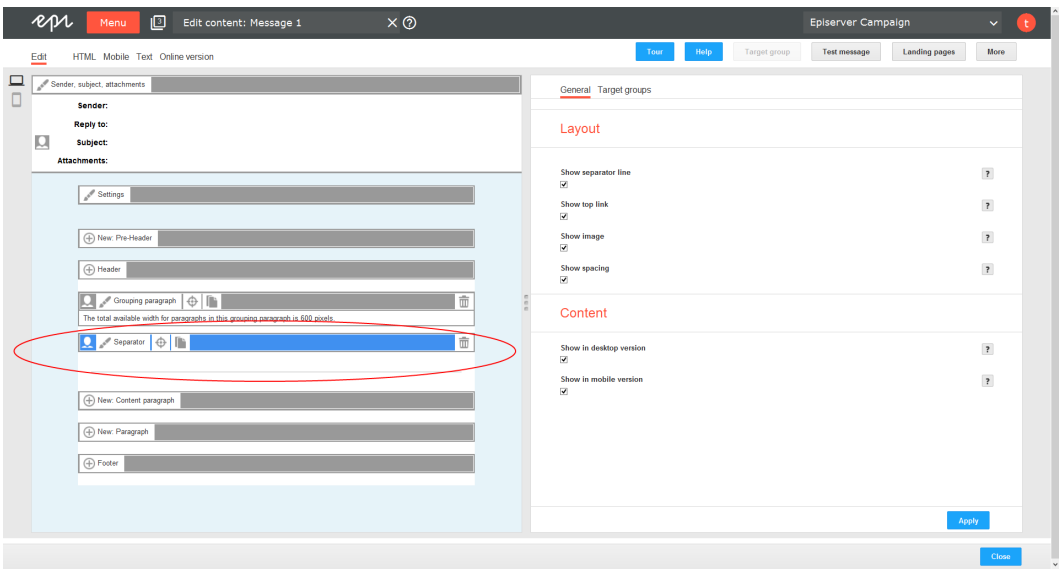


→ 3. Click Apply .

✔ This creates a new **Separator** type paragraph. The newly created separator paragraph appears on the left side in the preview window.



Configure a separator paragraph

To configure a separator paragraph, perform the following steps:

→ 1. On the left-hand side of the preview, in the menu bar of the separator paragraph, click Separator .

✔ The configuration window opens on the right-hand side.

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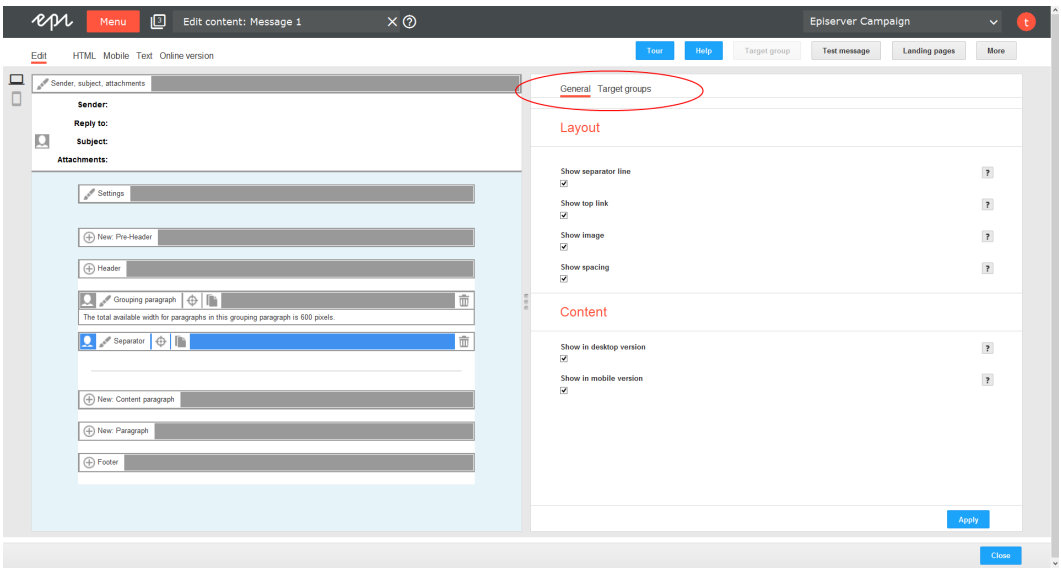
2. For the setting options, see the following tables in the individual tabs. Change the settings as desired and confirm your entries by clicking Apply.

- General tab
- Target groups tab



✔ You have successfully configured the separator paragraph.

General tab

Parameter	Description
Layout...	
Show separator line	The layout of the horizontal line can be defined in the general settings.
Show top link	The layout of the top link can be defined in the general settings.
Show image	You can upload a custom top link icon in the general settings.
Show spacing	The spacing above and below the horizontal line, as well as above and below the top link can be defined in the general settings.
Content...	
Show in	Select this check box to include this paragraph in the desktop version of the mailing.

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Parameter	Description
desktop version	
Show in mobile version	Select this check box to include this paragraph in the mobile version of the mailing. The setting Activate mobile version in the general settings must be activated for this option to take effect. If you disabled the mobile version, this option has no function.

Target groups tab

To give you the highest flexibility when creating targeted contents for recipient segments, separator paragraphs can be assigned to a target group. This avoids, for example, that two separators appear in a newsletter where one targeted paragraph was been removed because a recipient does not match the respective target group. Always test the newsletter layout for all target groups using the action button **Target group** at the upper right of the window.

Parameter	Description
Target groups	If you want the separator only to be shown to a certain recipient segment, select one or more target groups here. If more than one target groups are selected, just one must match (OR logic). See the Target groups section if you want to create target groups.

RSS feed paragraph

An RSS feed is used to publish information in a standardized format, effectively providing a type of interface for third-party providers. The Template Kit is able to access this interface and incorporate the content into your newsletters. It allows you to edit texts or re-position content even after they have been retrieved and, therefore, serves primarily as a tool to help you in supplying content.

The Template Kit may contain any number of RSS feed paragraphs, each of which accesses a different RSS feed.

An RSS feed paragraph can be used in both the header and footer spaces as well as in the structural paragraphs. In addition, a supplementary tab is activated in the General settings of the Template Kit, where content order is set in standard layout. Various alternative layouts can be defined by entering HTML/text. These alternate layouts may be assigned via the **Options** tab.

Set up an RSS feed paragraph

➜ To set up the RSS feed paragraph, contact our customer support team who will be happy to enable this feature for you.

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Format of the RSS feed

In order for the RSS feed to be processed correctly, it must meet certain requirements. The format is based on the RSS 2.0 specification, which means that all RSS feeds that also comply with this specification can be processed. The required information for the channel node is not processed by the Template Kit, but it must still be available. Only the subnodes of the item node are used.

```
<?xml version="1.0"?>
<rss version="2.0">
  <channel>
        <title>RSS Feed</title>
        <link>http://www.example.com/</link>
        <description>Text</description>
        <item>
            <title>Title 1</title>
            <description>Text</description>
            <enclosure url="http://www.example.com/image2.png"
length="12345" type="image/png" />
            <link>http://www.example.com/title1</link>
           <comments>http://www.example.com/title1/comments</comments>
            <category>News</category>
            <author>author@example.com</author>
            <pubDate>Sun, 19 May 2002 15:21:36 GMT</pubDate>
        </item>
        <item>
            <title>Title 2</title>
            <description>Text</description>
            <enclosure url="http://www.example.com/image2.png"
length="23456" type="image/png" />
            <link>http://www.example.com/title2</link>
            <comments>http://www.example.com/title2/comments</comments>
            <category>News</category>
            <author>author@example.com</author>
            <pubDate>Sun, 19 May 2002 15:21:36 GMT</pubDate>
        </item>
    </channel>
</rss>
```

Integrate an RSS feed into a mailing

The RSS feed can be integrated into a mailing in 4 steps:

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1. Create a new RSS feed paragraph
2. Configure the RSS feed paragraph
3. Retrieve the RSS feed and load the desired RSS feed items into the mailing
4. Edit the loaded RSS feed items if needed

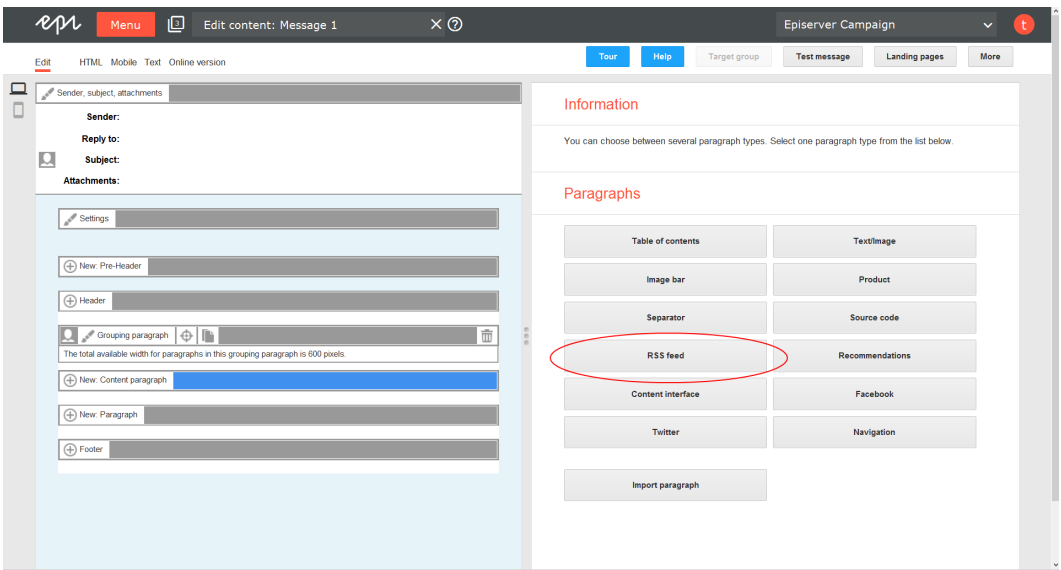
Create an RSS feed paragraph

To create a new RSS feed paragraph, perform the following steps.

→ 1. While editing the content of a mailing in the Template Kit, click `New: Content paragraph`.

✔ A window for selecting the paragraph type opens on the right-hand side.

→ 2. Click `RSS feed`.



✔ The configuration window for the selected paragraph type opens.

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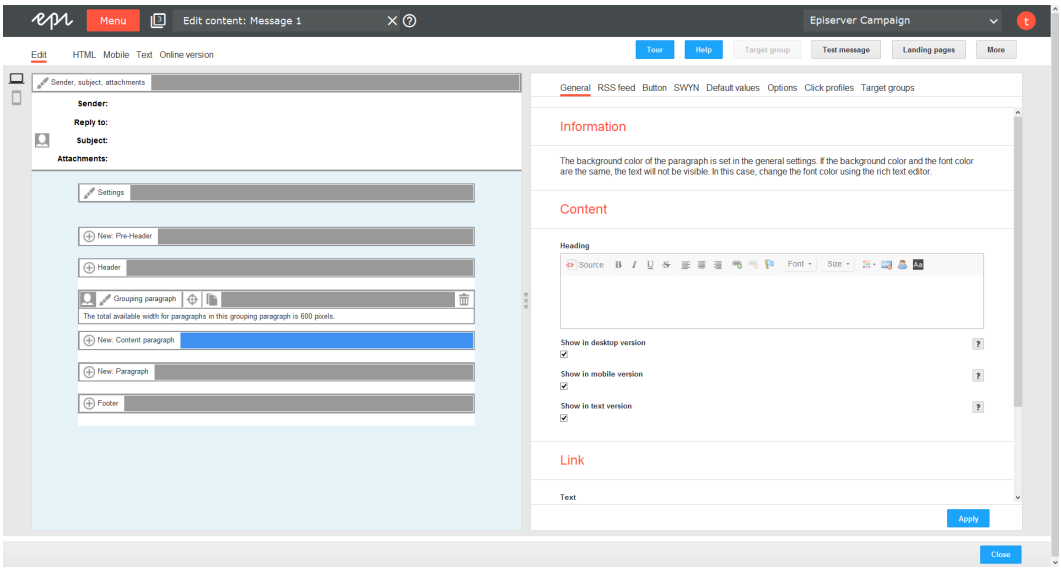
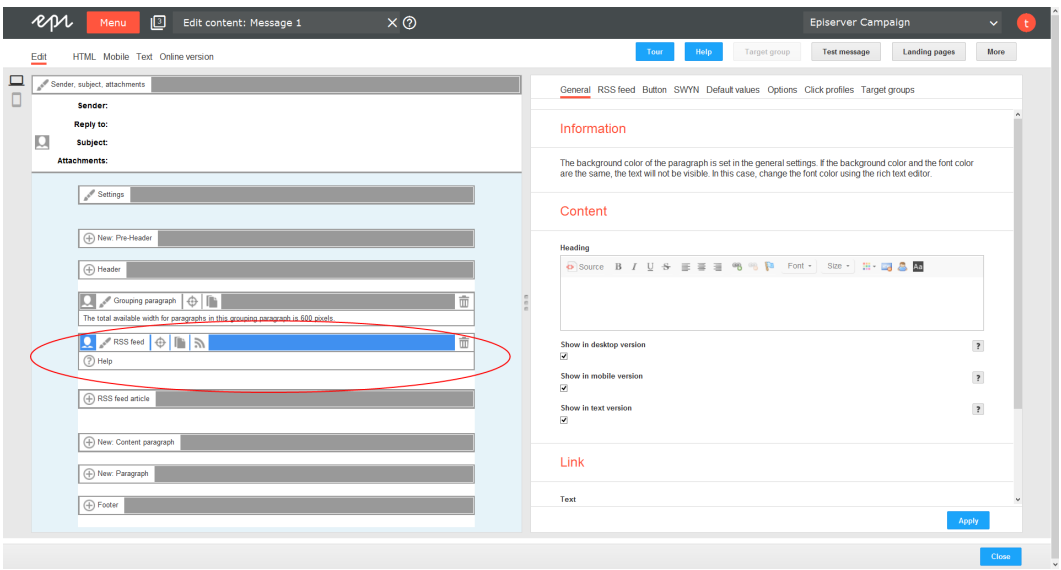


→ 3. Do not change any settings in the configuration window. Click Apply.

✔ You have created a new **RSS feed** type content paragraph, which will now be referred to as the **RSS feed paragraph**. The newly created RSS feed paragraph appears on the left side in the preview window.



Configure the RSS feed paragraph

To configure an RSS feed paragraph, perform the following steps:

→ 1. On the left-hand side of the preview in the menu bar of the RSS feed paragraph, click RSS feed.

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2. The following tables in the various tabs can be used to apply various settings. Change the settings as desired and confirm your entries by clicking Apply in the lower right.

General tab

RSS feed tab

Button tab

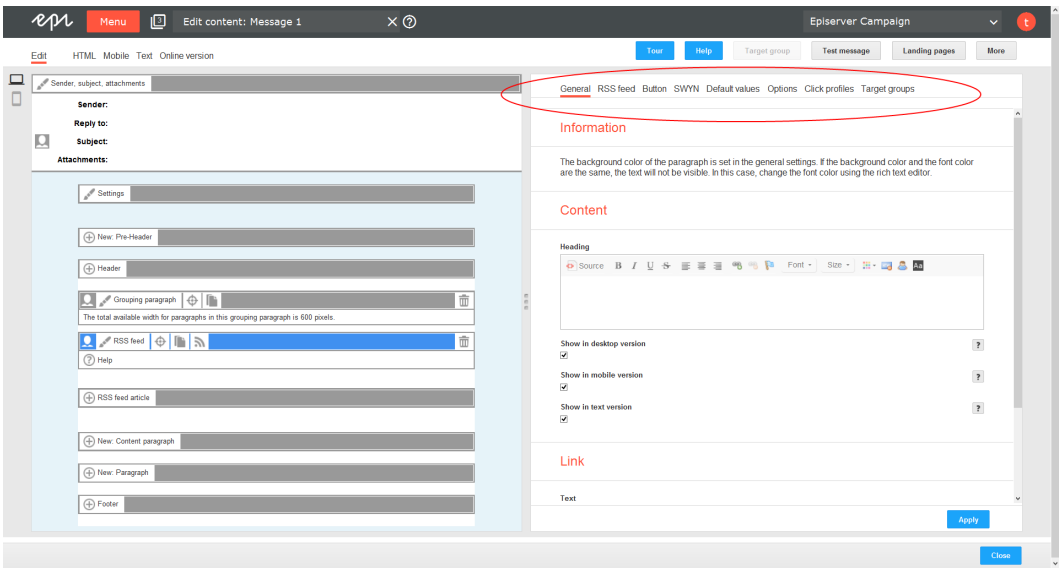
SWYN tab

Default values tab

Options tab

Click profiles tab

Target groups tab



You have successfully configured the RSS feed paragraph.

General tab

Parameter	Description
Content...	
Heading	Enter a heading for the paragraph.
Show in desktop version	Select this check box to show the paragraphs in the desktop version of the mailing.

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Parameter	Description
Show in mobile version	Select this check box to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect. If you have deactivated the mobile version, then this feature will not be applied.
Show in text version	Select this check box to show the paragraph in the text version of the mailing.
Link...	
Text	This text will be subsequently linked in the mailing.
URL	Indicate the landing page of the RSS feed or another URL, for example.
Alignment	You can position the link to the right, left, or center.

RSS feed tab

Parameter	Description
URL	Enter the URL of the RSS feed from which the content should be loaded.
Maximum number of entries	The maximum value is 20 entries. If you do not specify a value, 10 entries (if available) will be retrieved from the RSS feed and inserted into the newsletter. If more entries are available in the RSS feed, they will be ignored. If you enter 0, then the default value of 10 entries will also be retrieved. This option is only applicable for the retrieval of RSS feeds. Changing this number will not affect the posts that have already been loaded. Note that the **Category filter** option is applied only after the entries are retrieved, which means that a lower number of entries may be displayed.
Date format	This option is only applicable for the retrieval of RSS feeds. Changing the date format will not affect the posts that have already been loaded.
Category filter	All entries in the RSS feed are displayed by default. If your RSS feed is divided into different categories, you can filter them by a specific term, which is supplied in the **Categories** field of the RSS feed.

Button tab

More information on this topic can be found in the documentation on the Click2Go feature.

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SWYN tab

In this tab you can configure the content that is shared on social networks. The entries in the **Default values** area are valid for all networks unless you overwrite them with entries for individual networks. To enable sharing on a social network for this paragraph, activate the **Show** check box for the appropriate network.

Parameter	Description
General...	
Alignment	The links (symbols and text) and the introductory text are right-aligned by default.
Position	The links (symbols and text) and the introductory text are positioned at the bottom edge of the paragraph by default.
Default values...	
Title	This title is displayed in the user profile by default when the user shares the paragraph on a social network, provided that no other title has been indicated for the specific network (see below). A maximum of 50 characters are displayed.
Text	This text is displayed by default in the user profile when the user shares the paragraph on a social network, provided that no other text has been specified for the specific network (see below). A maximum of 250 characters are displayed.
Image	This image is displayed by default in the user profile next to the text when the user shares the paragraph on a social network, provided that no other image has been specified for the specific network (see below). The maximum image size is 100 x 100 pixels. Larger images are scaled down to this size.
Facebook...	
Show	Activate this option to allow recipients to share the paragraph via their Facebook profile.
Title	This title is displayed when the recipient shares the paragraph on his or her Facebook profile. If you do not enter anything here, the standard title will be displayed. The maximum text length is 50 characters.
Text	This text is displayed when the recipient shares the paragraph on his or her Facebook profile. If you do not enter anything here, the standard text will be displayed. The maximum text length is 250 characters.
Image	This image is displayed when the recipient shares the paragraph on his or her Facebook profile. If you do not enter anything here, the standard image will be displayed. The maximum image size is 100 x 100 pixels. Larger images are scaled down to this size.

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Parameter	Description
Forward directly	By default, a landing page is created that displays the content of the linked paragraph. If you select this option, the link will direct recipients to the URL specified in the **General** tab.
Twitter...	
Show	Select this option to allow recipients to share the paragraphs on their Twitter account.
Title	This title is displayed when the recipient shares the paragraph on his or her Twitter account. If you do not enter anything here, the standard title will be displayed. The maximum text length is 50 characters.
Forward directly	By default, a landing page is created that displays the content of the linked paragraph. If you select this option, the link will direct recipients to the URL specified in the **General** tab.
MySpace...	
Parameters for MySpace are identical with those for Facebook.	
Xing...	
Parameters for Xing are identical with those for Twitter.	

Default values tab

The values defined here are inherited from the RSS feed items integrated with this paragraph. When the RSS feed is retrieved, all existing paragraphs are removed and the available entries are created as new paragraphs. These values can be overwritten when the individual items are manually post-edited.

Parameter	Description
Link...	
Text	This text will be subsequently linked in the mailing.
Alignment	You can position the link to the right, left, or center.
Link to comments...	
Text	This text will be subsequently linked in the mailing.
Alignment	You can position the link to the right, left, or center.
Image...	

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Parameter	Description
Position	The image can be positioned in a separate column next to the heading where it follows the text, or it can be placed in a separate column under the heading but next to the text. These positions are recommended in most cases. If you are using large images that take up the entire available width, you can position them centered under the heading, under the text or below the link.

Options tab

Parameter	Description
Visual appearance...	
Width	The maximum available width is used by default. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value will be ignored.
Height	The paragraph is displayed over the entire available height by default, taking into account the content. Alternatively, you can specify a fixed height value here. If the content exceeds this height, the value will be ignored and the entire content displayed at the corresponding height.
Background color	Enter the hex code for the background color. Click on this field to open the color selector. You can enter any color value you like here. The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	You can specify the padding for each page differently. If the value is set to "0", then there will be no padding. The information is structured as follows: » one value, e.g. "10" sets the padding to the same value on all pages. » two values, e.g. "10 15" set the upper and lower padding to 10 pixels and the right and left padding to 15 pixels. » four values, e.g. "20 10 0 10" set the upper padding to 20 pixels, the right and left padding to 10 pixels, and no padding on the bottom.
Space between the items	A space with this height is placed between the individual items. By default, the first number in the **Padding** option is used. This option is only enabled when using the standard layout. Enter an integer value (pixels) to create a space between the items.
Layout	In the **RSS feeds** Tab in the general settings, specify the layouts for the RSS feed items. If there is no content available for the selected layout, the default layout is used.

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Parameter	Description
Alternative table of contents entry	Optional: If you select the option **Show the heading of the RSS feed paragraph in the table of contents** under **Area**, you can change the heading of the RSS feed paragraph that will be displayed in the table of contents.

Click profiles tab

Parameter	Description
Click profiles	Clicks on all of the links contained in the paragraph are allocated to the selected click profiles. Alternatively, you can allocate individual links to a click profile in the **Tracking** settings in the mailing creation wizard. You can create click profiles in the **Click profiles** menu item.

Target groups tab

Parameter	Description
Target groups	If you only want the paragraph to be displayed to a certain recipient segment, select one or more target groups here. If you select multiple target groups, then only one of these target groups needs to be applied (OR linked to). Target groups that filter a recipient segment can be created in the **Target groups** menu item.

Retrieve RSS feeds and load RSS feed items

In the next step you will load the desired RSS feed items from the RSS feed into your mailing. Perform the following steps:

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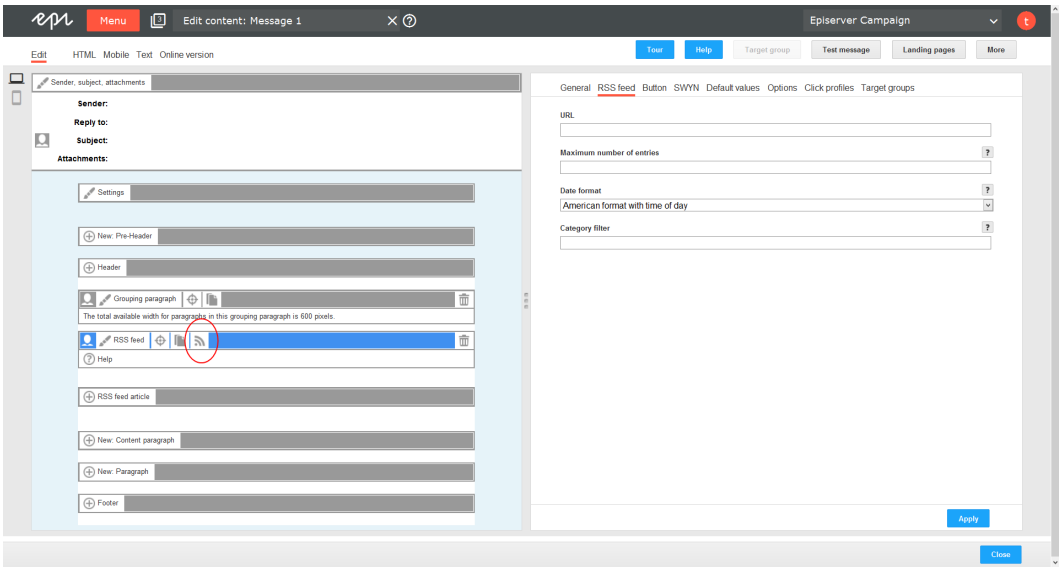
1. In the menu bar of the RSS feed paragraph, click .



✔ An information window opens. You are asked to confirm the retrieval of the RSS feed.

> If you have previously retrieved the RSS feed, the already loaded and possibly edited content will be overwritten with the current content of the RSS feed.

2. Click **Next**.

✔ You have successfully retrieved the RSS feed. The loaded RSS feed items will be displayed to the left in the preview.

Edit the loaded RSS feed items

To edit downloaded RSS feed items, perform the following steps:

1. In the menu bar of the corresponding RSS feed item, click **RSS feed**.

✔ On the right-hand side, a window for editing the content of the RSS feed item opens.

2. Make your changes to the RSS item.

3. Click **Apply**.

✔ You have successfully edited the RSS feed item. The updated content will be displayed to the left in the preview.

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When you click in the menu bar of the RSS feed paragraph, the RSS feed is retrieved again and your edited RSS feed articles are overwritten with the current content of the RSS feed. After you modify RSS feed articles, only click if you want to reset the changes.

Recommendations paragraph

Recommendation generators allow you to send individualized recommendations in real time mailings – i.e. any time a recipient accesses a mailing. The recommendations are generated on the basis of recipient history and predefined algorithms and retrieved via a URL. Depending on the provider, one or more URLs are made available to each recipient, which they can use to access a variety of elements:

- Product pictures
- Name of a product and other text (shown as graphics)
- Link to the product landing page

The recommendation paragraph contains input fields for these URLs for multiple recommendations, providing you with further layout options. You can set the recommendation paragraph within the header and footer area and inside the grouping paragraphs. The Template Kit can contain multiple recommendation paragraphs. However, note that only a limited number of different recommendations can be provided for a recipient by the recommendation provider.

Fallback for new recipients and incomplete URLs

Always store a fallback for your provider so that new recipients without a history can also be shown a recommendation and so that URLs with missing or incorrect parameters can be compensated for. Otherwise, an empty image placeholder will be shown in the mailing, since no graphic was able to be retrieved from the recommendation server.

Format of the recommendation URLs

The URLs for the recommendations include multiple parameters that contain the customer, the recipient, a layout, the type (text, image, or link), and the number of the recommendation (for more than one). A recommendation can only be generated when all parameters are generated correctly.

The URL structure described below is only an example. See the provider you have selected for details.

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```
http://host:port/rde_server/res/[NL-RDE-ID]/newsletter/recomm/ [Name-of-newsletter-template]/usr/[User-ID] ?requestType=textImage&recoIndex=[Index]&channel=NL
```

- **NL-RDE-ID**[1]: This is your customer ID; you will receive this from the recommendation provider.
- **Name-of-newsletter template**[1]: The template determines the recommendation stored for the recommendation provider.
- **User ID**[2]: This is the recipient ID on the basis of which the individually recommendations are generated.
- **Index**[3]: Depending on the provider, you can process multiple recommendations for each recipient. Use this parameter to select the corresponding consecutive number.

Integrate a recommendation paragraph in a mailing

A recommendation paragraph can be integrated into a mailing in the following steps:

1. Create a new content paragraph of the **Recommendations** type.
2. Configure the recommendation paragraph.

Create a recommendations paragraph

To create a new content paragraph of the **Recommendations** type, perform the following steps:

→ 1. While editing the content of a mailing in the Template Kit, click `New: Content paragraph`.

You can also use the paragraph in the header and footer area. To create the paragraph in the header area, click `New: Header paragraph`. To create the paragraph in the footer area, click `New: Footer paragraph`.

✔ A window for selecting the paragraph type opens on the right-hand side.

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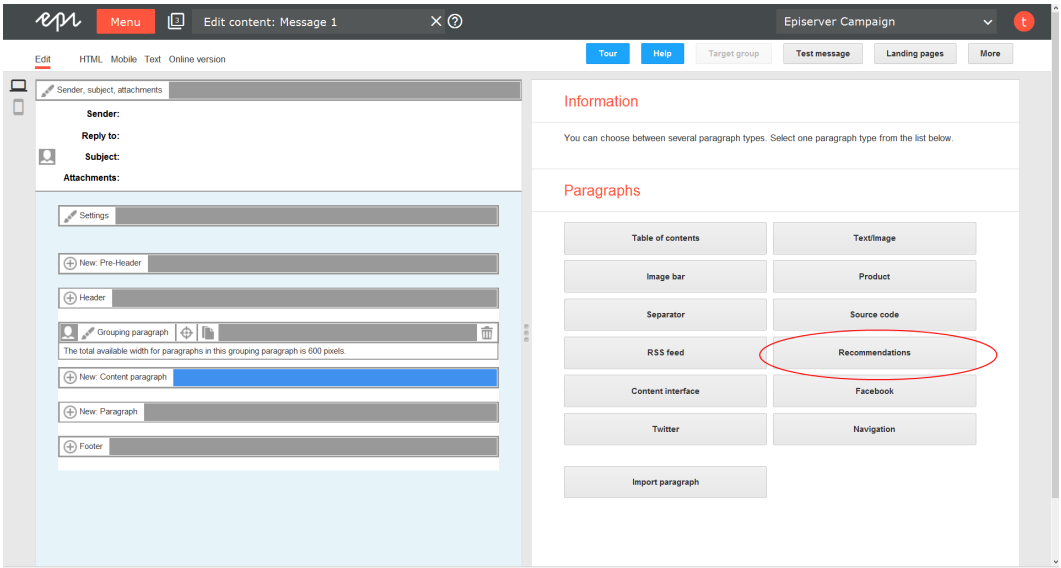
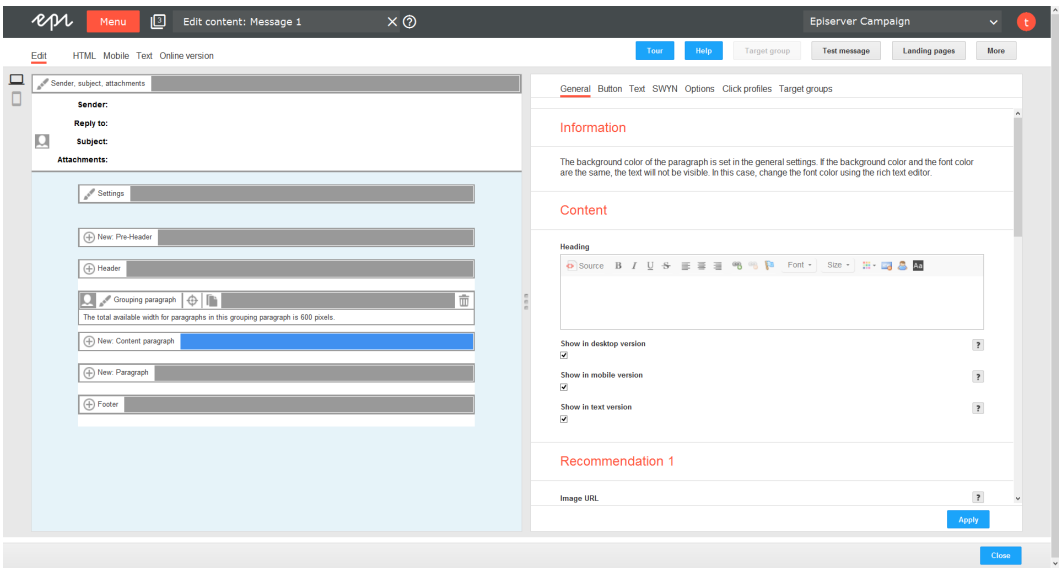
➔ 2. Click Recommendations.



✔ The configuration window for the selected paragraph type opens.



➔ 3. Click Apply.

✔ This creates a new **Recommendations** type content paragraph. The newly created recommendation paragraph appears on the left side in the preview window.

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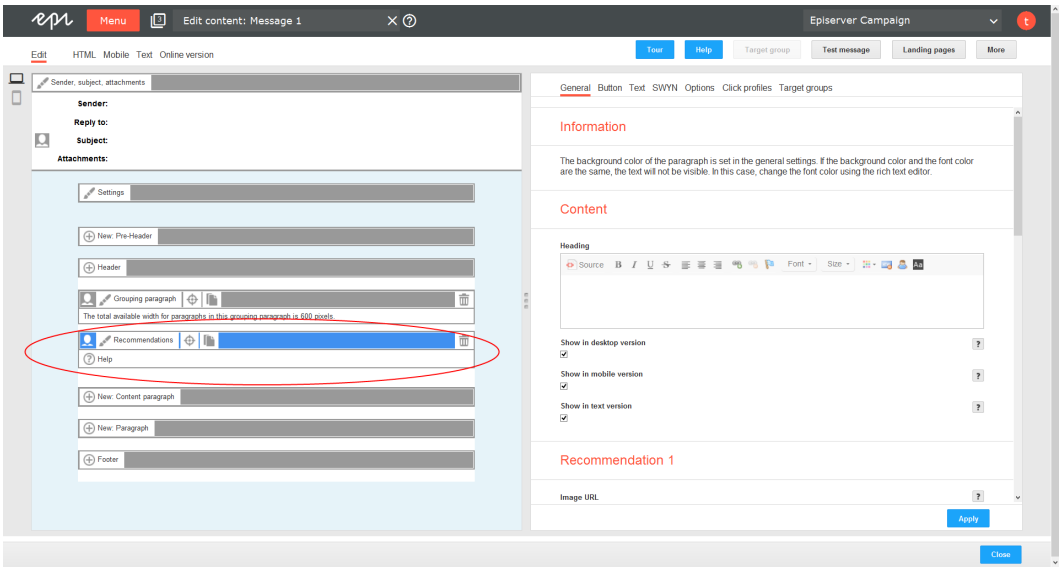

Configure a recommendation paragraph

To configure a recommendation paragraph, perform the following steps:

1. On the left-hand side of the preview, in the menu bar of the recommendation paragraph, click Recommendations .

✔ The configuration window opens on the right-hand side.

2. For the setting options, see the following tables in the individual tabs. Change the settings as desired and confirm your entries by clicking Accept .

- General tab
- Text tab
- SWYN tab
- Options tab
- Click profiles tab
- Target groups tab

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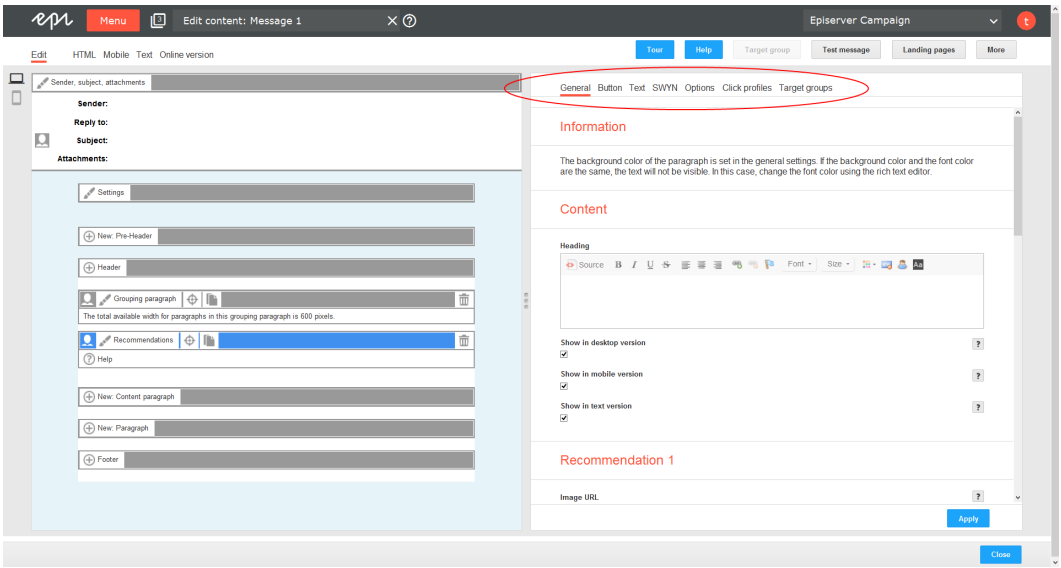

✔ You have successfully configured the recommendation paragraph.

General tab

Parameter	Description
Contents...	
Heading	Enter a paragraph caption.
Show in desktop version	Select this check box to include this paragraph in the desktop version of the mailing.
Show in mobile version	Select this check box to include this paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect. If you disabled the mobile version, this option has no function.
Show in text version	Select this check box to include this paragraph in the text version of the mailing.
Recommendation 1...5	
Image URL	This URL is used to generate the product image that appears in a mailing. The height and width of the graphic is set by the recommendation provider and cannot be adjusted to fit the template.
Text URL	This URL is used to generate the product name that appears in a mailing

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Parameter	Description
	The text is displayed as a graphics file. The height and width of the graphic is set by the recommendation provider and cannot be adjusted to fit the template.
Link	This URL is used to generate a link to the product landing page that appears in a mailing. The layout of the links (color, text etc.) is set by the recommendation provider and cannot be adjusted to fit the template.

Text tab

Recommendations are incorporated into mailings in the form of graphics and are therefore not displayed in the text version – except for the caption, if one has been provided. Instead, you can enter a substitute text for use in the text version of the mailing. If you do not want the paragraph to appear in the text version, disable the option **Show in text version** in the **General** tab.

Parameter	Description
Text	Enter an alternate text for use in the text version of a mailing. Recommendations will not appear in the text version, except for the caption.

SWYN tab

Go to this tab to configure content that will be shared in social networks. Entries made in **Default values** apply to all networks as they are not overwritten by specific entries you may make in individual networks. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you wish them to appear.

Parameter	Description
General...	
Alignment	By default, the links (symbols and text) and introductory text will be right-justified.
Position	By default, the links (symbols and text) and introductory text will be placed on the bottom margin of the paragraph.
Default values...	
Title	This title will appear in the user profile when the user shares the paragraph in a social network and

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Parameter	Description
	if no other title has been specified for that particular network (see below). A maximum of 50 characters can be displayed.
Text	This text will appear in the user profile when the user shares the paragraph in a social network and if no other title has been specified for that particular network (see below). A maximum of 50 characters can be displayed.
Image	This image will appear next to the text in the user profile when the user shares the paragraph in a social network and if no other title has been specified for that particular network (see below). The maximum image size is 100 x 100 pixels. Larger images are scaled down to this size.
Facebook...	
Show	Select this check box to allow recipients to share a paragraph via their Facebook profile.
Title	This title will appear when a recipient shares a paragraph in his/her Facebook profile. If you do not enter anything here, the default title will be displayed. The maximum text length is 50 characters.
Text	This text will appear when a recipient shares a paragraph in her/her Facebook profile. If you do not enter anything here, the default text will be displayed. The maximum text length is 250 characters.
Image	This image will appear when a recipient shares a paragraph in his/her Facebook profile. If you do not enter anything here, the default image will be displayed. The maximum image size is 100 x 100 pixels. Larger images will be scaled down to this size.
Twitter...	

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Parameter	Description
Show	Select this check box to let recipients share paragraphs through their Twitter accounts.
Title	This title is displayed when a recipient shares a paragraph through his/her Twitter account. If nothing is entered here, the default title will be displayed. The maximum text length is 50 characters.
MySpace...	
Parameters for MySpace are identical with those for Facebook.	
Xing...	
Parameters for Xing are identical with those for Twitter.	

Options tab

Parameter	Description
Layout...	
Width	Standard practice is to use the maximum available width. This is determined by interior spacing (space between element content and element border) and also depends on whether or not a sidebar is used and, if so, the width of the sidebar. Enter a value in pixels that differs from this. If the maximum available width is less than the value you enter, your entry is disregarded.
Height	Standard practice is to display a paragraph using the maximum available height, taking into consideration content. Alternatively, you can enter a fixed value for height. If the content exceeds this height, the value you entered is disregarded and the content displayed in the appropriate height.
Recommendation layout	Images and text used in a recommendation can be placed next to or on top of each other. Bear in mind the available width when changing the layout.
Space between image and text	Specify (in pixels) how much space there should be between image and text in a recommendation.
Space between the recommendations	Specify (in pixels) how much space there should be between multiple recommendations. This value is irrelevant if you are only inserting one recommendation.

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Parameter	Description
Arrangement	Indicate whether multiple recommendations should be placed next to each other in one paragraph (e.g. in the main body of the text space) or on top of each other (e.g. in the sidebar next to the main body of the text space). This value is irrelevant if you are only inserting one recommendation.
Alignment	Specify how the recommendations should be arranged in a paragraph. This value will only be applied if the width of all recommendations is less than the width available in the main body of the text space.
Background color	Background color is entered as hex code. Click the green triangle in this field to display a list of standard web colors. The corresponding color is displayed next to each of the color codes. You can specify any number of colors. Colors that are not web-compliant may differ in appearance from the original, depending on the type of browser used.
Padding	You may specify different internal spacing for each page. The value 0 is permitted, meaning no internal spacing is set. Spacing can be specified in the following manner: » one value, e.g. "10" indicates that internal spacing will have the same value on all sides. » two values, e.g. "10,15" indicates that internal spacing will be 10 pixels on top and bottom and 15 pixels left and right. » four values, e.g. "20, 10, 0, 10," indicates that internal spacing will be 20 pixels on top, 10 pixels on both the left and right sides and no border set for the bottom.
Border...	
Show	Use this option if you want to apply borders around the entire paragraph.
Border width	The border width is indicated in pixels using whole numbers. You may set a different border width for each side. The value 0 is permitted, indicating that no border is to be displayed. The border width can be specified in the following manner: » one value, e.g."2" indicates that border width will be the same on all sides. » two values, e.g. "2, 4" indicates that border width will be 2 pixels on top and bottom and 4 pixels left and right. » four values, e.g. "2, 1, 0, 1" indicates that border width will be 2 pixels on top, 1 pixel on the left and right sides and no border width set for the

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Parameter	Description
	bottom.
Color	Border color is entered as hex code. Click the green triangle in this field to display a list of standard web colors. The corresponding color is displayed behind each of the color codes. You can specify any number of colors. Colors that are not web-compliant may differ in appearance from the original, depending on the type of browser used.
Mobile...	
Width	Specify the width of the paragraph (in %) for the mobile version. Standard practice is to use all available width. You will need to set the width of two consecutive paragraphs so that together they equal 100% in order for the two paragraphs to display side-by-side in the mobile version. Otherwise they are displayed on top of one another, each with its own width setting.
Maximum width of the text image	The maximum width is entered as a percentage and will only take effect, when the text is positioned to the left or to the right of the image. The value must be between 10 and 90. By default, a maximum width of 50 % is used.
Table of contents...	
Show in table of contents	Clear this check box if you want the paragraph to not appear in the table of contents.
Alternative table of contents entry	Enter the caption that will appear in the table of contents. If you make no entry, the heading specified in the **General** tab is displayed.

Click profiles tab

Parameter	Description
Click profile	Clicks on any link in this paragraph are allocated to the selected click profiles. See the Click profiles section if you want to create click profiles.

Target groups tab

Parameter	Description
Target groups	If you want this paragraph only to be shown to a certain recipient segment, select one or more target groups here. If more than one target groups are selected, just one must match (OR logic). See the Target groups section if you want to create target groups.

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[1] These parameters may not be modified.
[2] This parameter transfers the recipient ID.
[3] The index is consecutively numbered in a paragraph. If you are using multiple recommendation paragraphs, then the index must be consecutively numbered for all of the paragraphs.

Facebook paragraph

Use the Facebook paragraph to integrate up to 25 current Facebook posts into your messages. Keep your recipients up-to-date with exciting topics from your social network.

Dynamic or static: Decide whether Episerver Campaign updates the Facebook paragraph every time you send a message and automatically loads the latest posts from your Facebook timeline, or whether Episerver Campaign only displays the Facebook posts you defined when creating or modifying the campaign.

Advantages and disadvantages of dynamic and static integration

Dynamic integration always displays your latest social media activities. However, you cannot permanently delete individual posts in the Facebook paragraph. For example, if your message has a **Wait** node to delay sending, or is sent multiple times as part of the Marketing Automation, then Episerver Campaign will synchronize the Facebook paragraph with your Facebook timeline each time the message is sent. If you have deleted individual posts from the Facebook paragraph, but these posts are still available on your Facebook timeline, then the posts will be reloaded into the Facebook paragraph.

Static integration gives you more control over the posts that appear in the Facebook paragraph. When creating a message, you can select which of your current posts should be integrated. You can delete individual posts – when the message is sent; Episerver Campaign will not update the Facebook paragraph from your Facebook timeline. Changes can still be made, but will not happen automatically. When using static integration, you can manually update the Facebook paragraph.

By default, Episerver Campaign integrates your Facebook posts statically. If you would like Episerver Campaign to use dynamic integration for your Facebook posts, contact customer support, who will change the default integration.

➜ To configure the Facebook paragraph for a message, perform the steps described in the following table:

- General tab
- Settings tab
- Button tab
- SWYN tab

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- Default values tab
- Options tab
- Click profiles tab
- Target groups tab

General tab

Parameter	Description
Content...	
Heading	Enter a heading for the paragraph.
Show in desktop version	Select this check box to show the paragraph in the desktop version of the mailing.
Show in mobile version	Select this check box to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect. If you have deactivated the mobile version, then this function will not be applied.
Show in text version	Select this check box to show the paragraph in the text version of the mailing.
Link...	
Text	This text is subsequently linked to in the mailing.
URL	Enter a link here (e.g. the landing page for the product group).
Orientation	You can position the link at the right-hand side, the left-hand side or in the center.

Settings tab

Parameter	Description
Account name	Enter your public Facebook user name. Your public Facebook user name is the name used in the web address for your Facebook timeline. It is the last part of the URL: https://facebook.com/*User name*.

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Parameter	Description
	If the display of your Facebook page is limited to specific countries, Facebook posts will not load successfully if you or your recipients are located outside of the countries for which the display is allowed.
Maximum number of entries	Enter the maximum number of Facebook posts that should be displayed in your message. The maximum value for this is 25 posts. If you enter 0 into this field or leave it empty, a default value of 10 Facebook posts will be used (if fewer than 10 posts are available in your Facebook account, correspondingly less posts are retrieved and displayed). Also, when using static integration, changing this value will have no effect on any posts already retrieved. You must manually update the Facebook paragraph, in order for the new number of posts to take effect.
Date format	In the drop-down list, select a date format to be displayed next to your Facebook posts. Changing the date format will have no effect on Facebook posts that have already been retrieved when using static integration. You must manually update the Facebook paragraph, for the change of the date format to take effect.

Button tab

More information on this topic can be found in the documentation on the Click2Go function.

SWYN tab

You can activate sharing via social networks for each content paragraph. This function can be configured from this tab.

Parameter	Description
General...	
Alignment	By default, the links (symbols and text) and the introduction text are right-aligned.

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Parameter	Description
Position	By default, the links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values...	
Title	This title is displayed in the user's profile by default when the user shares the paragraph over a social network, and provided that no other title has been indicated for the specific network (see below). Displays a maximum of 50 characters.
Text	This text is displayed in the user's profile as a default when the user shares the paragraph over a social network, and provided that no other text has been specified for the specific network (see below). A maximum of 250 characters are displayed.
Image	This image is displayed in the user's profile next to the text as standard when the user shares the paragraph over a social network, and provided that no other image has been specified for the specific network (see below). The maximum image size is 100 x 100 pixels. Larger images are scaled down to this size.
Facebook...	
Show	Activate this option to allow recipients to share the paragraph via their Facebook profile.
Title	This title is displayed when the recipient shares the paragraph on his or her Facebook profile. If you do not enter anything here, the standard title will be displayed. The maximum text length is 50 characters.
Text	This text is displayed when the recipient shares the paragraph on his or her Facebook profile. If you do not enter anything here, the standard text will be displayed. The maximum text length is 250 characters.
Image	This image is displayed when the recipient shares the paragraph on his or her Facebook profile. If you do not enter anything here, the standard image will be displayed. The maximum image size is 100 x 100 pixels. Larger images are scaled down to this size.
Redirect	A landing page is created as standard that displays the content of the linked paragraph. If you select this check box, the link will take recipients to the URL specified in the **General** tab.
Twitter...	
Show	Activate this option to allow recipients to share the paragraph via their Twitter account.
Title	This title is displayed when the recipient shares the paragraph on his or her Twitter account. If you do not enter anything here, the standard title will be displayed. The

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Parameter	Description
	maximum text length is 50 characters.
Redirect	A landing page is created as standard that displays the content of the linked paragraph. If you select this check box, the link will take recipients to the URL specified in the **General** tab.
MySpace...	
Parameters for MySpace are identical with those for Facebook.	
Xing...	
Parameters for Xing are identical with those for Twitter.	

Default values tab

Parameter	Description
Link...	
Text	Facebook posts in your messages are automatically linked to the original Facebook post. To make this clearer to your recipients and to highlight the links, you can add some additional text – for example, "More information on our Facebook page" or "Go to original post on Facebook". Enter your text into the field. Leave this field empty if you do not wish to highlight that clicking on the Facebook post in your messages will take the recipient to your Facebook page. The text entered here is added to all Facebook posts and will be shown with each individual Facebook post in your message.
Orientation	The text can be aligned to the right, left or center.
Image...	
Position	In the drop-down list, select the position where the image associated with your Facebook post (if any) should be displayed.

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Parameter	Description
	If your Facebook post contains several images, then the first image from your post will be used. It is not possible to display several images or any image other than the first.

Options tab

You can give each content paragraph a different appearance from the general layout. To do so, use the layout configuration in this tab.

Parameter	Description
Layout...	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value will be ignored.
Height	The paragraph is displayed over the entire available height as standard, taking into account the content. Alternatively, you can specify a fixed height value here. If the content exceeds this height, the value will be ignored and the entire content displayed at the corresponding height.
Background color	The background color is given as a Hex code. Click on the green triangle in this field to display a list of standard web colors. The corresponding color is shown behind each color code. You can enter any color value you like here. The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	You can specify a different internal spacing for each page. The information is structured as follows: » One value, e.g. "10" sets the internal spacing to the same value on all sides. » Two values, e.g. "10 15" sets the internal spacing to 10 pixels at the top and bottom, and 15 pixels on the left and right. » Four values, e.g. "20 10 0 10" sets the internal spacing to 20 pixels at the top, to 10 pixels on the right, to no border at the bottom, and to 10 pixels on the left.
Space between articles	A space with this height is placed between individual items. By default, the first number in the option **Padding** is used. This option is only enabled when using the standard layout.

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Parameter	Description
Layout	In the general settings in the **Content interface** tab, you can define the layouts for the items. If no content is available in the settings for the selected layout, the standard layout will be used.
Border...	
Show	Select this check box if you want to apply a border around the entire paragraph.
Border width	The border width is specified in pixels as a whole number. You can specify different border widths for each side. The information is structured as follows: » One value, e.g. "2" sets the border width to the same value on all sides. » Two values, e.g. "2 4" sets the border width to 2 pixels at the top and bottom, and 4 pixels on the left and right. » Four values, e.g. "2 1 0 1" sets the border width to 2 pixels at the top, to 1 pixel on the right, to no border at the bottom, and to 1 pixel on the left.
Color	The border color is given as a Hex code. Click on the green triangle in this field to display a list of standard web colors. The corresponding color is shown behind each color code. You can enter any color value you like here. The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile...	
Width	Set the width of the paragraph in the mobile view here. The entire width is used as standard. The widths of two consecutive paragraphs must be set in such a way that the two widths combine to make 100%. These two paragraphs will then be displayed next to one another in the mobile view. Otherwise, the two paragraphs will be displayed on top of one another with the particular allocated widths.
Table of contents...	
Show in table of contents	Activate this option to display the paragraph in the table of contents for the section.
Alternative table of contents entry	Enter the heading that you want to be displayed in the table of contents here. If you do not enter anything here, then the heading from the **General** tab will be displayed here.

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Click profiles tab

Parameter	Description
Click profiles	Clicks on all of the links contained in the paragraph are allocated to the selected click profiles. Alternatively, you can allocate individual links to a click profile in the **Tracking** settings for the mailing creation wizard. You can create click profiles in the **Click profile** menu item.

Target groups tab

Parameter	Description
Target groups	If you only want the paragraph to be displayed to a certain recipient segment, select one or more target groups here. If you select multiple target groups, then only one of these target groups needs to apply (OR linking). Target groups that filter a recipient segment can be created in the **Target groups** menu item

→ Once you have adjusted the settings described in the table, click Apply.

✔ The Facebook paragraph is displayed in the Template Kit, but still without any loaded posts.

To load your Facebook posts, perform the following steps:

→ 1. In the menu bar of the Facebook paragraph, click .

→ 2. Confirm that you want to load your Facebook posts by clicking Continue.

✔ You have now successfully loaded your Facebook posts.

If the display of your Facebook page is limited to specific countries and you are located outside of these countries, Facebook posts will not load successfully.

Manually update Facebook posts

You can manually update your Facebook posts in the Facebook paragraph and reload from your timeline.

To manually update your Facebook posts, perform the following steps:

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→ 1. In the menu bar of the Facebook paragraph, click .

→ 2. Confirm that you want to update your Facebook posts by clicking Continue.

✔ You have now successfully updated your Facebook posts.

Delete Facebook posts

To delete individual Facebook posts that have already been loaded, perform the following steps:

→ 1. In the menu bar of the Facebook post you wish to delete, click **Delete** .

→ 2. Confirm your selection by clicking OK. You have now successfully deleted the Facebook post from the Facebook paragraph.

If you manually update your posts in the Facebook paragraph, previously deleted posts will be reloaded unless the posts were also deleted from your Facebook timeline. Also, any deleted Facebook posts will be automatically reloaded into your message when sending if customer support has set up dynamic integration for Facebook entries.

Twitter paragraph

Use the Twitter paragraph to integrate up to 20 current tweets into your messages. Keep your recipients up-to-date with exciting topics from your social network.

Dynamic or static: Decide whether Episerver Campaign updates the Twitter paragraph every time you send a message and automatically loads the latest tweets from your Twitter timeline, or whether Episerver Campaign only displays the tweets you defined when creating or modifying the campaign.

Advantages and disadvantages of dynamic and static integration

Dynamic integration always displays your latest social media activities. However, you cannot permanently delete individual tweets in the Twitter paragraph. For example, if your message has a wait node to delay sending or is sent multiple times as part of the Marketing Automation, then Episerver Campaign will synchronize the Twitter paragraph with your Twitter timeline each time the message it is sent. If you have deleted individual posts from the Twitter paragraph, but these tweets are still available on your Twitter timeline, then the tweets will be reloaded into the Twitter paragraph.

Static integration gives you more control over the tweets that appear in the Twitter paragraph. When creating a message you can select which of your current tweets are to be integrated. You can delete individual tweets – when the message is sent, Episerver Campaign will not update the Twitter paragraph from your Twitter timeline. Changes can still be made, but will not happen automatically. When using static integration, you can manually update the Twitter paragraph.

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By default, Episerver Campaign integrates your tweets statically. If you would like Episerver Campaign to use dynamic integration for your tweets, contact customer support who will change the default integration.

→ To configure the Twitter paragraph for a message, perform the steps described in the following table:

General tab

Parameter	Description
Content...	
Heading	Enter a heading for the paragraph.
Show in desktop version	Select this check box to show the paragraph in the desktop version of the mailing.
Show in mobile version	Select this check box to show the paragraph in the mobile version of the mailing. The **Activate mobile version** option in the general settings must be activated for this option to take effect. If you have deactivated the mobile version, then this function will not be applied.
Show in text version	Select this check box to show the paragraph in the text version of the mailing.
Link...	
Text	This text is subsequently linked to in the mailing.
URL	Enter a link here (e.g. the landing page for the product group).
Orientation	You can position the link at the right-hand side, the left-hand side or in the center.

Settings tab

Parameter	Description
Account name	Enter your public Twitter user name. Your public Twitter user name is the name used in the web address for your Twitter timeline. It is the last part of the URL:

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Parameter	Description
	https://twitter.com/User name.
Maximum number of entries	Enter the maximum number of tweets that should be displayed in your message. The maximum value for this is 20 tweets. If you enter 0 into this field or leave it empty, a default value of 10 tweets will be used (if fewer than 10 tweets are available in your Twitter account, correspondingly less tweets are retrieved and displayed). Also, when using static integration, changing this value will have no effect on any tweets already retrieved. You must manually update the Twitter paragraph, in order for the new number of tweets to take effect.
Date format	In the drop-down list, select a date format to be used next to your tweets. Changing the date format will have no effect on tweets that have already been retrieved when using static integration. You must manually update the Twitter paragraph, for the change of the date format to take effect.

Button tab

More information on this topic can be found in the documentation on the Click2Go function.

SWYN tab

You can activate sharing via social networks for each content paragraph. This function can be configured from this tab.

Parameter	Description
General...	
Alignment	By default, the links (symbols and text) and the introduction text are right-aligned.
Position	By default, the links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values...	
Title	This title is displayed in the user's profile by default when the user shares the paragraph over a social network, and provided that no other title has been indicated for the specific network (see below). Displays a maximum of 50 characters.
Text	This text is displayed in the user's profile as a default when the user shares the paragraph over a social network, and provided that no other text has been specified for the specific network (see below). A maximum of 250 characters are displayed.

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Parameter	Description
Image	This image is displayed in the user's profile next to the text as standard when the user shares the paragraph over a social network, and provided that no other image has been specified for the specific network (see below). The maximum image size is 100 x 100 pixels. Larger images are scaled down to this size.
Facebook...	
Show	Activate this option to allow recipients to share the paragraph via their Facebook profile.
Title	This title is displayed when the recipient shares the paragraph on his or her Facebook profile. If you do not enter anything here, the standard title will be displayed. The maximum text length is 50 characters.
Text	This text is displayed when the recipient shares the paragraph on his or her Facebook profile. If you do not enter anything here, the standard text will be displayed. The maximum text length is 250 characters.
Image	This image is displayed when the recipient shares the paragraph on his or her Facebook profile. If you do not enter anything here, the standard image will be displayed. The maximum image size is 100 x 100 pixels. Larger images are scaled down to this size.
Redirect	A landing page is created as standard that displays the content of the linked paragraph. If you select this check box, the link will take recipients to the URL specified in the **General** tab.
Twitter...	
Show	Activate this option to allow recipients to share the paragraph via their Twitter account.
Title	This title is displayed when the recipient shares the paragraph on his or her Twitter account. If you do not enter anything here, the standard title will be displayed. The maximum text length is 50 characters.
Redirect	A landing page is created as standard that displays the content of the linked paragraph. If you select this check box, the link will take recipients to the URL specified in the **General** tab.
MySpace...	The parameters for MySpace are the same as those in the Facebook section.
Xing...	The parameters for Xing are the same as those in the Twitter section.

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Default values tab

Parameter	Description
Link...	
Text	Tweets in your message are automatically linked to the original tweet on your Twitter page. To make this clearer to your recipients and highlight the links, you can add some additional text – for example, "More information on our Twitter page" or "View original tweet". To do this, perform the following step: Enter your text into the field. Leave this field empty if you do not wish to highlight that clicking on the tweet in your messages will take the recipient to your Twitter page. The text entered here is added to all tweets and will be shown with each individual tweet in your message.
Orientation	The text can be aligned to the right, left or center.
Image...	
Position	In the drop-down list, select the position where the image associated with your tweet (if any) should be displayed.

Options tab

You can give each content paragraph a different appearance from the general layout. To do so, use the layout configuration in this tab.

Parameter	Description
Layout...	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value will be ignored.
Height	The paragraph is displayed over the entire available height as standard, taking into account the content. Alternatively, you can specify a fixed height value here. If the content exceeds this height, the value will be ignored and the entire content displayed at the corresponding height.
Background	The background color is given as a Hex code. Click on the green triangle in this field to

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Parameter	Description
color	display a list of standard web colors. The corresponding color is shown behind each color code. You can enter any color value you like here. The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	You can specify a different internal spacing for each page. The information is structured as follows: » One value, e.g. "10" sets the internal spacing to the same value on all sides. » Two values, e.g. "10 15" sets the internal spacing to 10 pixels at the top and bottom, and 15 pixels on the left and right. » Four values, e.g. "20 10 0 10" sets the internal spacing to 20 pixels at the top, to 10 pixels on the right, to no border at the bottom, and to 10 pixels on the left.
Space between articles	A space with this height is placed between individual items. By default, the first number in the **Padding** option is used. This option is only enabled when using the standard layout.
Layout	In the general settings in the **Content interface** tab, you can define the layouts for the items. If no content is available in the settings for the selected layout, the standard layout will be used.
Border...	
Show	Select this check box if you want to apply a border around the entire paragraph.
Border width	The border width is specified in pixels as a whole number. You can specify different border widths for each side. The information is structured as follows: » One value, e.g. "2" sets the border width to the same value on all sides. » Two values, e.g. "2 4" sets the border width to 2 pixels at the top and bottom, and 4 pixels on the left and right. » Four values, e.g. "2 1 0 1" sets the border width to 2 pixels at the top, to 1 pixel on the right, to no border at the bottom, and to 1 pixel on the left.
Color	The border color is given as a Hex code. Click on the green triangle in this field to display a list of standard web colors. The corresponding color is shown behind each color code. You can enter any color value you like here. The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile...	
Width	Set the width of the paragraph in the mobile view here. The entire width is used as standard. The widths of two consecutive paragraphs must be set in such a way that

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Parameter	Description
	the two widths combine to make 100%. These two paragraphs will then be displayed next to one another in the mobile view. Otherwise, the two paragraphs will be displayed on top of one another with the particular allocated widths.
Table of contents...	
Show in table of contents	Activate this option to display the paragraph in the table of contents for the section.
Alternative table of contents entry	Enter the heading that you want to be displayed in the table of contents here. If you do not enter anything here, then the heading from the **General** tab will be displayed here.

Click profiles tab

Parameter	Description
Click profiles	Clicks on all of the links contained in the paragraph are allocated to the selected click profiles. Alternatively, you can allocate individual links to a click profile in the **Tracking** settings for the mailing creation wizard. You can create click profiles in the **Click profile** menu item.

Target groups tab

Parameter	Description
Target groups	If you only want the paragraph to be displayed to a certain recipient segment, select one or more target groups here. If you select multiple target groups, then only one of these target groups needs to apply (OR linking). Target groups that filter a recipient segment can be created in the **Target groups** menu item.

➜ Once you have adjusted the settings described in the table, click Apply.

✔ The Twitter paragraph is displayed in the Template Kit, but still without any loaded tweets.

To load your tweets, perform the following steps:

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1. In the menu bar of the Twitter paragraph, click .

2. Confirm that you want to load your tweets by clicking on Continue.

✔ You have now successfully loaded your tweets.

Manually update tweets

You can manually update your tweets in the Twitter paragraph and reload tweets from your Twitter timeline.

To manually update your tweets, perform the following steps:

1. In the menu bar of the Twitter paragraph, click .

2. Confirm that you want to update your tweets by clicking on Continue.

✔ You have now successfully updated your tweets.

Delete tweets

To delete individual tweets from your message, perform the following steps:

1. In the menu bar of the tweet you wish to delete, click **Delete** .

2. Confirm your selection by clicking on OK.

✔ You have now successfully deleted the tweet from the Twitter paragraph.

If you manually update your tweets in the Twitter paragraph, then previously deleted tweets will be reloaded unless the tweets were also deleted from your Twitter timeline. Also, any deleted tweets will be automatically reloaded into your message when sending if customer support has set up dynamic integration for tweets.

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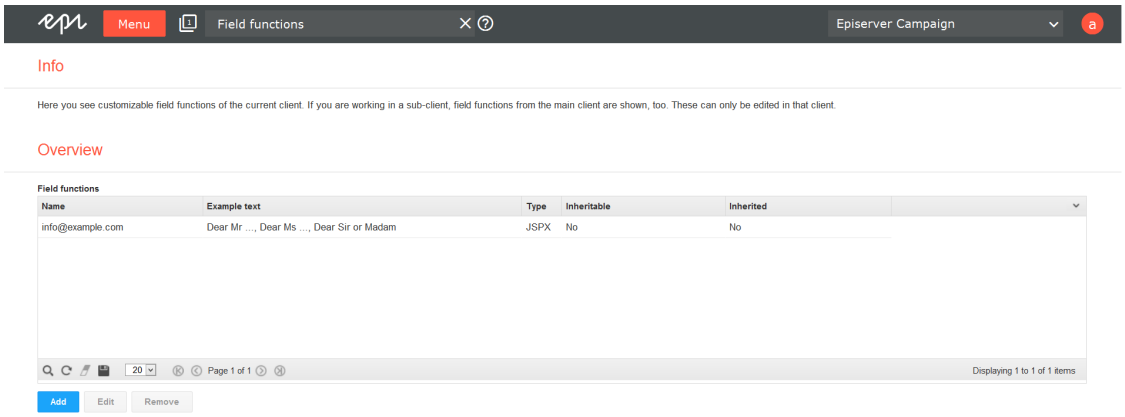
Field functions



The following documentation gives you an introduction to ODR (Dynamic Rendering) and Velocity to create your own field functions for your mailings. It provides you with basic skills and knowledge of the syntax of a ODR and Velocity function and shows some use cases. Dynamic Rendering is an XML-based script language for field functions, while Velocity is a Java based language. If you have already some knowledge of HTML/XML or Java, this may be helpful to get familiar with the language, they are necessary, though, since we give you all the basics you need to use Dynamic Rendering or Velocity. Which of the both languages you prefer is up to you, both have the same functional range.

Note on the available Dynamic Rendering and Velocity classes and operations

The special feature **Edit field functions** provides a wide range of personalization options for your mailings. Though, only classes, operations and parameters documented in this manual, are permitted for the creation of field functions. Velocity or Dynamic Rendering code that is not documented here, may interfere with or damage your mailing templates and affects the sending of mailings. Read this documentation thoroughly. Always test user defined field functions with the personalized preview. If you have any questions or doubts about the code and its correct utilization, do not hesitate to ask customer support.

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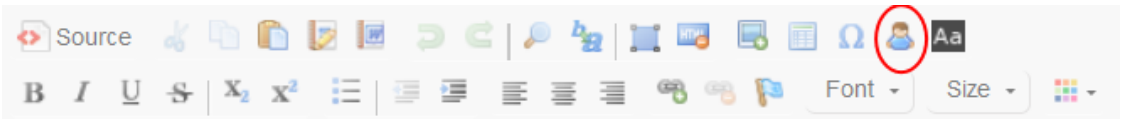
Add a field function to a mailing



In the context of a mailing (paragraph, subject etc.), field functions are inserted using a place holder in curly brackets.To add a field function to a paragraph, carry out the following steps when editing a mailing:

1. In the editor tool bar, click **Insert field function** .
2. In the dialog box, from the list, select the desired field.
3. Click OK .

Alternatively, if you know the name of a field function, simply write this name between curly brackets wherever you want the field function to appear in a mailing. When the mailing is being sent, the field function placeholder is replaced by the content the field function stands for or generates.

Use cases of field functions

Field functions are an easy way to automatically replace or personalize some content. The field function definition generates a string (some text) and inserts it in the mailing. What the actual field function does and how the generated text looks like, is defined by an algorithm. Some field functions are a simple replacement, for example they set the name or a date. Others can distinguish between different cases and replace the content accordingly. Also, field functions can be defined through target groups. These only generate some text if the recipient matches the target group. The following list gives a few typical examples of field functions:

- **Date**: When the mailing is being sent, the current date is inserted.
- **Salutation**: A salutation algorithm usually contains a salutation for male and female recipients as well as neutral salutation for those recipients whose name and gender is unknown.
- **Subject line**: A field function for the subject line can insert, for example, the name or other personalization strings.

Personalized links

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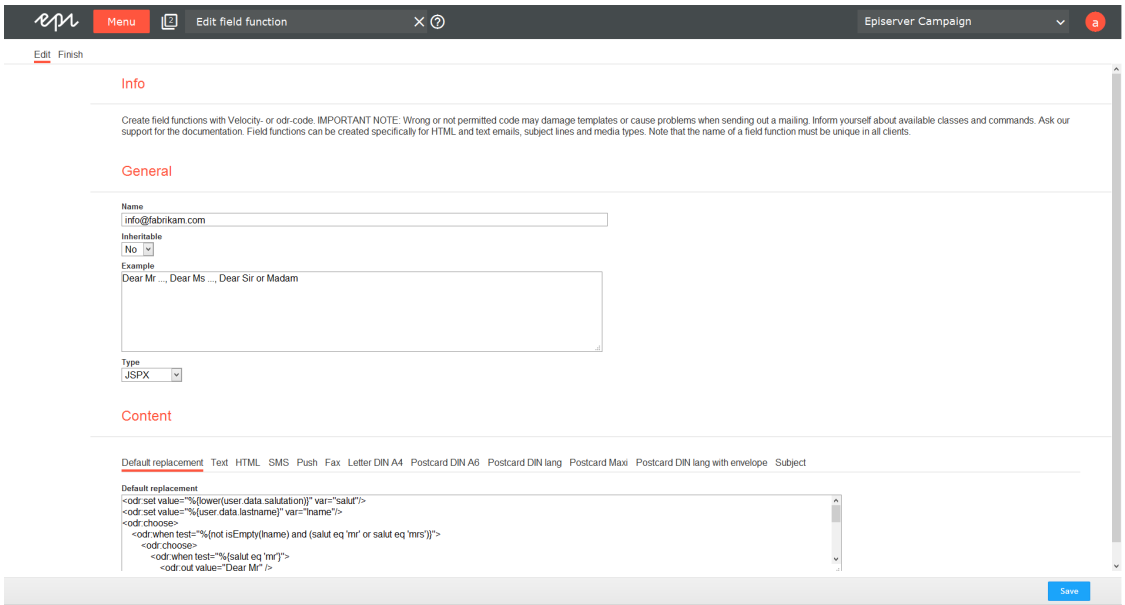
Field functions can also be used to create personalized links in your mailings. Field function place holders can be used in the domain part or path of a URL as well as in URL parameters. The link tracking of personalized links works as in regular links.

Edit field functions



To edit a field function select the menu item **Field functions** in the **Administration** menu. The overview shows all editable field functions. If you are working in a sub-client, the list also shows field functions inherited from the main client. These cannot be edited, though. Select a field function from the list and click Edit. To create a new field function, click Add. If you delete a field function, make sure it is not used in an active mailing.

In the **Inheritable** drop-down list, select if you want to make the field function available in sub-clients. User logged into a sub-client can use inherited functions, but not edit them.

In the **Type** drop-down list, select which rules will be applied for validation and execution of a field function:

Do not change the type if you are not sure, what you are doing.

- **JSPX**: This type accepts only valid XML code.
- **Velocity**: This type accepts only Velocity code.

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The **Example** box shows a replacement example. You can enter an actual example or a description of the field function, that helps other users to understand, what the field function actually does.

In the **Content** area, you can now enter the field function definition using either ODR or Velocity for each mailing type, media type or content type. This may be static text, dynamic text or both. To create dynamic content you must enter commands and queries that are executed when the mailing is being sent.

- **Default replacement**: This field contains a fallback which is applied, whenever one ore more of the specific field functions below is not defined. Also, if you do not wish or need to specify different field functions for each email type, media type and element type, just use this field and leave the others empty.
- **Text**: In this field, write the code and text for the field function to be used in the text version of a mailing.
- **HTML**: In this field, write the code and text of a field function to be used in the HTML version of a mailing.
- **SMS**: In this field, write the code and text of a field function to be used in SMS mailings.
- **Fax**: In this field, write the code and text of a field function to be used in fax mailings.
- **Subject**: In this field, write the code and text of a field function to be used in the subject line of a mailing.

Template engines

Template engines are software tools to process a field function, i.e. they read the commands written in a field function, query the requested data from the data base and create an output string.
Episerver Campaign provides two template engines – the proprietary Dynamic Rendering engine and the Velocity engine. The following paragraph introduces these two and lists the available classes and functions.

Dynamic Rendering

If your are familiar with XML and HTML tags, you will easily learn how to write field functions in the Dynamic Rendering language. The following example shows a salutation logic written in Dynamic Rendering:

```
<odr:choose>
<odr:when test="%{not empty user.data.firstname and not empty user-
.data.lastname and user.data.salutation == 'Mrs.'}">
<odr:out value="Dear Mrs. %{user.data.firstname} %{user.data.lastname},"
/>
</odr:when>
<odr:when test="%{not empty user.data.firstname and not empty user-
.data.lastname and user.data.salutation == 'Mr.'}">
```

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```
<odr:out value="Dear Mr. %{user.data.firstname} %{user.data.lastname},"
/>
</odr:when>
<odr:otherwise>
<odr:out value="Dear Sir or Madam," />
</odr:otherwise>
</odr:choose>
```

Remarks

- **Line 1**: The **choose** tag initiates a query of several parameters. It does not contain any attributes.
- **Lines 2 and 7**: The **when** tag initiates the query of a single parameter. Attributes are the parameter itself and the values. In the example, the when tag checks, whether the fields first and last name in the recipient list are not empty and whether the field **Salutation** contains *Mrs.* or *Mr.*.
- **Lines 4 and 8**: The **out** tag contains the output string. This is static or dynamic text or both, like in the example.
- **Line 12**: The **otherwise** tag defines the output string for those cases that do not match one of the previous when tags. It does not contain any attributes.

Line breaks, blank spaces and formatting with Dynamic Rendering

Line breaks and blank spaces between Dynamic Rendering tags are escaped during the rendering. Blank spaces can be inserted in the running text inside the quotation marks. HTML tags inside the Dynamic Rendering expressions (i.e. inside the quotation marks) must be written as entities. Use the following entities to escape the respective characters:

< is written as <.

> is written as >.

" is written as ".

& is written as &.

For further information about the logic and rules of XML see http://en.wikipedia.org/wiki/Xml.

Velocity

Instead of the Dynamic Rendering language you may want to write field functions in Velocity. Velocity is a Java based, so-called template engine. Velocity algorithms can appear within HTML in a mailing or

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a website. Algorithms may contain conditions and fallbacks, which generate some text if they are true and another text or no text at all if they are false.

Velocity template language

Velocity is written in its own language and inserted directly into the HTML code. Velocity references are initiated with a **$** sign, followed by a class and a function. Two simple examples may show you how to work with velocity.

Insert first and last name of a recipient in a salutation

```
Dear ${user.data.firstname} ${user.data.lastname}!
```

The expression `${user.data.[field_name]}` can be used to address any field in the recipient list. Instead of the part in squared brackets simply write the respective name of the recipient field you want to address.

If your recipient list contains recipients, whose first name is unknown, since it is usually not a mandatory field, the expression shown above needs to be extended. Otherwise it could produce a salutation like "Dear Smith!", which is not quite what you want to read in a personalized email. With velocity you can define an alternative expression, using "Dear Mrs." or "Dear Mr." plus the recipient's last name.

Salutation with complete name and fallback

To consider all possible cases, an if-then algorithm is written. This algorithm is initiated with a pound sign **#** and the command `if`. Following, the different cases and an alternative (else) are formulated. The algorithm ends with `#end`:

```
#if("$!{user.data.lastname}" != "" &&"$!{user.data.gender}" != "")Dear
#if($user.data.gender.startsWith("male"))Mr.
#if($user.data.gender.startsWith("female"))Mrs.#end $user.data.lastname
#else$!{null}Dear Sir or Madam#end$!{null}
```

Remarks

- **Line 1**: To formulate the salutation, the recipient's last name and gender must be known. In this line, the field function checks whether both exist for a given recipient.
- **Line 2**: If the gender is male, the correct form "Mr." is chosen.
- **Line 3**: If the gender is female, the form "Mrs." is chosen, followed by the recipient's last name.

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» **Line 4**: The placeholder `#else` creates a fallback, which will be used if the first condition does not match, i.e. if either the last name or the gender are not known. In this case, a neutral, general salutation is displayed.

Velocity classes and functions

Episerver Campaign provides several classes and functions which you can use to define your own field functions:

$user.data

With this function you can query all fields of a recipient list. Use this function either to insert the value of a field (e. g. the user's name) in a mailing (placeholder), or to check if the field matches a given value (if-then-function).

To insert a query and create a if-then-function, use the following expressions:

Function	Velocity code
Value equals a string value	`$user.data.[field_name] == "string"`
Value equals a numeric value	`$user.data.[field_name] == X`
Value does not equal a string value	`$user.data.[field_name] != "string"`
Value starts with a string value	`$user.data.[field_name].startsWith ("string")`
Value does not equal a numeric value	`$user.data.[field_name] != X`
Value is less than or equals a numeric value	`$user.data.[field_name] <= X`
Value is greater than or equals a numeric value	`$user.data.[field_name] >= X`
Value is greater than a numeric value	`$user.data.[field_name] > X`
Special function: Is Online Version	`$user.data.bmIsOnlineVersion`

Use the **Is Online Version** function to check, if the online version of a newsletters is currently displayed. The return value in this case would be `true`. Use this functionality to hide the link to the online version, if it is already displayed. The velocity code for this would be the following:

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```
#if($user.data.bmIsOnlineVersion)cLICK <a href="{Online-Version-Link}"
target="_blank">here</a> to read an online version of this newsletter.
```

$bmFormat

Use this class to format a value within this expression. The class enclose the value or expression to be formatted. You can only format dates and numeric values. An optional pattern or the number of decimal places (precision) can be added.

Function	Velocity code
Format as percentage	`$bmFormat.formatPercentage`
Format as currency. If the parameter **includeCurrencySymbol** is set to `true`, the currency symbol is displayed.	`$bmFormat.formatCurrency`
Format a date	`$bmFormat.formatDate`
Format a date and time	`$bmFormat.formatDateTime`
Format a time	`$bmFormat.formatTime`

Application example

```
You registered with us on $bmFormat.formatDate($user.data.created)
```

Attributes for formatting numeric values

Attribute	Description
pattern	Formats numeric values according to a specific pattern, e.g. **###,###,###.##** or **000000.000**. # stands for a digit, 0 for leading or trailing zeros. The dot indicates a decimal separator and can only appear once in the pattern. The comma is used is used as a grouping symbol and can appear any number of times, except after the decimal point where it may not appear at all. **Note**: The output that this later creates will have numeric values appear with German formatting, i.e. the grouping symbol (comma in the pattern) is displayed as a dot and the decimal separator (dot in the pattern) is displayed as a comma—for example "1.000,00". English formatting (e.g.

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<table>
<tr><th>Attribute</th><th>Description</th></tr>
<tr><td></td><td>"1,000.00") is not supported.

Examples for the value 1000:

<table><tr><td>Pattern</td><td>Output</td></tr><tr><td>###,###,###.##</td><td>1.000</td></tr><tr><td>000,000,000.00</td><td>000.001.000,00</td></tr><tr><td>##,##.0###</td><td>10.00,0</td></tr><tr><td>###.###.###.##</td><td>✘ invalid, there are too many dots</td></tr><tr><td>###.###,##</td><td>✘ invalid, the comma appears after the dot</td></tr></table>
Further information about formatting numbers can be found in the Java documentation from Oracle.

Date information can e.g. be formatted using the pattern <code>dd.MM.yyyy</code>. Time information using e.g. <code>hh:mm:ss</code>. Further information about formatting dates can be found in the Java documentation from Oracle.</td></tr>
<tr><td>precision</td><td>Integer value that specifies the number of decimal places to which the output value should be rounded.</td></tr>
</table>

$bmMimeType

Use this class to query the mime type of the mailing that is currently rendered.

Mime Type	Velocity code
Plain text emails	`$bmMimeType == "text/plain"`
HTML emails	`$bmMimeType == "text/html"`

$filter

With this class, a target group can be invoked. The submitted string must match a target group ID of your Episerver Campaign client. To get the IDs of your target groups, ask our support. Do not use an ID, if you are not sure that it matches a target group, otherwise your template will not work properly. The velocity code for this function is as follows:

```
$filter.filterByRevisionedFilter
```

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Hints for using velocity

Read the following carefully, since they give you some important hints that held to avoid unexpected results and errors. The example given in the Velocity chapter is used to point out notation of operators and the insertion of velocity code in continuous text. Follow the instructions given in this chapter always when writing Velocity code:

```
#if("$!{user.data.lastname}" != "" && "$!{user.data.gender}" != "")Dear
#if($!user.data.gender.startsWith("male"))Mr.
#if($!user.data.gender.startsWith("female"))Mrs.#end $user.data.lastname,
#else$!{null}Dear Sir or Madam#end$!{null}
```

Remarks

- **Line 1**: If you formulate an **"#if"** operation, always use the special operator `$!`. Otherwise, if the variable was not defined, Velocity would read the variable's name as a string (and not its value, since there is none) and, when an expression "does equal" is formulated, the result would be always false, since the string is always unequal to a non existing value. The special operator **"$!"** suppresses this expression if the variable it is not defined. The whole expression is wrapped in quotation marks. If a field is not defined at a recipient, a query would deliver the result NULL. The quotation marks transform this into an empty string, which can be validated with conditions of the type `=""` (is empty) or `!=""` (is not empty).
- **Line 4**: If Velocity commands are inserted directly into continuous text, space characters after such commands are ignored. This may cause text that follows a Velocity command to be interpreted together with the command. The result is a syntax error. To avoid such errors, a NULL object must be inserted between the Velocity command and the text: `$!{null}`. This object does not generate any output but closes the preceding command.
- **Line 4**: Always close Velocity-Code with the Tag `#end`. After this tag, insert a line break.

Coupon system

Episerver Campaign can be extended with a coupon system to send coupon codes with your mailings that may be redeemed by recipients in your online shop. Coupon codes are grouped in blocks. In a mailing, these blocks can be integrated using a placeholder. The allocation of coupon block, coupon code, mailing and recipient is described in the Assignment section. Coupon codes can be added

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manually to a coupon block or automatically be generated. In addition, you can display coupon codes as machine-readable bar codes.

The coupon system is managed using the Episerver Campaign user interface or the SOAP API with the services CouponBlockWebservice and CouponCodeWebservice.

Assignment

During dispatch, every coupon code – no matter if generated statically or dynamically – is assigned to the respective mailing and recipient (the so-called MailingToUser ID). This ensures that each coupon code of a coupon block is sent only once. Even if you insert two place holders for coupon codes from the same block in a mailing, it will display the same code twice and therefore "consume" only one coupon code. In contrast, if several mailings with coupon codes from the same coupon block are sent to a recipient, the recipient will then receive several coupons.

➜ In the Manage coupon blocks window, click Download assignments to download the assignment of sent coupon codes in a CSV file.

✔ The file contains the coupon block ID, the coupon code, the recipient ID (generally the recipient's email address), the recipient list ID, the ID of the mailing along with the creation and modification date of the mailing.

Insert coupon codes in a mailing

To send coupon codes in a mailing, insert the corresponding placeholder where the coupon code has to be displayed. You can also find the placeholder in the “Details” area of the “Manage coupon blocks” window.

```
{Coupon Block:12345678901}
```

You can use several coupon blocks in a mailing if you wish to send several coupons in an email. However, if you simply insert a placeholder several times in a mailing, only one coupon code will be sent (see the Assignment section). The coupon code is displayed as plain text in the email.

For special occasions, such as birthday mailings, you can insert the coupon code in an image using image personalization.

Test emails

By default, the use of valid coupon codes in test emails is disabled. In such cases, a special placeholder with no function replaces the active coupon code.

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To enable real purchases for test cases, select the check box Use valid coupon codes in test emails in the details of a coupon block or when creating coupon blocks.

Manage coupon blocks

Coupon codes are organized using coupon blocks. Coupon blocks are containers for coupon codes. For example, you can create a coupon block for any purpose. Coupon blocks are managed on a client level, so you can use one and the same coupon block in multiple mailings in your client. It is also possible to send several coupon codes from different coupon blocks in a single mailing. The recipient then receives an email with several coupon codes that each originate from a different coupon block. In contrast, a mailing may only contain one single coupon code from the same coupon block. A recipient can, however, receive several coupon codes from the one and the same coupon block if these are sent in separate mailings.

➜ To manage and edit coupon blocks, open the start menu and in the **Special** menu, click **Manage coupon blocks**.

✔ A new window opens that shows you all existing coupon blocks.

➜ In the list, click a coupon code to display its details:

- **Name**: This name is internally used by the coupon code system.
- **Field function**: Use this placeholder to use the coupon block in a mailing.
- **Type**: Coupon blocks can be of the type **Static**, **Generated** or **EAN-13 bar code**.
- **Created**: The creation date of the coupon block.
- **Last modified**: The modification date of the coupon block.
- **Total coupon codes**: Indicates the total number of codes a coupon block actually contains (for static and EAN-13 bar code blocks) or how many codes already have been generated (for generic blocks).
- **Free coupon codes**: Indicates the total number of free codes a coupon block contains. For generated coupon blocks the value is infinite.
- **Use valid coupon codes in test emails**: Select this check box to use valid coupon codes in your test emails.

Use the buttons below the list to perform the following actions:

- Create
- Delete block
- Delete unused codes
- Import codes
- Download assignments
- Download codes

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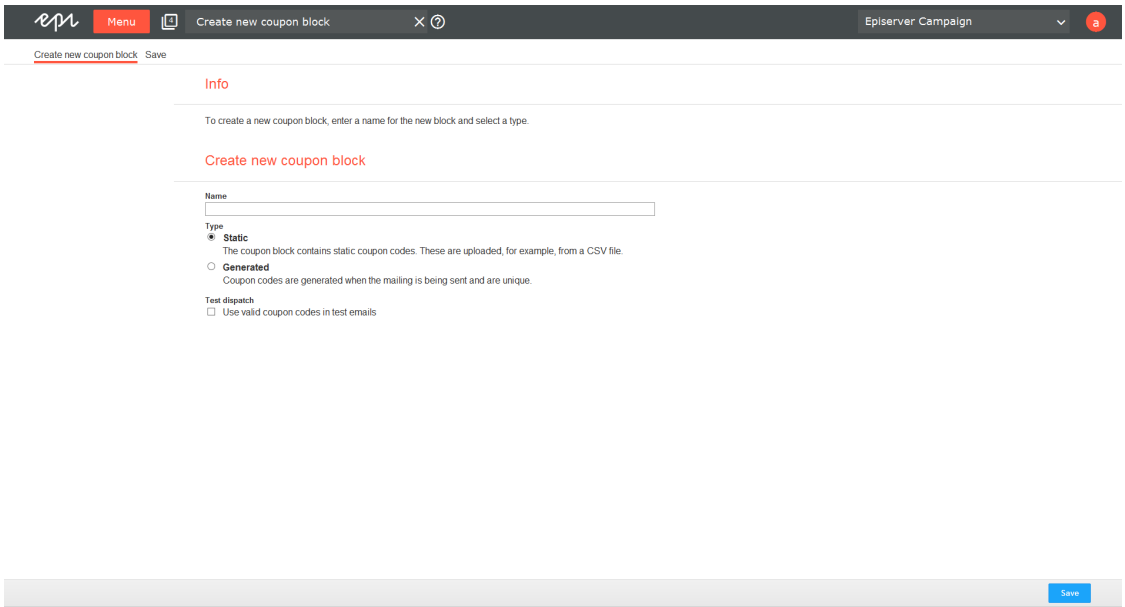
- Edit thresholds
- Edit bar code coupon block

Create



To create a new coupon block, perform the following steps:

1. Click **Create**.
2. In the **Name** box, enter a descriptive name for the coupon block, so that you can identify it easier later.
3. In the **Type** area, select one of the following coupon block types:
   - **Static**: Static coupon blocks are suitable in instances such as when you want to release only a limited number of coupon codes and/or when you wish to generate the coupon codes from your own CMS. Static coupon blocks are imported into Episerver Campaign in CSV file format. The CSV file should only contain a single column containing the coupon code. To manually import coupon codes in a block, perform the steps described in the Import codes section.
     Automatic imports are performed after a cron job has been configured to regularly (e.g. daily) check whether new coupon blocks are available on your system and to upload the CSV file from a SCP server. Contact our customer support if you want to use this option.
   - **Generated**: Dynamically generated coupon blocks are generated by Episerver Campaign and are generally not limited. This means that any number of coupons can be generated with one coupon block. The coupon codes are dynamically generated during the dispatch of the emails.

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- **EAN-13 bar code**: Bar code blocks convert a 13-digit code number into a machine-readable bar code and insert it as a graphic into a mailing. As with the other types, the coupon system ensures that bar codes are unique and are used only once. The encoding of the bar code conforms to the EAN-13 specification. Note that no items are encoded, but a unique code is assigned to each recipient. To manually import coupon codes into an EAN-13 bar code block, perform the steps described in the Import codes section.

4. To use valid coupon codes in your test emails, select the **Use valid coupon codes in test emails** check box.
5. Click Save.

Delete block

In the overview, click the coupon block you want to delete, then click Delete block and afterwards, click Delete.

Already used but not yet redeemed codes in this block will remain valid.

Note that when deleting a coupon block, the histories and any assignments are lost.

Delete unused codes

In the overview, click the coupon block you want to empty and then click Delete unused codes. All existing but as yet unused codes are then deleted, but the coupon block itself remains intact.

Afterwards, you can add new coupon codes to the block.

Unused codes can only be deleted in static and bar code coupon blocks.

Import codes

To import coupon codes into a coupon block, perform the following steps:

1. In the overview, click the coupon block in which you want to import code s and then click Import codes.

The **Upload coupon codes** window opens.

2. Click Browse... and select the CSV file from your hard drive that contains coupon codes to be imported. The CSV file should contain only one column with the coupon codes.
3. Click Preview.

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→ 4. In the **File charset** drop-down list, select the encoding used in the CSV file. If you are not sure about this, select the Auto value to automatically select the encoding.

→ 5. In the **Column delimiter** drop-down list, select the character (semicolon, comma, tabulator etc.) that separates the data fields on the individual lines of the uploaded file. In most cases this will be a semicolon.

→ 6. In the **Escape character** drop-down list, select the character with which each individual data field is enclosed. Some database programs use a single quote (') or double quote (") around each data field when exporting. In most cases you will be using the double quote.

→ 7. If the CSV file contains a header, in the **Skip first row** drop-down list, select **Yes**.

→ 8. Optionally, in the **Maximum number of rows to preview** drop-down list, you may select the number of records to be displayed in the preview .

→ 9. Click Refresh preview to reload the records.

→ 10. Click Import coupon codes.

✔ The last tab shows how many codes were imported.

After the import, the coupon block is ready for use. To learn how to define the minimum number of codes for that block, see the Edit thresholds section.

Automatic imports are performed after a cron job has been configured to regularly (e.g. daily) check whether new coupon blocks are available on your system and to upload the CSV file from a SCP server. Contact our customer support if you want to use this option.

Bar code coupon codes

Codes for bar code coupon blocks must consist of a 13-digit number and must only contain digits.

Download assignments

→ To download a CSV file containing the already used coupon codes and their corresponding mailing and recipient assignments, in the overview, click the desired coupon block and then Download assignments.

Download codes

→ To download all codes of a coupon block, in the overview, click the desired coupon block and then Download codes.

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Due to their inherent unlimited nature, it is only possible to download the list of used coupons as a CSV file for dynamic and EAN-13 bar code coupon blocks.

Edit thresholds

If you are using static or EAN-13 bar code coupon blocks, you must ensure that sufficient coupon codes are available for all recipients. Depending on the type of mailing, Episerver Campaign uses several security questions.

To define the threshold values, perform the following steps: in the **Configuration** area of the **Manage coupon blocks** window:

1. In the overview, click the coupon block whose thresholds you want to edit and then click Edit thresholds.
2. In the **Warning threshold for transaction mailings (integer value)** box, enter an integer warning threshold value for transactional mailings. If this threshold is undercut, a notification email is sent, but the sending continued. You should then upload new coupon codes.
3. In the **Abort threshold transaction mailings (integer value)** box, enter an integer threshold value for transactional mailings. If this threshold is undercut, a notification email is sent and dummy coupon codes without any function are used in the mailing. You must then upload new coupon codes.
4. In the **Warning threshold regular and special mailings (percent)** box, enter the percentage of recipients for which the coupon block must still contain coupon codes after sending. If this threshold is undercut, a notification email is sent, but the sending continued. You should then upload new coupon codes.
5. In the **Abort threshold regular and special mailings (percent)** box, enter the percentage of recipients for which the coupon block must still contain coupon codes after sending. If this threshold is undercut, the sending is cancelled. You must upload new coupon codes before you can restart the mailing.
6. In the **Email address(es)** box, enter one or more email addresses to which a notification email is sent if a threshold value is undercut.
7. Click Save.

Threshold usage

For triggered mailings (e.g. birthday mailings), the coupon system uses the thresholds for regular mailings. For transactional mailings sent using the HTTP API or Marketing Automation, the coupon system uses the thresholds for special mailings.

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Edit bar code coupon block

To edit a bar code coupon block, perform the following steps:

1. In the overview, click the coupon block you want to edit and then click Edit bar code block.
2. You can specify the size of the bar code coupon block either through the height and width or through the line thickness :
   - In the **Size options** drop-down list, select **Height and width** and enter the desired values in pixels.
   - In the **Size options** drop-down list, select **Line thickness** and then in the **Line thickness** drop-down list, select a value between 1 pixel and 10 pixels.

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Countdown timers

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Count down the time until your top offer runs out and bring life to the inboxes of your customers with the countdown timer by Episerver Campaign. Grab your recipients' attention and increase conversion rates.

All in real time. The countdown timer by Episerver Campaign displays the number of days, minutes, hours and seconds currently remaining on an offer – regardless of when a recipient opens your newsletter. The pressure to act fast is real. And your offer will always be transparent, because late recipients can see in real time when your promotion ends.

We have developed the countdown timer to be dynamic, agile and flexible. The timer itself and the graphic layout can be customized according to your wishes and your corporate identity. But most of all: According to your creative ideas.

Set up countdown timers

➜ To set up the countdown timers, contact the Episerver customer support team, who will be happy to enable this feature.

✔ Once the countdown timer has been enabled for your user account, you will find the feature in the start menu under **Special**.

On the following pages, you can learn how to graphically design your top offers with countdown timers and incorporate them into your messages. If you encounter any problems, see the Troubleshooting countdown timers section of this chapter.

If you are still not familiar with the general functionality of countdown timers, first read the How it works section.

How it works

The countdown timers by Episerver Campaign support two types of countdown timers:

1. animated countdown timer with live countdown
2. non-animated countdown timer with static display of time remaining

If you integrate a non-animated countdown timer into your mailing, when the recipient opens your mailing, an image with the currently remaining time will be generated, loaded into your mailing and displayed. The display of the remaining time is static: the digits do not change.

On the other hand, if you incorporate an animated countdown timer into your mailing, the counter will be active in your top offer for 60 seconds. Animated countdown timers use the GIF (Graphics Interchange Format) image format. With this format, multiple single images are saved into a single file and run in an automated sequence. This way, your newsletters will contain a ticking clock.

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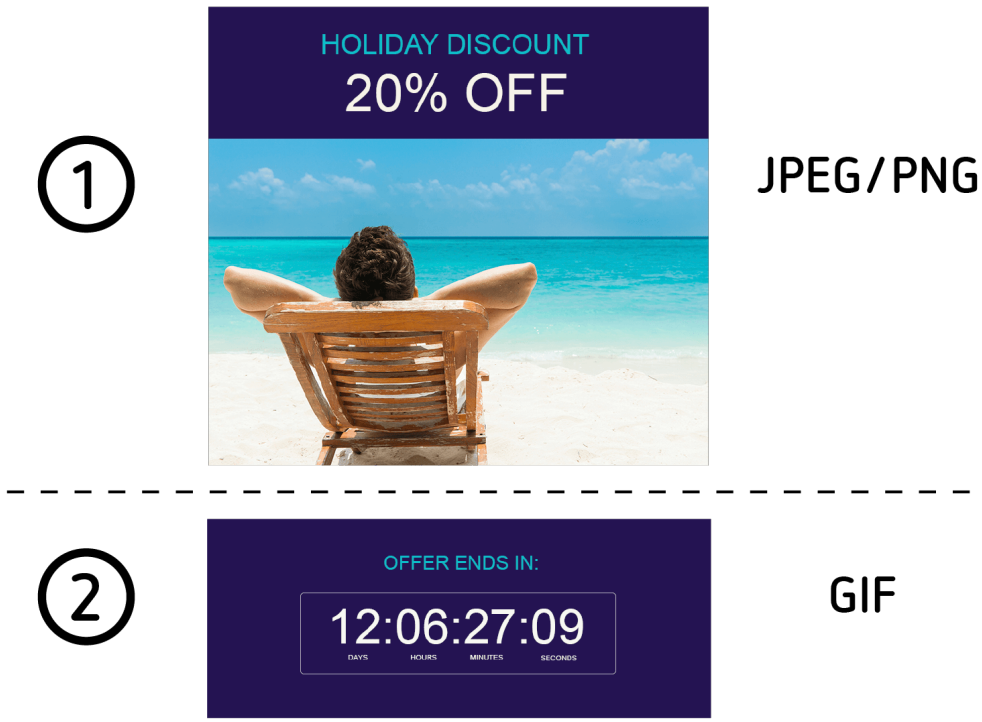
The duration of the animation is limited to 60 seconds, since many email clients do not support longer animations.

One obstacle remains, however: the file size of the GIF animation. If your countdown timer e.g. uses a complex graphic design for its background, your animation can easily require several megabytes – too much for a newsletter and too much for the inbox of your recipients.

So that your message contents can always be shown to your recipients without any delays, the countdown timer file size is limited to 1.5 megabytes.

This does not mean that you cannot have an appealing design. There is a little trick that can be used to design consistent and attractive layouts while at the same time keeping the file size small.

Here's how it works: You break your product offer into two parts that you bring back together later when designing your message. You save the product image and/or your key visual as a normal image file (JPEG or PNG) and you save the counter as a GIF animation in Episerver Campaign.



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In the following, we use a practical example to show you the basic procedure for breaking a product offer with a countdown timer into two parts and then bringing them back together into a single graphic in your message. You can then apply this basic method to your own ideas.

Prepare graphics

Whether you are working on a background graphic, a background photo or simply on the timer: there are practically no limits on how you can use your imagination to visually design your top offer with a countdown timer. In the following, you can learn by example how to prepare your layout for a countdown timer.

If you simply want to insert the timer, without a graphic or photo into your message, you can skip this section and jump straight to the next chapter: Countdown timers.

Requirements

To design and prepare a countdown timer with a background graphic or a background photo, you will need the following:

- image editing software, such as Adobe Photoshop
- a product image or key visual

Example

To create a countdown timer with a background graphic or a background photo, you need to prepare two parts (see the How it works section):

- the product image or key visual
- the graphic on which the timer will later be placed

To prepare each of these parts, perform the following steps:

1. Open your product image or key visual with an image editing program.
2. Make sure that the width of your product image or key visual is no larger than 800 pixels and no smaller than 100 pixels. Adjust the image width as necessary.

Episerver Campaign supports a maximum value of 800 pixels with a minimum value of 100 pixels. The actual maximum value available to you can deviate greatly, however. This depends on the respective maximum value of your message template or paragraph, into which you later wish to insert the countdown timer. If your message template or paragraph is (for example) limited to a width of

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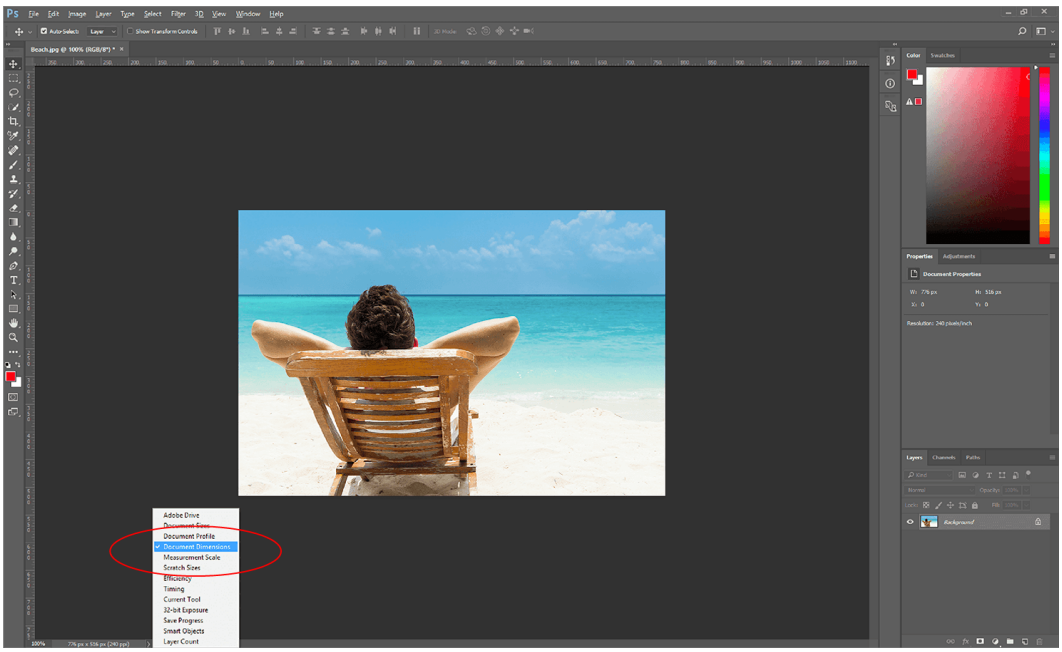
600 pixels, do not exceed this value. Later, the countdown timer created will not be automatically scaled to the maximum value of your message template or paragraph.



✔ In our example, the image width is 776 pixels. This may exceed the width available to you in your specific message template or paragraph.

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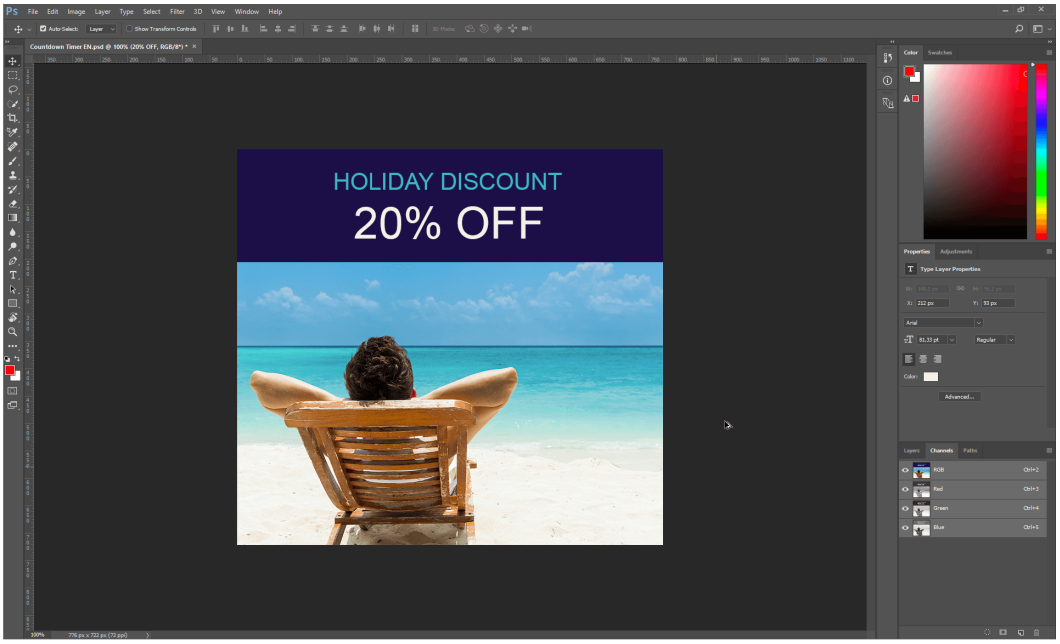
3. Optional: Insert additional graphic elements into your image.



In our example, we have inserted a blue banner and a headline.

4. When you are finished with designing your product image or key visual, export the image as a JPEG or PNG.

5. In the next step, create the area for the countdown timer, in other words the second part of your offer graphic, which will later count down the days, hours, minutes and seconds remaining in your offer in real time, as an animated GIF. For this area, you can start with a new graphic file or continue working with your finished product image/key visual using the file in your image editing program (not in the exported JPEG or PNG!) and later only export the countdown timer area.

Make sure that the height and width of the area for the countdown timer are neither greater than 800 pixels nor less than 100 pixels, and that it fits within the maximum and minimum values for your specific message template or paragraph.

We recommend continuing to work on the product image/key visual file. This makes it easier to see what the final result will look like, as well as how both parts will work together in your message.

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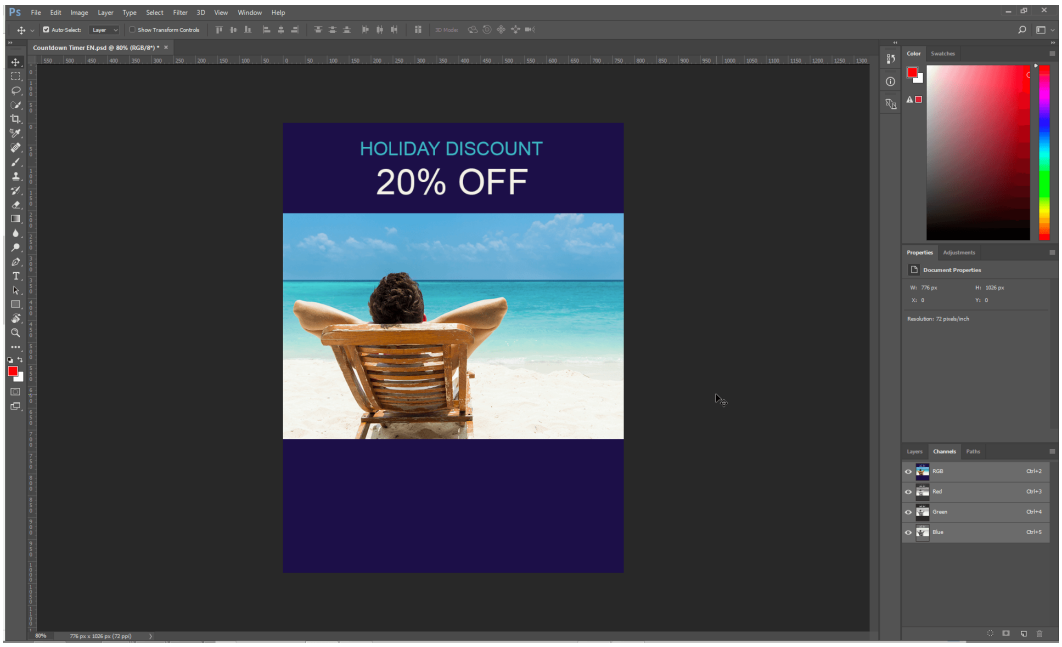

✔ In our example, we continue to work with the PSD file in Adobe Photoshop, and insert a blue banner below the key visual.

When creating an animated countdown timer

For the countdown timer area, avoid using complex graphic designs such as patterns, photo scenes, many colors, color gradients etc. The reason: Your JPEG or PNG will later be converted by Episerver Campaign into a GIF animation with 60 individual images. This GIF animation may not exceed 1.5 MB. Even if you use a highly compressed JPEG with a file size of only a few KB, but it contains a large number of colors, the subsequently generated GIF animation may exceed the maximum size of 1.5 MB.

When creating a static, non-animated countdown timer

The maximum file size for the countdown timer area is 500 KB.

→ 6. To test the positioning of the countdown timer, which will come later, create a test timer with the testing tool for your image editing program.

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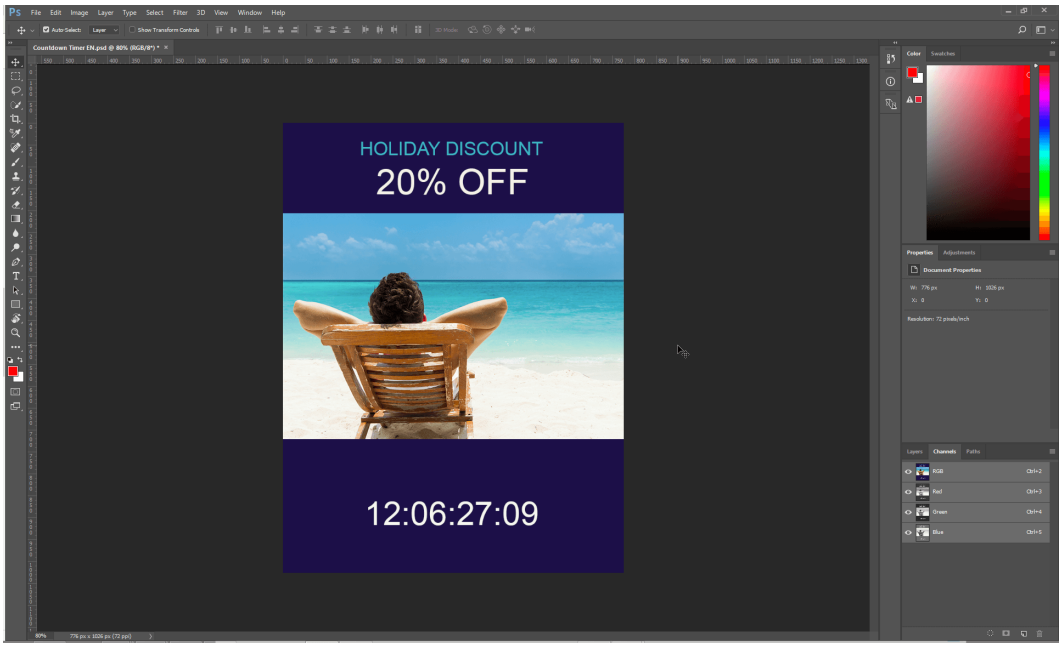

You can select among the following formats:

Static countdown timers

- Days, hours, minutes, seconds (written as dd:hh:mm:ss)
- Hours, minutes, seconds (written as hh:mm:ss)
- Days, hours, minutes (written as dd:hh:mm)
- Hours, minutes (written as hh:mm)
- Days only (written as dd)

Animated countdown timers

- Days, hours, minutes, seconds (written as dd:hh:mm:ss)
- Hours, minutes, seconds (written as hh:mm:ss)

The following fonts/typefaces can be used:

Font/typeface				
Arial	Arial bold	Arial italics	Arial black	Arial Unicode

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Font/typeface			
			MS
Comic Sans MS	Comic Sans MS bold		
Courier New	Courier New bold	Courier New italics	Courier New bold and italics
Times New Roman	Times New Roman bold	Times New Roman italics	Times New Roman bold and italics
Trebuchet MS	Trebuchet MS bold	Trebuchet MS italics	Trebuchet MS bold and italics
Verdana	Verdana bold	Verdana italics	Verdana bold and italics

Take note of the font and the hexadecimal code for the font color that you use. You will need this information later.

✔ In our example, we have used the Arial font with the color white (hexadecimal code #FFFFFF).

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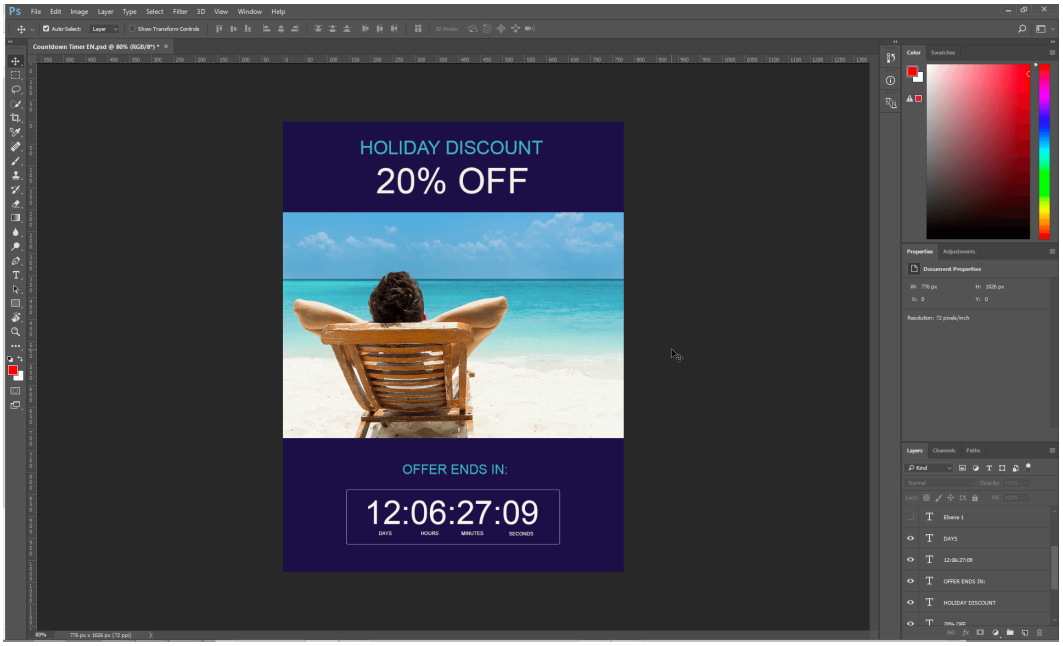
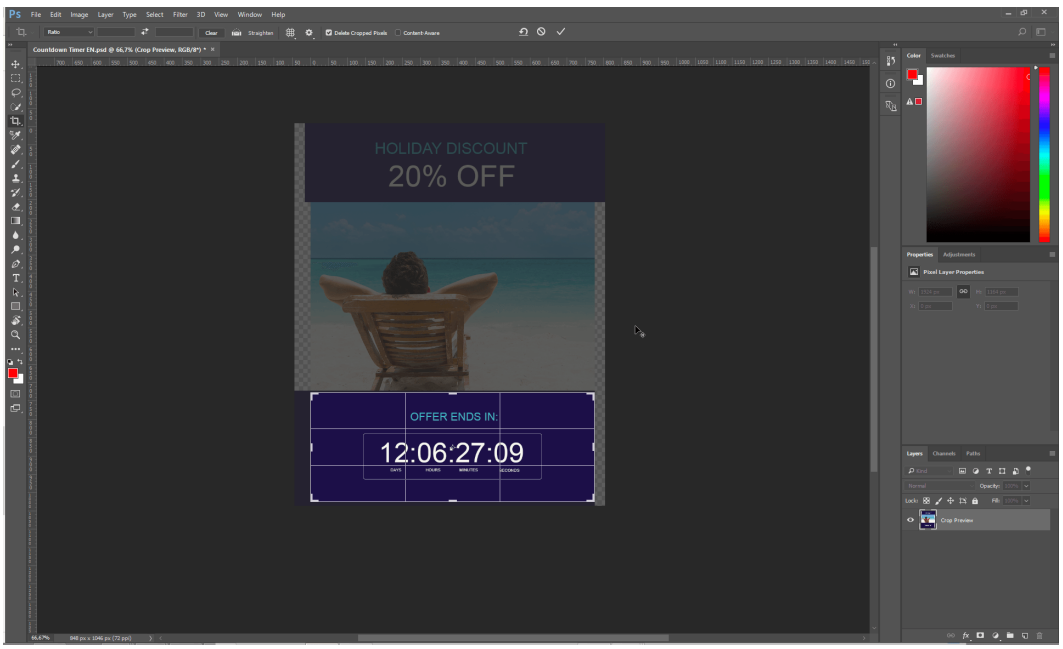
7. Optional: Insert additional graphic elements into your test timer.



In our example, we have placed a border around the timer, labelled the timer with "days", "minutes", "hours" and "seconds", and inserted the text "Offer ends in:".

8. If you are satisfied with your layout, remove the key visual from your graphic so that the area for the countdown timer stands alone. In Adobe Photoshop, for example, this can be accomplished using the crop tool.



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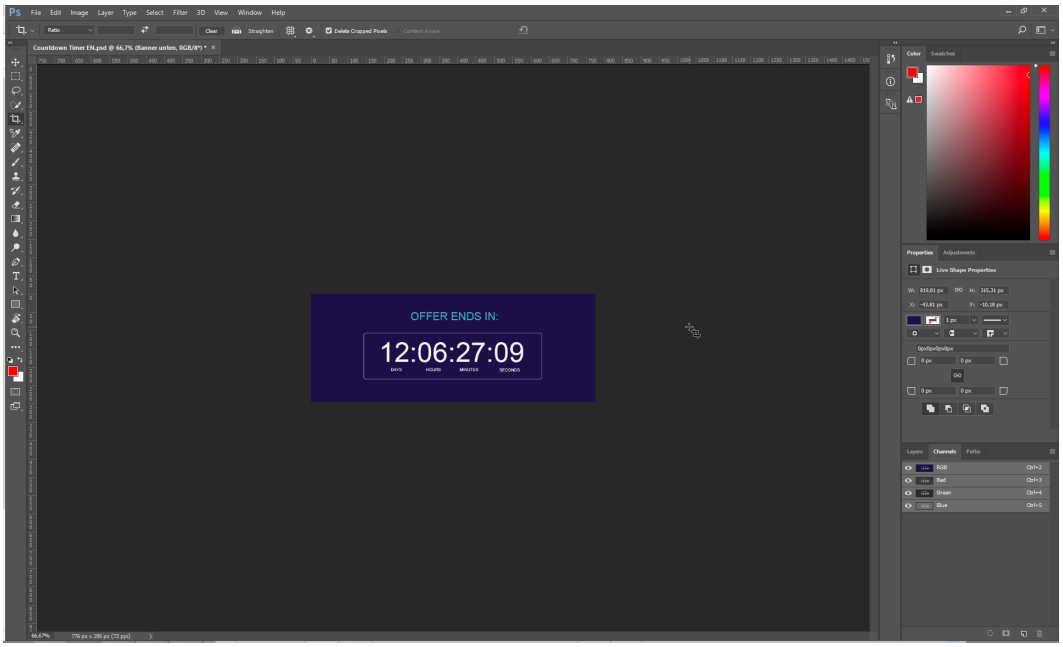
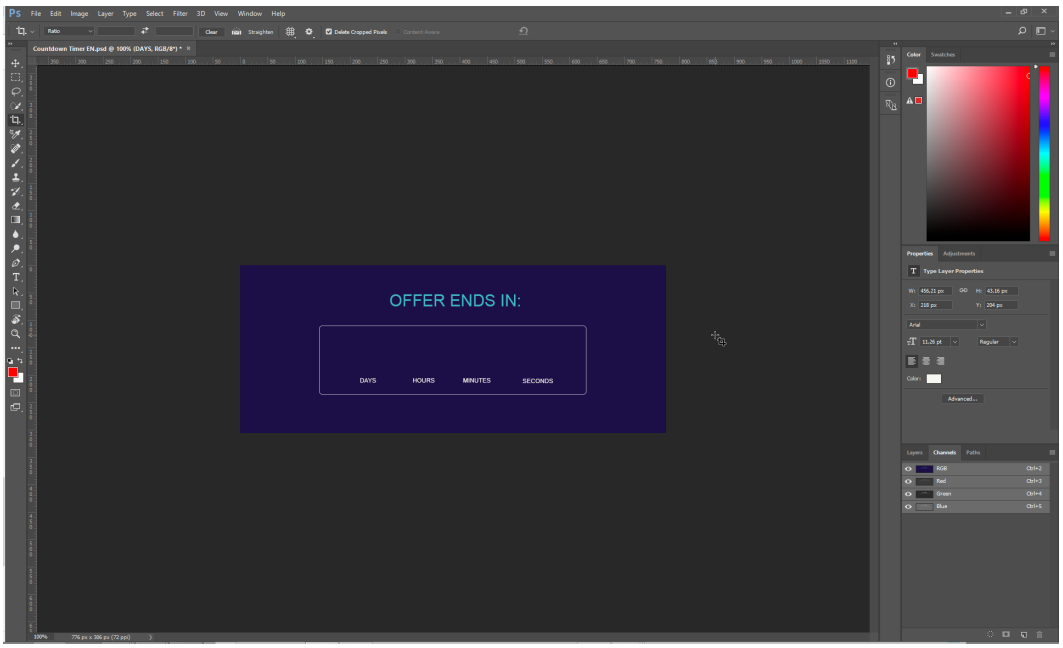


✔ In our example, we have used the crop tool to reduce our graphic to the area with the timer.

➔ 9. Remove the test timer by deactivating or deleting the corresponding layer. If you have inserted any other graphic elements, leave them activated.



✔ In our example, in Adobe Photoshop we have deactivated the layer with the test timer. We have left the border, the timer labels and the lines of text active.

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Insert the final timer later in Episerver Campaign using the information you recorded regarding font and font color. The graphical representation of the area that you have created will later serve as the background for the final timer.

→ 10. Export the area or background for the timer as a JPEG or PNG. Make sure that the file size does not exceed 20 KB (approximate value). When creating a static, non-animated countdown timer, the maximum file size is 500 KB.

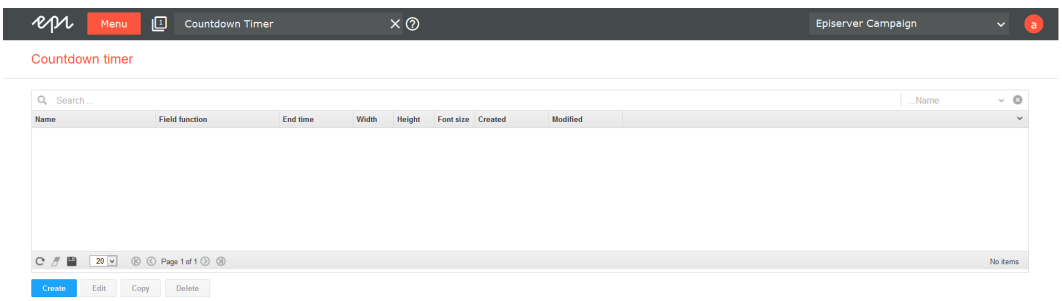
✔ You have now successfully prepared both parts of the countdown timer. In the next section you will learn how to create the final timer in Episerver Campaign and place it on your background graphic.

Create a countdown timer

If you have only prepared the two graphic parts of your top offer (the product image/key visual and the timer area) (see Prepare graphics), or you now wish to insert only a simple timer without graphic design into your message, you can create the counter for the countdown timer in Episerver Campaign. To do this, perform the following steps:

→ 1. Open the start menu and, under **Special**, click **Countdown timer**.

✔ The **Countddown timer** window opens.



→ 2. Click Create.

✔ The **Create countdown timer** window opens.

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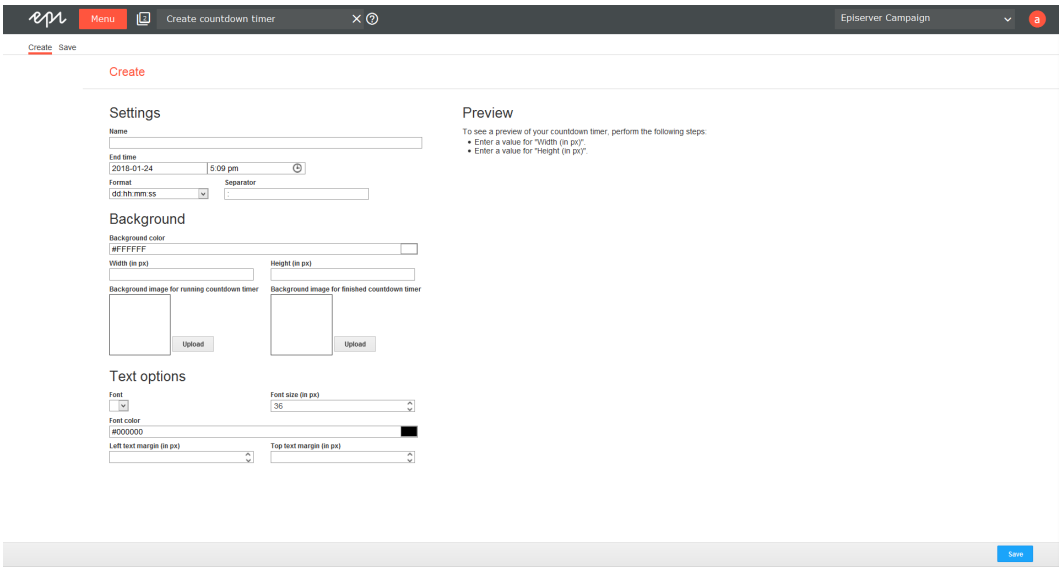

3. In the **Name** box, enter a name for your countdown timer.

4. In the **End time** box, enter the date (left part of the box) and the time (right part of the box) on which your countdown timer will ends.

5. In the **Format** drop-down list, select the timer format. You also need to select here whether your countdown timer will be animated or non-animated.

If you decide to use **animated**, the countdown timer will visually count down in your message. If you decide against **animated**, a static timer will be displayed for your recipients. This shows the actual time remaining as of the time that the message was opened, however the digits do not change as they do for an animated countdown timer.

6. In the **Separator** box, enter the separator that you want to use between the counter digits.

By default, the colon is used as the separator. You can use a string of up to 5 characters as a separator between the digits. If you do not want to use a separator between the digits, enter a space in the field.

7. In the **Background color** box, select a background color for the timer by entering a hexadecimal value or alternatively by setting a color value using the color selection tool. If you have prepared graphics for the countdown timer, you do not need to enter a background color. The timer will then be automatically set to have no background color for your background image.

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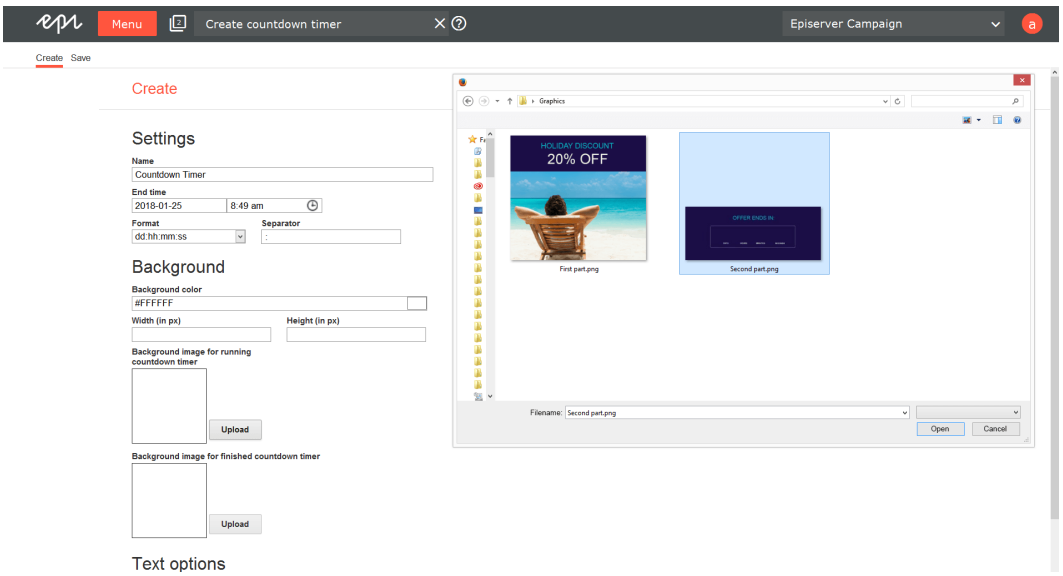
8. In the **Background image for running countdown timer** area, upload a prepared background image (in JPEG, PNG, BMP or GIF format with height and width values of at least 100 pixels and no more than 800 pixels) by clicking Upload and selecting an image in the file browser.

Make sure to follow the design guidelines for background images.

If you have followed the example in the Prepare graphics section: now upload the second part of your top offer into the area you have created for the timer. You will use the prepared product image/key visual later, then you will combine the product image/key visual and the finished countdown timer into a single graphic and insert it into your message (see Insert a countdown timer into a message section).



9. In the **Background image for finished countdown timer** area, you may optionally upload a background image (in JPEG, PNG, BMP or GIF format with height and width values of at least 100 pixels and no more than 800 pixels) to be displayed in your messages when the countdown timer has run out by clicking Upload and choosing an image in the file browser. If you do not upload a background image in this area, when the time has run out, the background image for running countdowns will be displayed with all digits set to zero.

10. In the **Width (in px)** box, enter the width of the timer background. If you have uploaded a background image, the width of the uploaded background image is automatically entered here and the option of making a manual entry will be blocked out.

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11. In the **Height (in px)** box, enter the height of the timer background. If you have uploaded a background image, the width of the uploaded background image is automatically entered here and the option of making a manual entry is blocked.
12. In the **Font** drop-down list, select the font and the font style for the digits of the timer.

If you have followed the example in the Prepare graphics section: now enter the font here that you used for the test timer in your image editing program. In our example, we used the Arial font.

13. In the **Font size** box, enter the font size of the timer in pixels (px). Choose a font size of at least 12 px.

If you have followed the example in the Prepare graphics section: now enter the font size here that you used for the test timer in your image editing program. In our example, we used the font size 75 px.

There are three ways to enter the font size or to increase or decrease it:

- by entering the digits with your keyboard
- by using the arrow keys on your keyboard (up and down)
- by clicking the arrow on the right side of the box

14. In the **Font color** box, enter the font color for the timer as a hexadecimal code or use the color selection tool.

If you have followed the example in the Prepare graphics section: enter the font color here that you used for the test timer in your image editing program. In our example, we used the font color white, which has a hexadecimal code of `#FFFFFF`.

15. In the **Left text margin (in px)** box, enter the distance in pixels between the timer to the left edge of the image. Use the preview to review the desired placement of the timer.

There are three ways to enter the margin size or to increase or decrease it:

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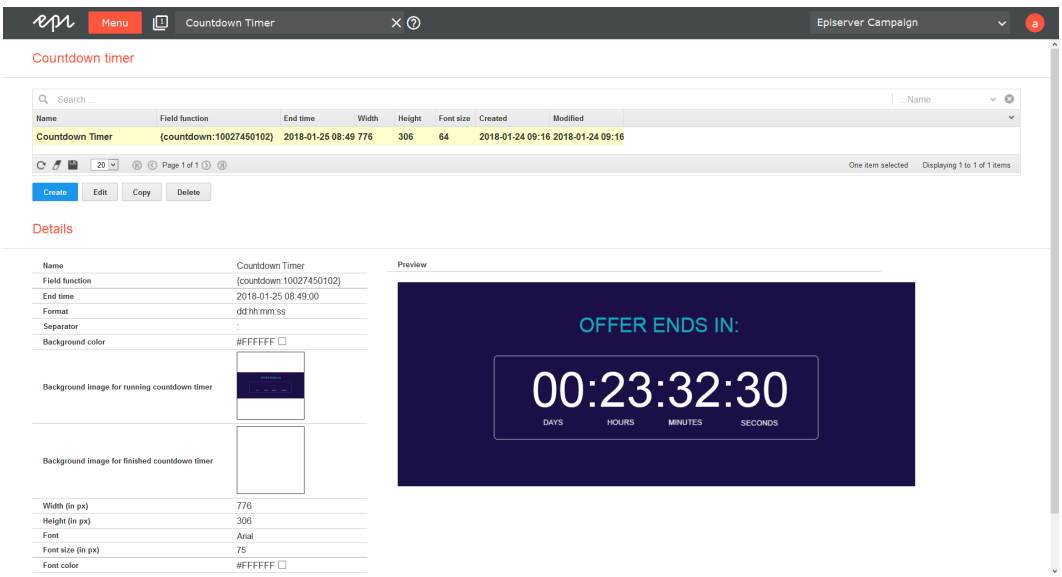
- by entering the digits with your keyboard
- by using the arrow keys on your keyboard (up and down)
- by clicking the arrow on the right side of the box

16. In the **Top text margin** box, enter the distance in pixels between the timer and the upper edge of the image. Use the preview to review the desired placement of the timer.
17. Click Save.

✔ You have successfully created a new countdown timer. The message The changes were successfully saved." appears.

18. Click Close.

✔ The **Countdown timer** window opens. If you select a created countdown timer from the list, a preview of the countdown timer is shown.



Insert a countdown timer into a message

Your finished countdown timer will be inserted into your message using a field function. You can insert the countdown timer on its own into your message or you can combine it with a product image/key visual to make a single graphic.

Insert a freestanding countdown timer using a field function

To insert a freestanding countdown timer into your message using a field function, perform the following steps.

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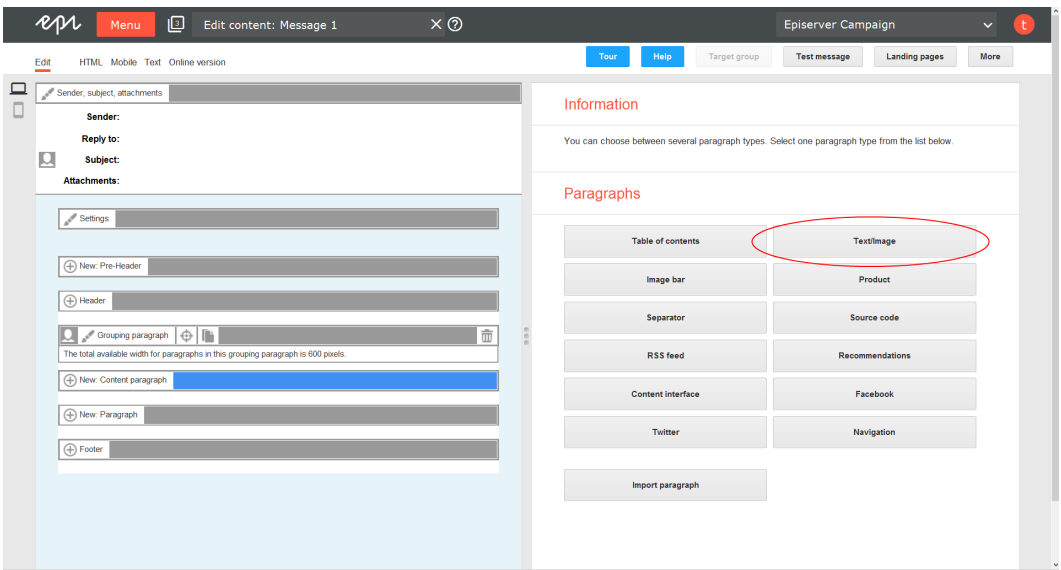
In the following step-by-step instructions, we will show you the procedure using the Template Kit. If you use a custom template, the specific steps may differ in their details.

1. In Episerver Campaign, switch to the **Edit content** window for your message.
2. Create a new content paragraph in your message by clicking New: Content paragraph.

✔ On the right-hand side, a window for selecting the paragraph type opens.

3. Click Text/Image.



✔ The configuration window for the selected paragraph type opens.

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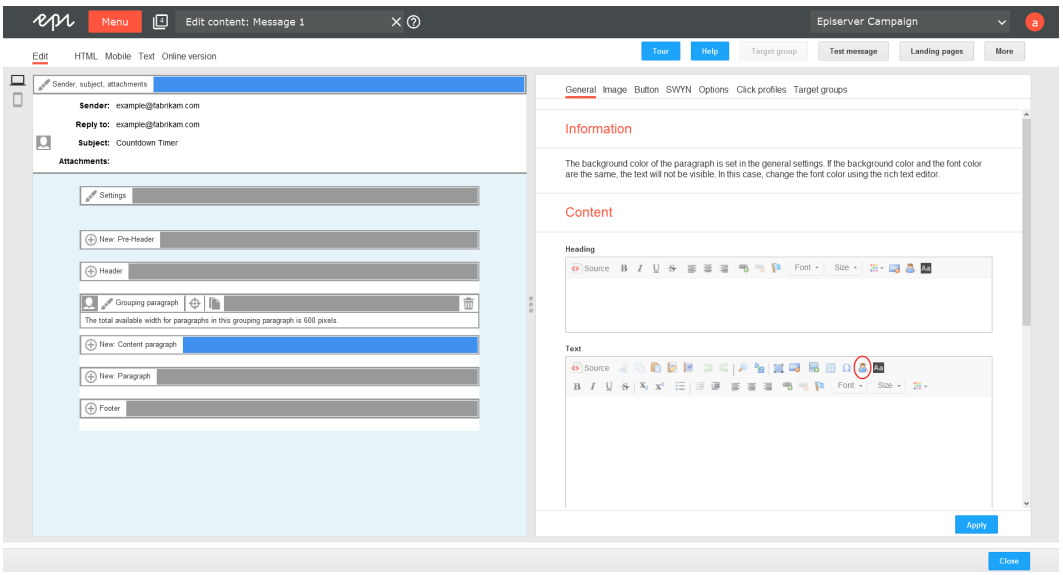
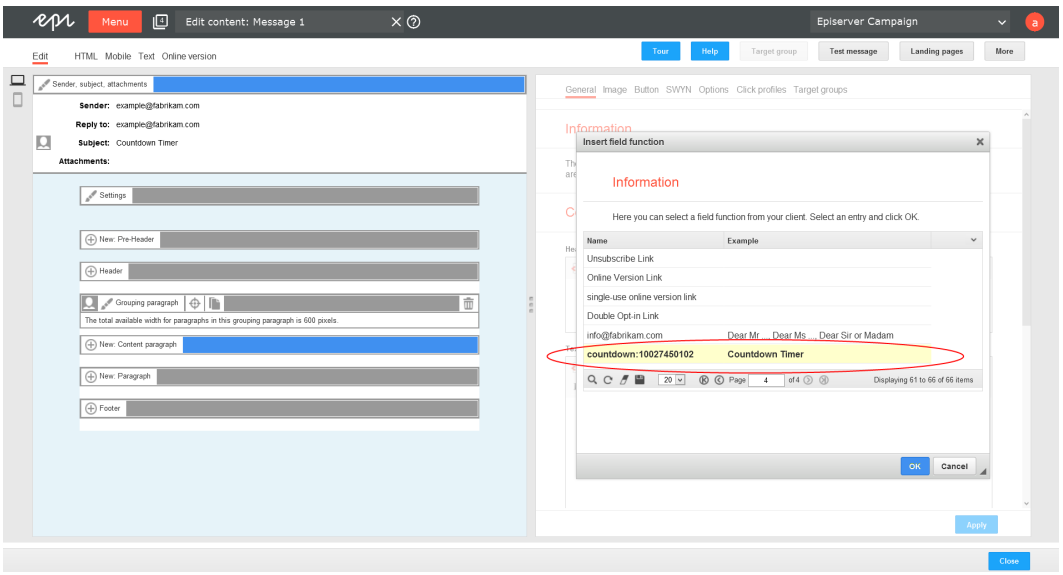
4. In the **Text** area, click **Insert field function** .



A window with a list opens. The list contains all field functions that were saved in your client.

5. In the list, select the field function of the countdown timer that you would like to insert into your message. Confirm your selection by clicking OK .



6. Click Apply .

You have successfully incorporated the countdown timer into your message.

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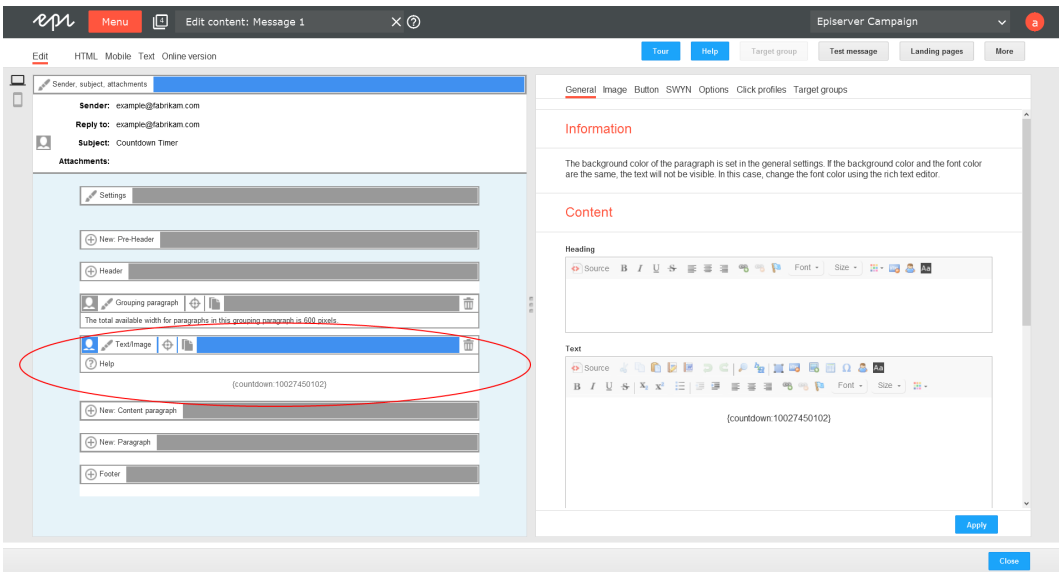
The countdown timer will not be shown in real time in the preview. Send a test message to yourself to test how the countdown timer is displayed before you send the newsletter to your recipients. To send a test message to yourself, click Test message in the upper right of the Template Kit.



Combine countdown timer with a product image/key visual

If you have prepared graphics for the countdown timer (see Prepare graphics) and have created the counter for the countdown timer (see Create a countdown timer) you can combine your product image/key visual and the countdown timer into a single graphic.

The basic procedure: You place the product image/key visual and the timer separately into two paragraphs that lie one above the other and that do not have any spacing between each other.

Perform the following steps:

In the following step-by-step instructions, we will show you the procedure using the Template Kit. If you use a custom template, the specific steps may differ in their details. We also recommend creating a new grouping paragraph for the combining process.

→ 1. In Episerver Campaign, switch to the **Edit content** window for your message.

→ 2. Create a new grouping paragraph in your message by clicking New: Paragraph .

✔ On the right-hand side, a window for selecting the paragraph type opens.

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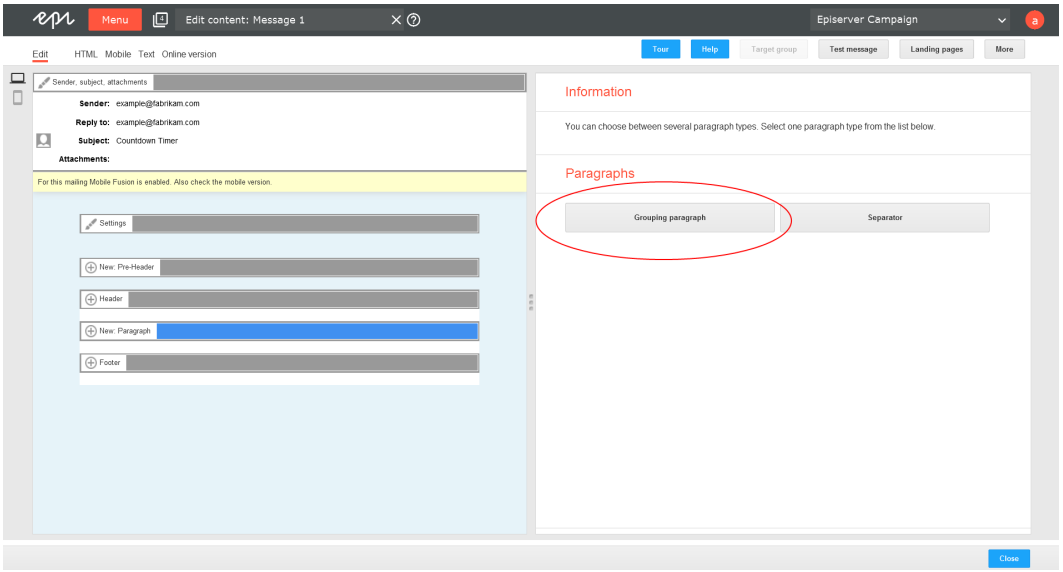
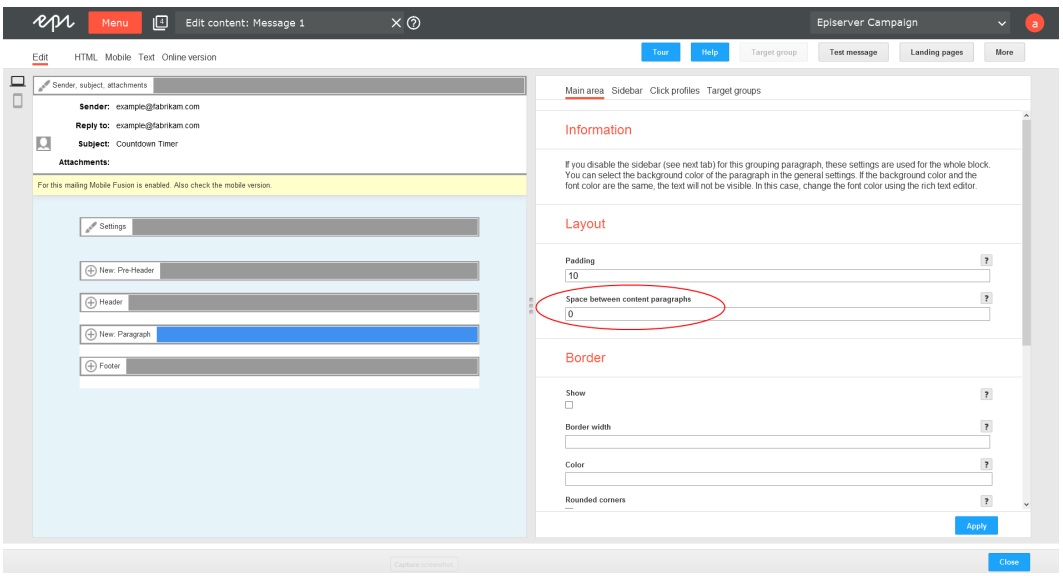
3. Click Grouping paragraph.



✔ The configuration window for the selected paragraph type opens.

4. Under **Layout**, in the **Space between content paragraphs**box, enter 0.



If you forget to enter 0 here, in some cases your product image/key visual and the countdown timer will not be seamlessly combined.

5. Confirm your changes by clicking Apply.

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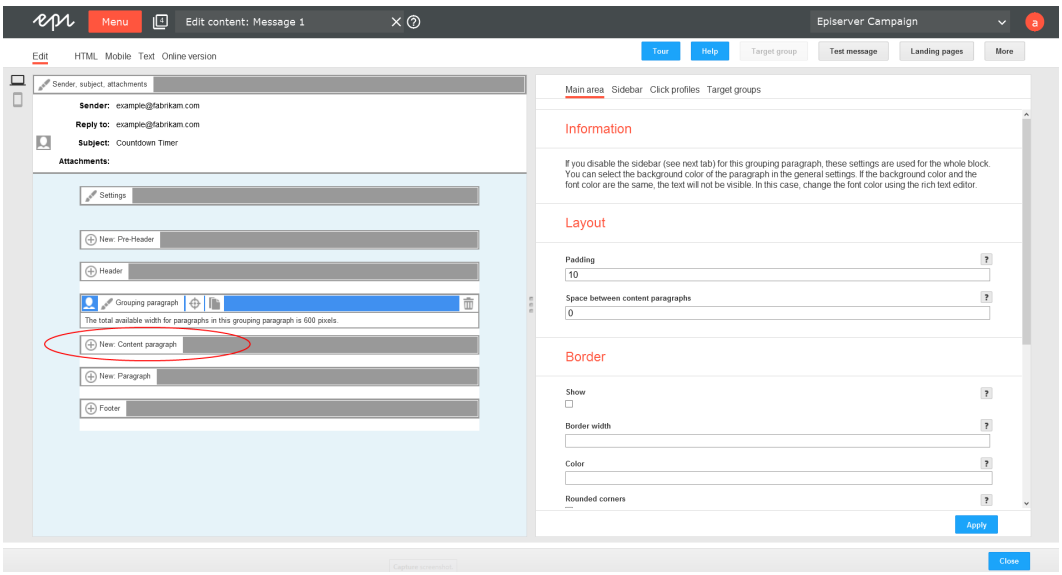
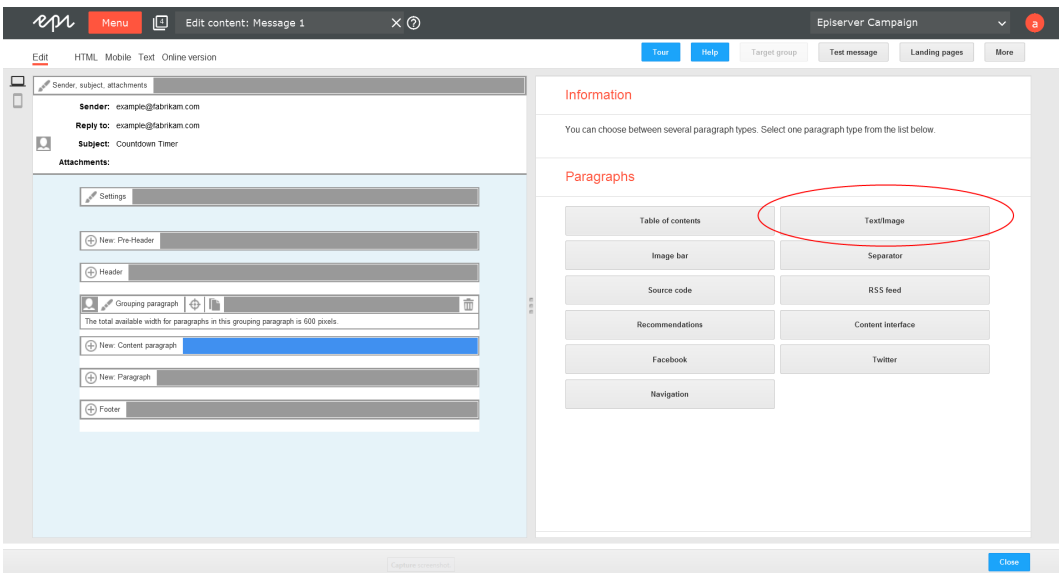
6. Insert a new content paragraph for your product image/key visual into the grouping paragraph by clicking `New: Content paragraph` on the left side of the preview under your new grouping paragraph.



On the right-hand side, a window for selecting the paragraph type opens.

7. Click `Text/Image`.



The configuration window for the selected paragraph type opens.

8. Switch to the **Image** tab and upload your product image/key visual by clicking `Browse...` and select an image in the file browser. If your product image/key visual is saved externally, enter the

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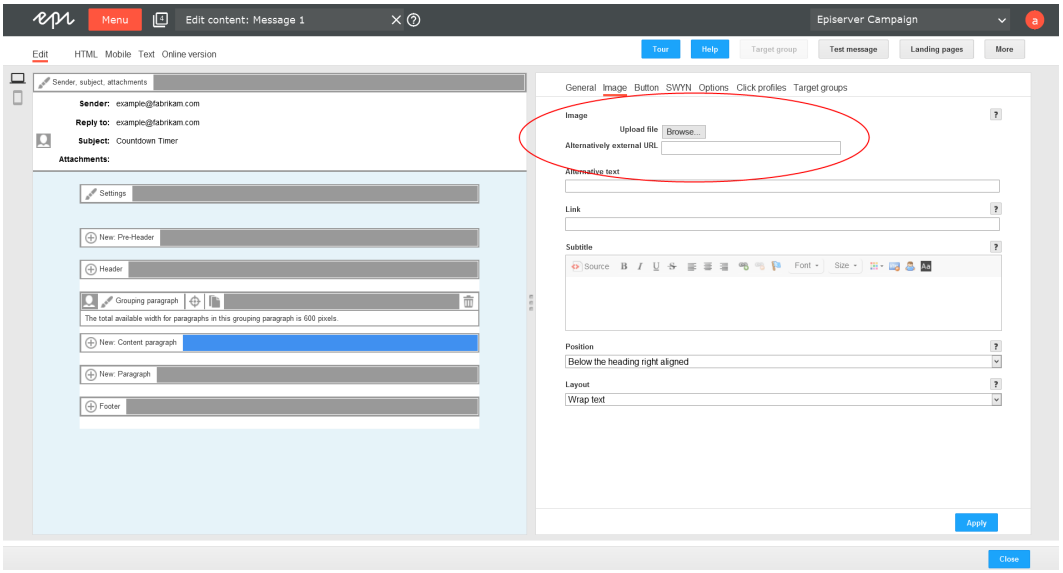
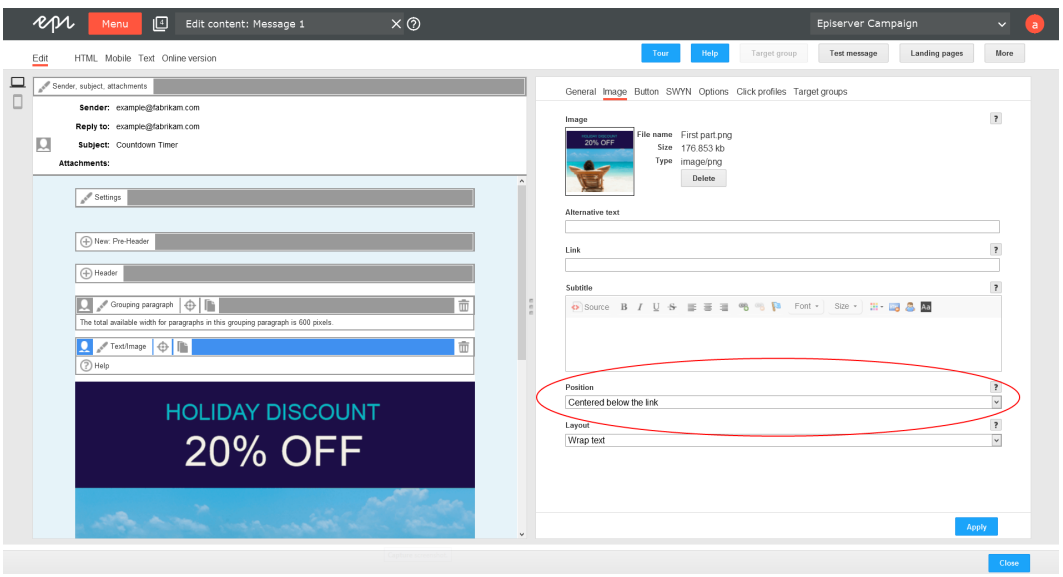
URL.



9. Center the product image/key visual by selecting one of the centering options from the list found under **Position**, for example **Centered below the link**. Confirm your changes by clicking Apply.



10. Insert another new content paragraph for the countdown timer into your grouping paragraph by clicking New: Content paragraph on the left side of the preview.

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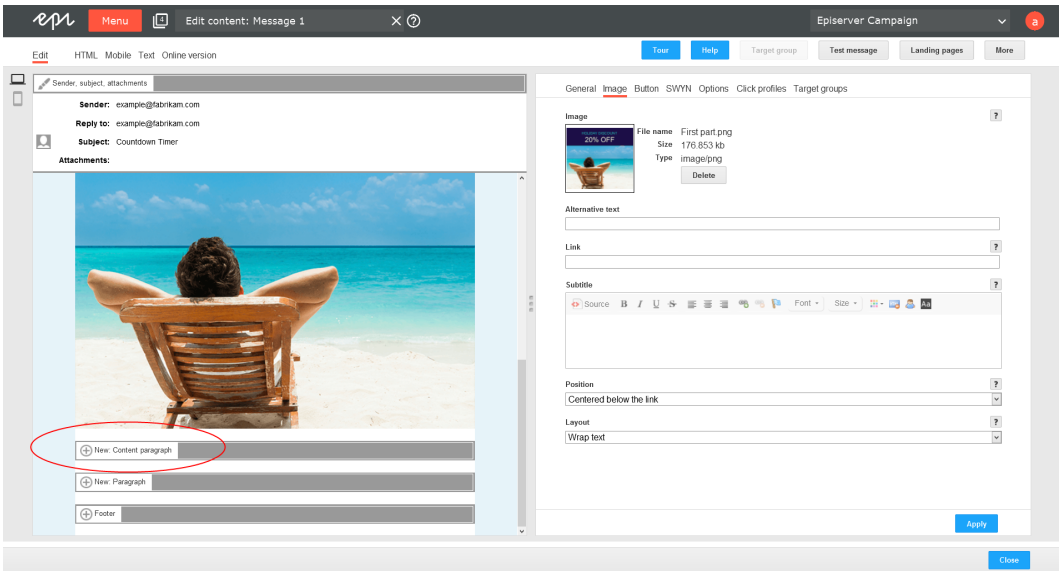
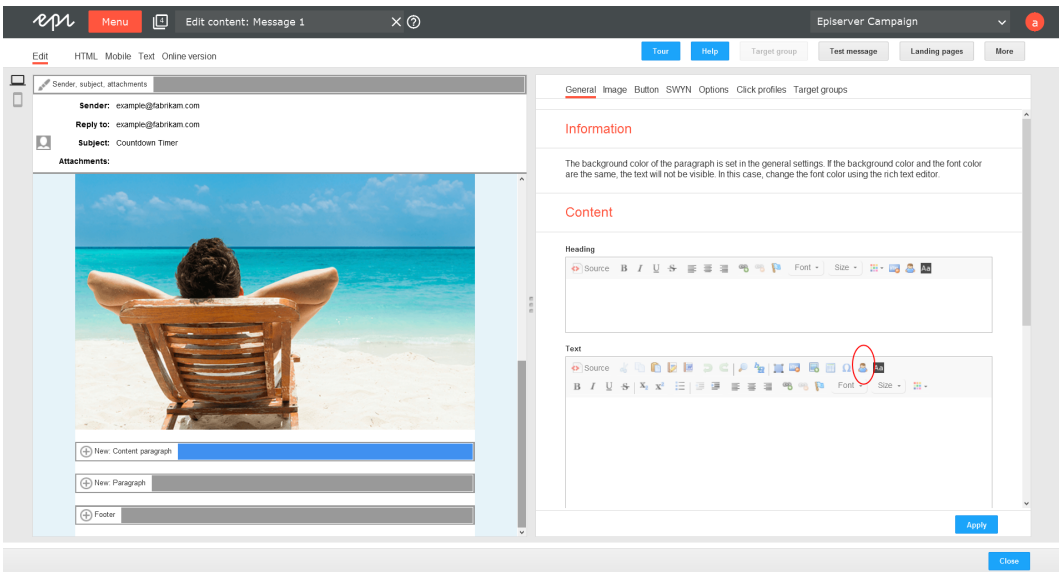


✔ On the right-hand side, a window for selecting the paragraph type opens.

➔ 11. Click Text/Image .

✔ The configuration window for the selected paragraph type opens.

➔ 12. In the **Text** area, click **Insert field function** .



✔ A window with a list opens. The list contains all field functions that were saved in your client.

➔ 13. In the list, select the field function for the countdown timer that you would like to insert into the content paragraphs. Confirm your selection by clicking OK .

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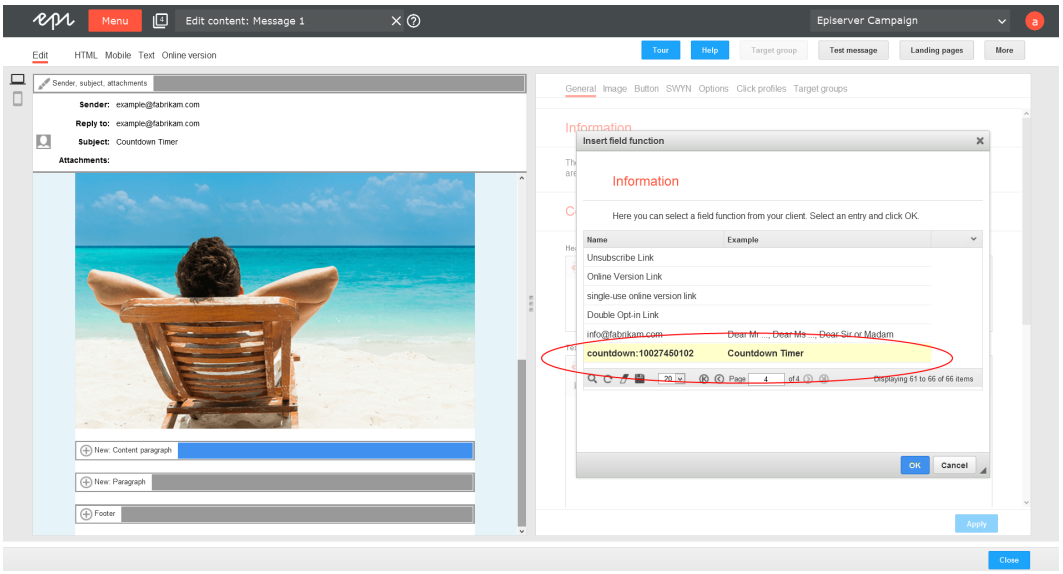
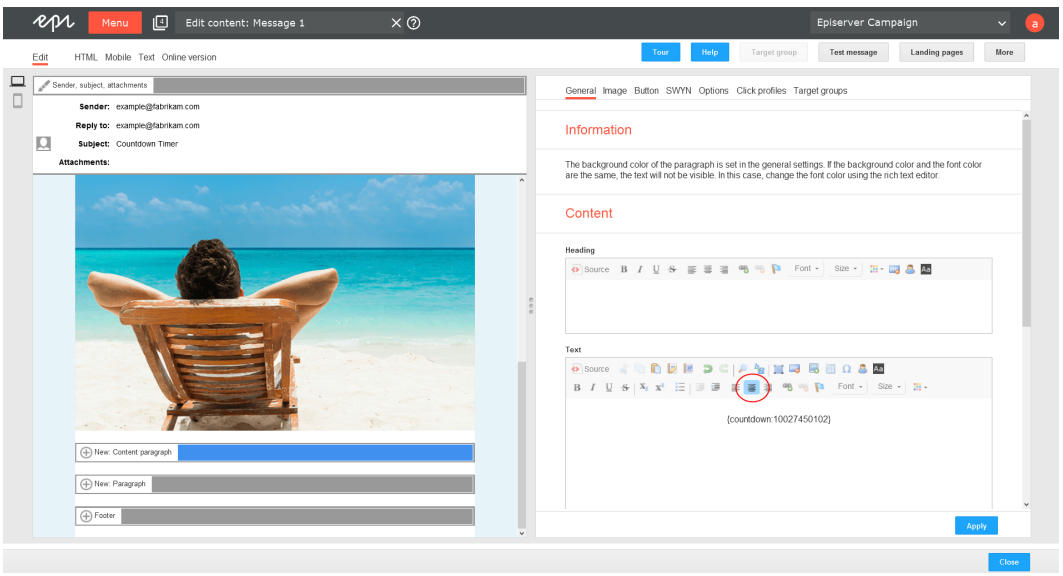


14. Center the inserted field function by clicking the **Center** button.



15. Save your changes by clicking Apply.

✔ You have successfully combined your product image/key visual and the countdown timer into a single graphic. The countdown timer will not be shown in real time in the preview.

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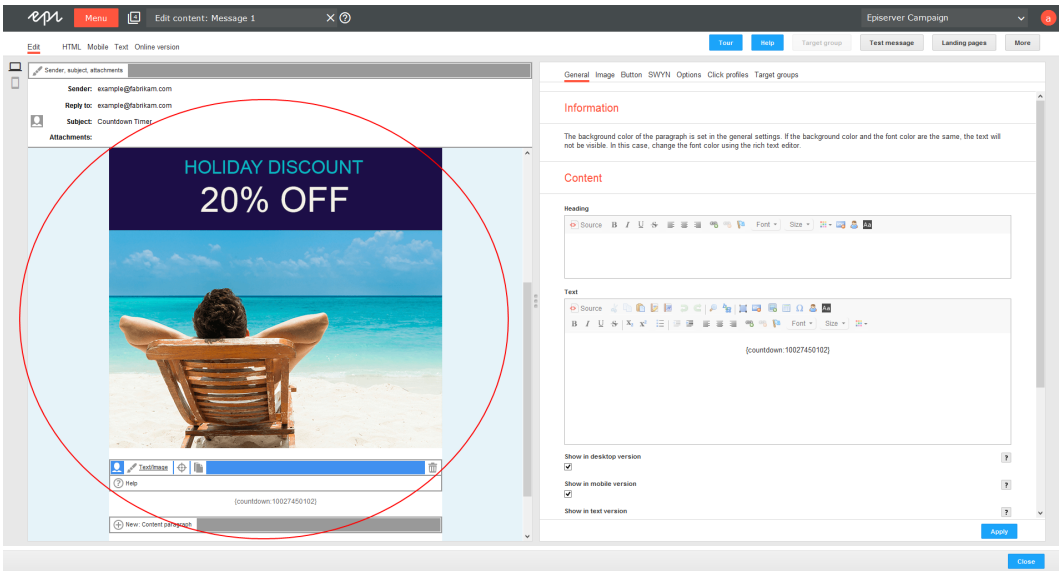
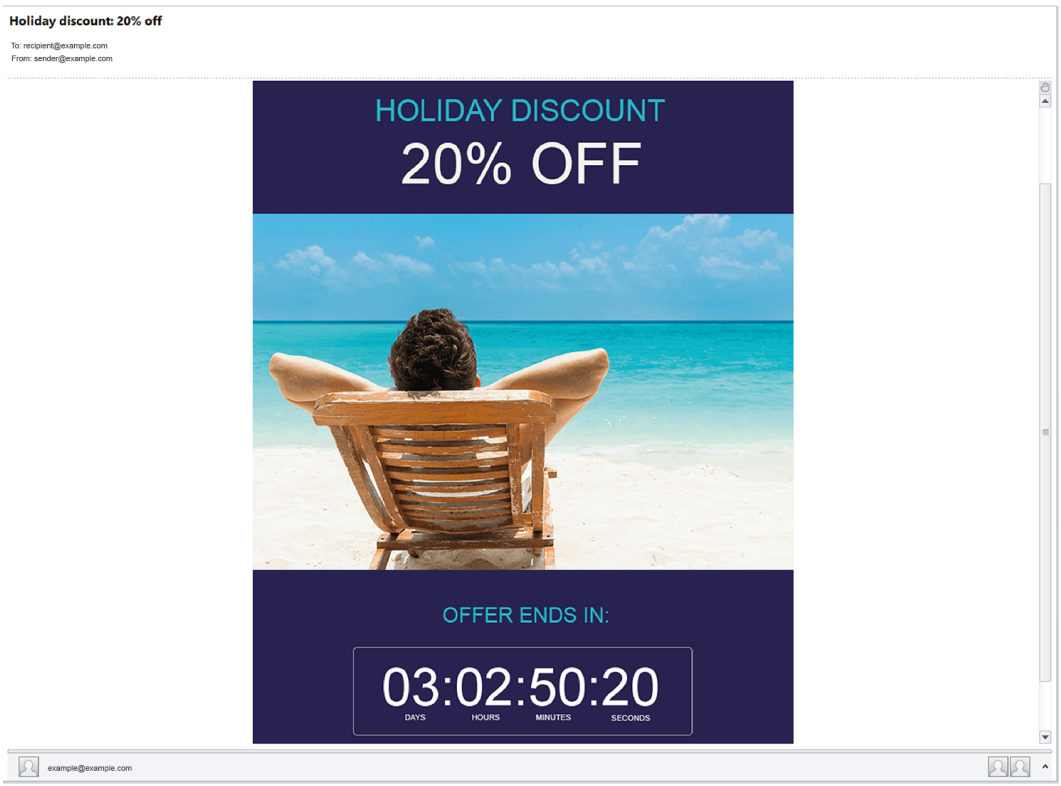


16. Check that the image merge has been successful by sending a test message to yourself before you send your message to recipients.



Edit, copy and delete a countdown timer

You can later edit, copy or delete the countdown timer you have created.

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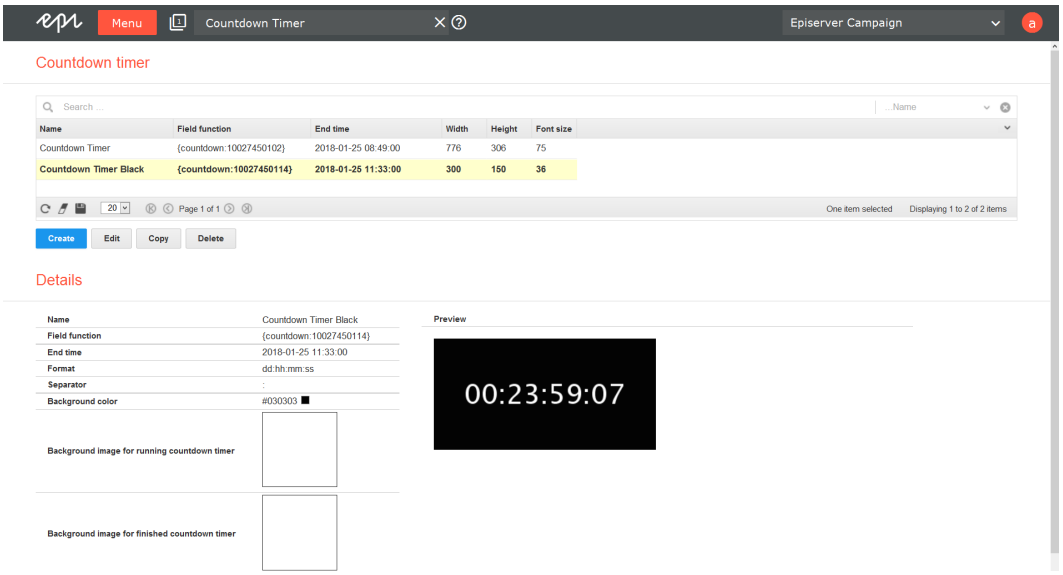
Editing the countdown timer

To edit a countdown timer, perform the following steps:

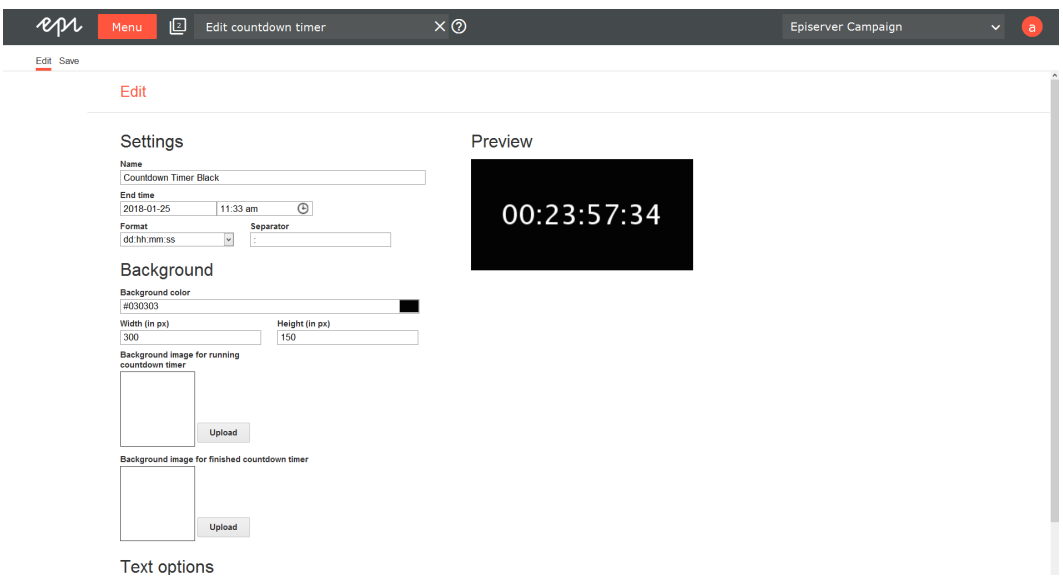
1. Open the start menu and, under **Special**, click **Countdown timer**.



✔ The **Countdown timer** window opens.

2. In the overview, select the countdown timer that you would like to edit.

3. Click Edit .



✔ The **Edit countdown timer** window opens.

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→ 4. Make your changes (see Create a countdown timer).

→ 5. Click Save.

✔ You have successfully edited your countdown timer.

Copy countdown timer

To copy a countdown timer, perform the following steps:

→ 1. Open the start menu and, under **Special**, click **Countdown timer**.

✔ The **Countdown timer** window opens.

→ 2. In the overview, select the countdown timer that you would like to copy.

→ 3. Click Copy.

✔ A copy of the selected countdown timer is saved. The **Edit countdown timer** window opens.

→ 4. Optional: Edit the copy of the countdown timer and give it a new name.

→ 5. Click Save.

✔ You have successfully copied the countdown timer.

Delete countdown timer

Do not delete any countdown timers that are still in use in ongoing mailings.

To delete a countdown timer, perform the following steps:

→ 1. Open the start menu and, under **Special**, click on **Countdown timer**.

✔ The **Countdown timer** window opens.

→ 2. In the overview, select the countdown timer that you would like to delete.

→ 3. Click Delete.

→ 4. Confirm the deletion by clicking Delete countdown timer.

✔ You have successfully deleted your countdown timer.

Troubleshooting countdown timers

The following table lists the most common sources of errors that can arise while working with the countdown timers.

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

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If the problem continues after you have attempted the suggested solution, contact customer support.

Problem	Possible cause	Solution
In the message, the countdown timer is displayed wider than the product image, even though the original file for the countdown timer has the same width.	The global message width for your Episerver Campaign template or your paragraph is smaller than the width of the countdown timer.	Make the global width of the message or the width of the paragraph the same as the width of the countdown timer, or reduce the width of the countdown timer.
There is a gap between the product image and the countdown timer.	A margin was defined for your content paragraphs.	Set the margin for your content paragraphs to 0.
Animated countdown timers do not appear animated in Microsoft Outlook	Microsoft Outlook (version 2007 and above) does not support animated GIFs.	Open the mailing in Microsoft Outlook using the **View in browser** view.
The generated animated countdown timer exceeds the maximum permitted file size of 1.5 MB even though the uploaded background image is significantly smaller.	Episerver Campaign generates an animated GIF with a total of 60 images from the single background image. The file size increases exponentially and exceeds the factor 60 since Episerver Campaign adds the timer for the countdown timer to your background image.	Reduce the file size of your background image. The recommended maximum size is 20 KB. Also, avoid using complex graphic designs such as patterns, photo scenes, many colors, color gradients, and so on. Even if you use a highly compressed JPEG with a file size of only a few KB and thus well-below the recommended maximum size, but it contains a large number of colors, the subsequently generated GIF animation may exceed the maximum size of 1.5 MB.

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Click2Go

With Click2Go you can create buttons for your mailings, without any HTML expertise, directly in the content management system of Episerver Campaign. Click2Go is integrated directly into the Episerver Template Kit and can be used in any paragraph type. Buttons are call-to-action elements that have a high potential for capturing attention. Use them to link to landing pages for products, campaigns, profile pages and much more.

Test the potential of your buttons

Test how much attention a button captures in the context of a mailing using the automated attention analyses from Episerver Campaign. The attention analysis shows you whether the button is placed in a location that captures a high level of attention and is associated with the desired content by the observer.

Activate Click2Go

→ To use Click2Go, contact our customer support which will advise you on this paid additional function and set it up for you upon request.

✔ Once Click2Go is activated, you will see the new **Button** tab in your content paragraphs. Design the buttons as described in the following section and test your design as usual using a test email.

Insert and design buttons

To insert a button into a paragraph and edit it, perform the following steps:

→ 1. Edit the paragraph in which you would like to add a button

→ 2. Select the **Button** tab in the top tab bar. The following areas are displayed:

- **Template**: In this area you can insert two different button templates into your mailing. The templates are provided along with the Click2Go function.
- **Options**: In the tabs (described below), you can create a new button or edit one of the available templates.
- **Preview**: The preview shows you the current design of your button in real time. When you are finished, always test your buttons in a test email.

When you are finished, always test your buttons in a test email.

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General tab

Parameter	Description
Text	Enter the text for your buttons.
URL	Here you can save a destination URL to which your button should link to. Do not forget to fill in a destination URL. If you do not name a destination URL, the button will not be displayed in your messages.
Alignment	Set the position of your button in relation to the other content elements of your mailing.

Text tab

Parameter	Description
Font type	Here you can select the font of your text.
Color	To define the color of your button border, click the displayed value and then set the desired color in the selection window.
Size	To set the size of your text, adjust the value manually or using the slider.
Bold	To make your text bold, select the check box.
Italic	To make your text italic, select the check box.
Underline	To make your text underlined, select the check box.

Background tab

Parameter	Description
Color	To select the background color of your button, click the displayed value and then set the desired color in the selection window.
Image	To select a background image for your button, click Browse... and select the image from your local hard disk. Alternatively, in the Alternatively external URL box, enter a URL that points to the image file. Note that background images may not be displayed depending on the email software being used and the security settings of the recipient.

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Parameter	Description
	If you select a background image, always specify an additional background color as a fallback, in case the background image is not displayed in the recipient's email program.
Alignment	Here you can set the position of your background in relation to the other content elements of your mailing.
Repeat	Here you can set your uploaded image to be repeated in various arrangements.

Symbol tab

Parameter	Description
Image	To select a symbol for your button, click Browse... and select the image from your local hard disk. Alternatively, in the Alternatively external URL box, enter a URL that points to the image file. Note that background images may not be displayed depending on the email software being used and the security settings of the recipient.
Position	Here you can specify the position of the symbol in the foreground of your button.
Margin left	Here you can set the spacing for the left side of your border by adjusting the value manually or using the slider.
Margin right	Here you can set the spacing for the right side of your border by adjusting the value manually or using the slider.

Padding tab

Parameter	Description
Top	The internal spacing indicates how much spacing is between the text and the outer edge of the button. Change this value to change the size and visual appearance of the button. You can individually define the internal spacing for each side.
Bottom	
Left	
Right	

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Border tab

Parameter	Description
Width	To set the width of your border, adjust the value manually or use the slider.
Color	To select the color of the button border, click the displayed value and then set the desired color in the selection window.
Radius	Here you can define the shape of your button. The higher this value is, the rounder the corners will be.

Picture Perfect

Would you like to directly edit your images as part of your template or using the Episerver Template Kit without having to resort to an external graphics software?

You can also perfect your images with the new feature Episerver Campaign: Picture Perfect not only allows you to optimally resize your images, but also makes it possible to adapt its properties to your individual needs.

In the standard configuration, by uploading images into your template or the Template Kit, these are automatically scaled to the proper size as part of this process so that these can be used to create your mailings without problems. The paid Picture Perfect extension additionally offers a multitude of possibilities for direct editing of images in Episerver Campaign.

What features does Picture Perfect offer?

	Enhance: This function is used to optimize the resolution, brightness or the colors of your image. **Effects**: This function is used to select an effect from a selection of various color

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	contrasts to change the image to your liking. **Frames**: This function is used to select between different frames and thus improve the overall expression of your image. **Orientation**: This function is used to rotate the image in 90-degree increments or create a mirrored version of it. **Focus**: This function is used to focus on a specific section of an image, which will then appear noticeably sharper than its surroundings. **Resize**: This function is used to change the pixel values for the width or height of your image. Changes made to one value automatically apply to all values. **Crop**: This function offers multiple predefined selection options for cutting your image to a specific size ratio. **Warmth**: This function uses a slider to control cold or warm colors. **Brightness**: This function allows you to lighten up or darken your image in a more significant manner as compared to the Improve tool. **Contrast**: This function allows you to adjust the contrast of your image. **Saturation**: This function allows you to change the quality of the colors. **Sharpness**: This function allows you to change the sharpness of your image. **Splash**: This function allows you to change the coloring of your image. **Draw**: This function allows you to select a color and brush size. You can then draw inside the image and express your own creativity! Changes you don't like can just be erased again. **Text**: This function allows you to add text to the image. You can also select the color and font for the screen text. **Redeye**: This function is used to remove the unwanted “red eye” effect. **Whiten**: This function is ideal if you would like to merely brighten a certain section of the image and not the whole image itself. **Blemish**: This function is ideal if you would like to merely dim/darken a certain section of the image and not the whole image itself.

How do you activate and use Picture Perfect?

If you would like to use Picture Perfect as part of your template or the Episerver Template Kit, consult our customer support, which will explain the fee-based add-on and will take all the steps necessary to implement the functions, if desired. As soon as Picture Perfect has been activated, the world of professional image processing in Episerver Campaign is at your finger tips.

To use Picture Perfect you just have do the following:

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1. Select the appropriate paragraph (text/image, product paragraph or image bar) for your image.
2. Upload your image.

✔ The image will automatically be scaled to fit your template during this process (standard setting for individual templates and in the Episerver Template Kit).

3. In the **Image** tab, click Edit.
4. Select the appropriate tool from the functions described above and change/edit the image to your liking.

Image personalization

Personalized images can boost response rates significantly in comparison to merely personalizing the email text. This is because images convey more inherent emotion than text alone and have an effect even before the recipient commences reading. Personalized images are especially eye-catching when they contain the name of the recipient: One's own name is a unique prompt and entices to continue reading. Instead of using general images, mailing recipients are sent personalized pictures to suit the occasion, for example, their name written on a cake for their birthday or the name of the travel destination they have just booked on an airport display board.

How does image personalization work?

Episerver worked with leading image personalization company DirectSmile for years. Integration of their innovative solution with Episerver Campaign is seamless. Mailings containing personalized images are edited using the same method as regular types. The actual personalization occurs automatically during dispatch – no further action is necessary on your part. The data required for personalization (e.g. the recipient name) is transferred together with the image URL by Episerver Campaign at the point when the emailing actually occurs. The personalized image is available in real time and is found on the

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DirectSmile server with an unique URL. As soon as the recipient opens the email containing the personalized image, the URL is invoked and its content is displayed directly in the email.

Setting up a mailing project with personalized images

Personalized images are inserted into mailings the same way as normal images. The image URL contains the text to be inserted in the form of a placeholder (in the example below: {name}). When the URL is invoked, the corresponding name is automatically inserted from the Episerver Campaign database.

Example URL

```
http://xyz.example.com/.../streamimage.aspx?set=motifname&t={name}...
```

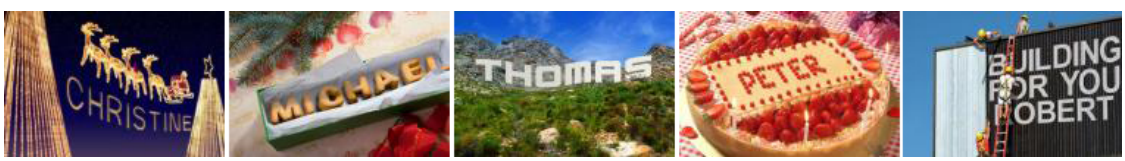
The placeholder is generally configured with a so-called fallback. In instances where personalization data is missing, a standard fallback text is thereby provided that is then inserted in the image in place of the name. In the case of a birthday mailing this might, for example, be "Happy birthday!".

Uniting image personalization and target groups

Various themes can be used for personalization in a single mailing. In this case, a motif is inserted for every theme, which is then allocated to one target group. We recommend employing different motifs for men and women. Other obvious target group segmentation possibilities include age or location (on the basis of postal codes). Should you also have information on the recipients' interests (e.g. sport, travel, technology etc.), these are also ideal to use for targeted personalized images.

Motif selection

Our partner DirectSmile has a wide range of pre-configured motifs for all types of themes for personalization. You can view these in the online catalog. Should you wish to use one of the motifs for your image personalization efforts, our support team will send you a new mailing template that incorporates the formatting adjustments. This lets you to best assess the impact of the image.



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Alternatively, we can produce an image according to your specific request. We require a background (such as a clear sky or a meadow) along with details on how you would like the text to be inserted (e.g. as skywriting or foliage on the meadow). Such individually created personalized images can therefore take your corporate design completely into account. The image format (e.g. a header spanning the entire width) is also taken into account during the production of the template. The technical possibilities for personalizing images are virtually limitless. 3D scripts, distorted perspectives, textures and shadows can all be depicted without a problem.

If you have questions regarding the selection of a motif or are unsure if your ideas are feasible, our support team will be glad to assist.

Examples of use

Especially beneficial is working with personalized images as part of a lifecycle marketing campaign: To turn prospective customers into regular customer, to provide existing customers with incentives or trigger mailings, or to reactivate dormant customers. Our examples of regular and special mailings, below, provide an idea of typical instances for effective image personalization in email marketing.

Regular mailings

Regular mailings with personalized images can be used to address your customers personally on special occasions such as Christmas or New Year. If you send such types of emails regularly, let us prepare a mailing template for the corresponding occasions for you.

Special mailings

Mailing that are triggered by specific events are especially suited for incorporating personalized images:

- Birthday mailings
- Voucher or bonus mailings ("Thank you for your loyalty, Ms Citizen!")
- Competition news mailings ("Dear Mr Citizen, you have won!")
- Mailings triggered by profile changes ("Welcome to Berlin, Ms Citizen!")

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We would be pleased to provide you with more information regarding the personalization of images and their incorporation in your campaign emails.

Costs

A one-off fee is charged to prepare the motif, based on expended effort. Besides normal dispatch costs, an additional change is levied per image opened by the recipient. These costs are invoiced separately. We are happy to provide you with a quote for image personalization in your mailings.

Easy Copy

Save time by using the intelligent Easy Copy feature. Make your daily work with Episerver Campaign even easier with this extension for Episerver Campaign. When creating messages, conveniently apply individual paragraphs including text and images from other messages – from any client, quickly and intuitively. The imported contents can be edited and adapted as needed for your new message.

Optimize your campaign creation workflow using Easy Copy and save valuable time and resources.

Setup

➜ To set up Easy Copy get in touch with the Episerver customer support which will be happy to enable this feature for you.

Copy content

To copy content from other messages into your new message, perform the following steps while in the edit mode of the Template Kit:

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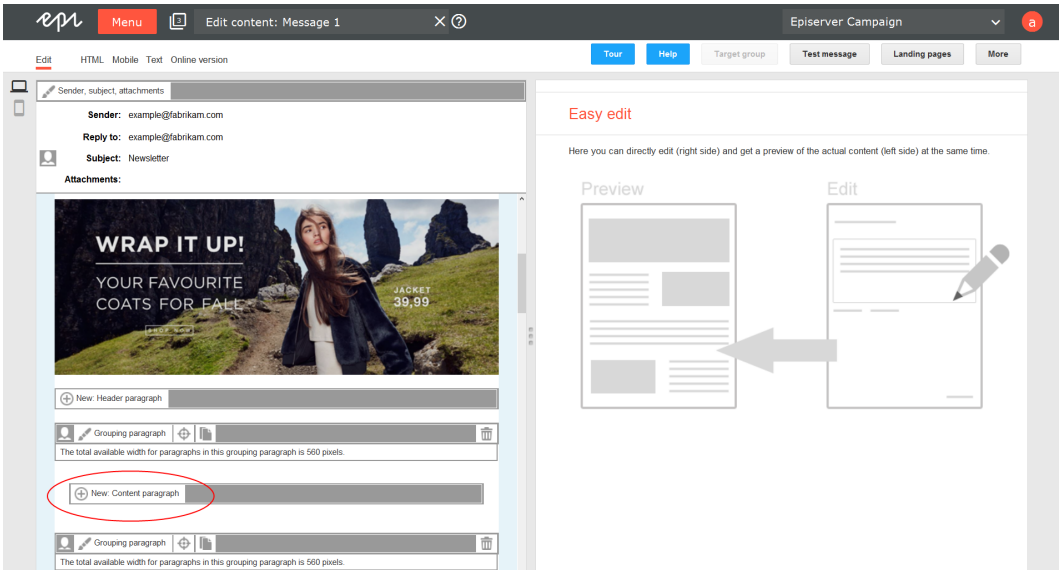
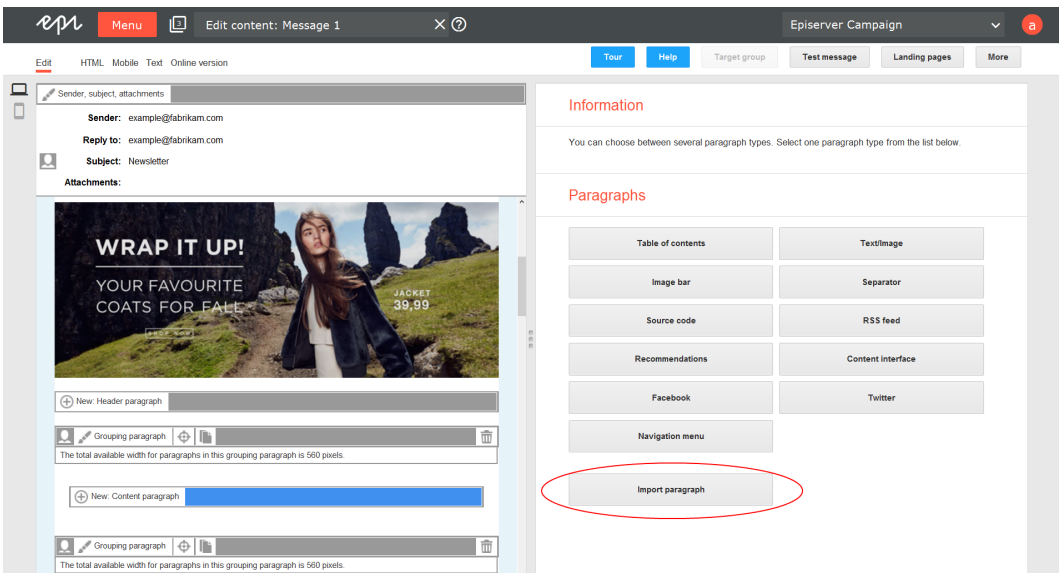
1. To the left of the message preview area, click on New: Content paragraph .



✔ The right edit window shows a selection of paragraph types

2. Click Import paragraph .



✔ A new window opens. You are asked to select the source content.

3. In the **Source client** drop-down list, select the client where the message or message template containing the content that you wish to import can be found.

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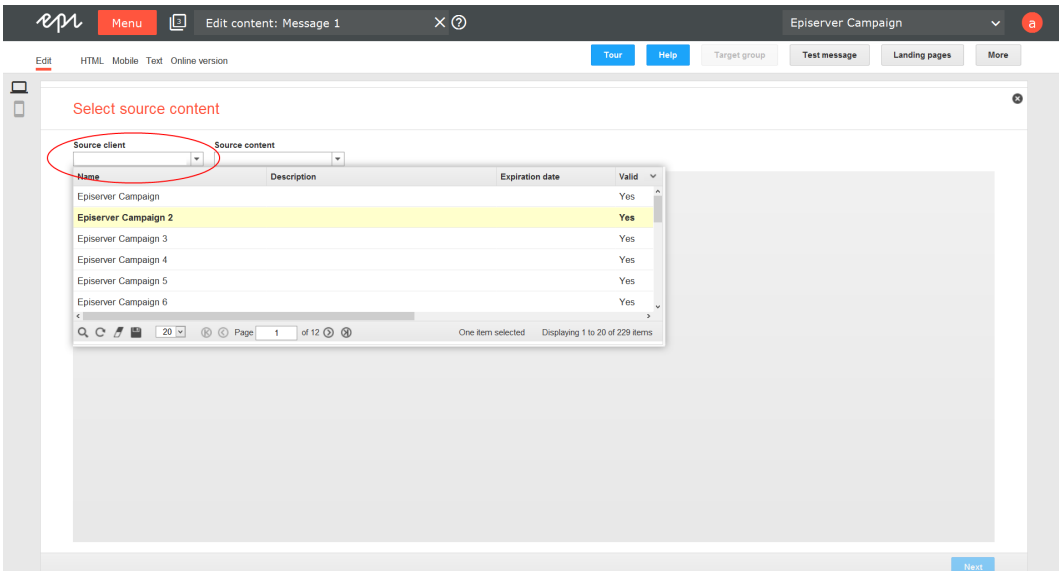
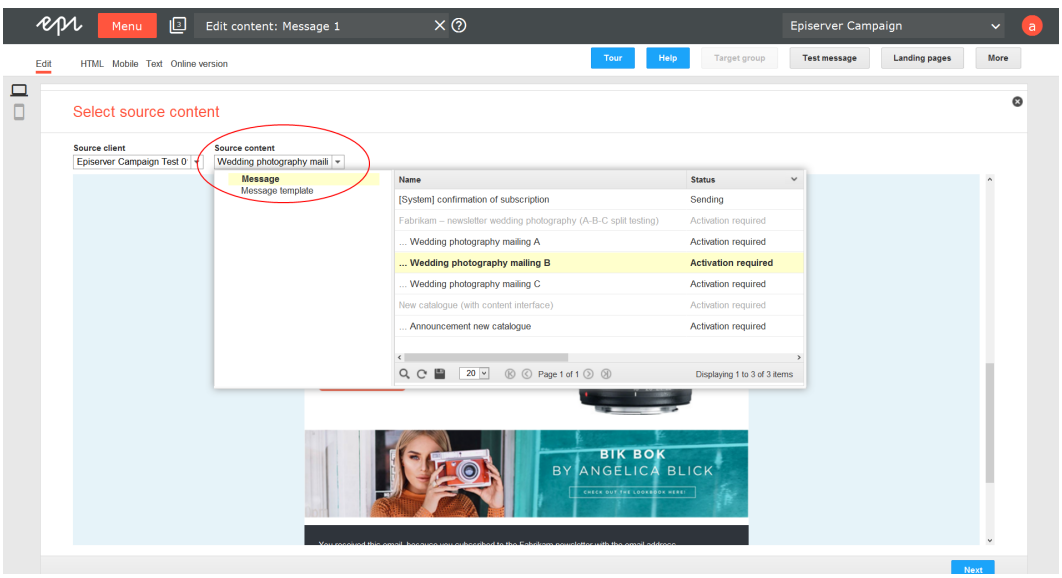


4. In the **Source content** drop-down list, select the message or message template which contains the content you wish to import.

Click on a message or message template in the overview list to see its content. This will allow you to quickly find the text and images you wish to import if you are unsure in which message or message template the content is located.



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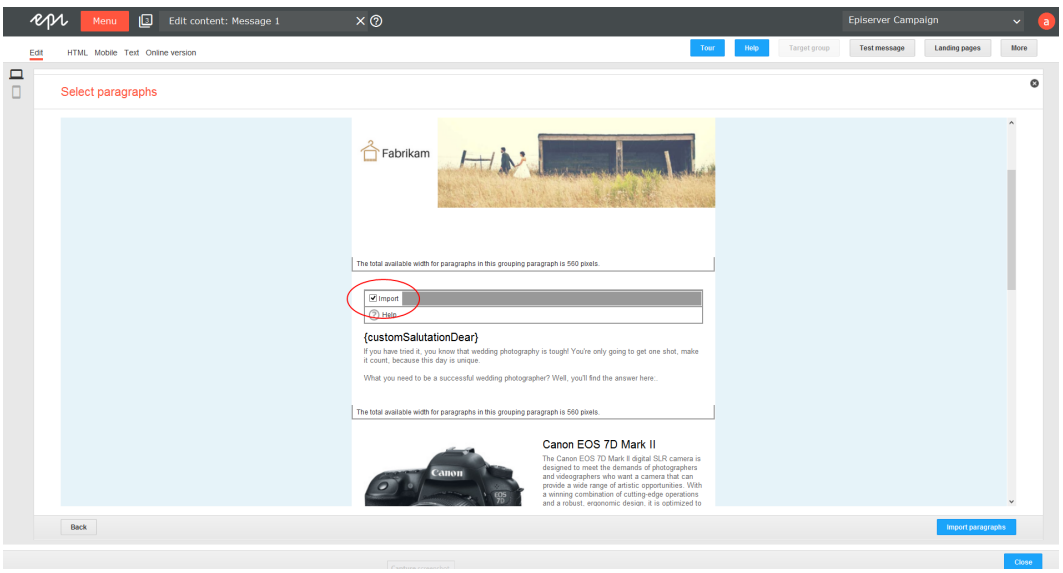
5. Select the message or message template containing the content you wish to import.

If you wish to import content from several different messages or message templates, repeat steps 1 to 8 after you have completed an import from a message.

6. Click Next.

✔ The **Select paragraphs** window opens.

7. Select the content you wish to import by checking the relevant check box.



8. Click Import paragraphs.

✔ You have successfully imported the selected content into your message. This content can now be edited if required.

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Mobile Fusion

With Mobile Fusion we make your templates fit for mobile devices. Up to **50 percent** of internet users receive their emails on a mobile device regularly. Display size and usability of these devices (using a touch screen instead of a mouse or track pad) lead to new paradigms in newsletter design. With Mobile Fusion we have created the possibility, to add a mobile version to your existing template and make it fit for smartphones & co.

Why a mobile version?

Smartphones and tablet PCs are quite different in their usability from a traditional computer. Their display sizes are significantly smaller, depending on the type of device. The available space should thus be used optimally. Scrolling should be limited to vertical, not horizontal. To increase the usability, images should be displayed as large as possible, i.e. "fit-to-screen", a floating layout or columns should be avoided. Finally, the optional changing from portrait mode to landscape mode by simply rotating the device should be supported by the newsletter.

Checklist for a mobile version of your newsletter:

- Layout with a minimum width of 320 pixels
- Additional layout for a maximum width of 480 pixels recommended
- Adaption of the layout to full-screen mode
- Images are displayed at optimal size
- Single-column layout preferred
- Automatic detection of display width and adaption of the newsletter layout accordingly

Adaption of your template

Any newsletter template can be adapted to mobile layout. We offer a full-service adaptation, where you get everything from the first scratch. Alternatively, you may send us your own mobile layout and we implement it into your template. Compare the two options and find out which one suites you best:

- Full service adaptation
- Implementing your own layout

Full service adaptation

1. You indicate the template you wish to adapt for a mobile version.
2. We create a layout with flexible widths (two different widths, flexible display according to display size) **or** another layout using fixed width.
3. You choose a layout, we implement it into the template.

Your benefits:

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- You get everything from one source and benefit from our experience in template design.
- We look at practicability from the very beginning, you can be sure that our layouts work in your template.

Implementing your own layout

1. You indicate the template, for which you wish to implement a mobile version.
2. We check, if the indicated template is suitable for flexible width or fixed width mobile layout.
3. Accordingly, you provide a layout with flexible **or** a fixed width.
4. We implement the provided layout into the template.

The mobile layout must not be totally different from the regular HTML layout, elements must follow the same order and structure. For example, you must not change the position of an image above the text to a position within the text.

Flexible vs. fixed width

Ideally, mobile layouts are implemented with a flexible width. The layout adapts automatically to the size of the display ("fit-to-screen"). Our experience has shown, that the best way to achieve this, is a flexible layout using two widths. Any width in between these two is scaled to fit automatically. Thus, the available display space is always used optimally. At a defined width between the two defined values, the layout switches from one to the other. Display with a higher resolution, use the regular HTML layout.

Are there cases, where a flexible width layout cannot be implemented?

For complex template layouts, e. g. if text is rendered into an image, a flexible width layout **cannot** be implemented. In this case, we offer a fixed layout width for your mobile version.

Layout	Width
Flexible width	320 / 480 px[1]
Fixed width	320 px[1]

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[1] Default values. If you wish different values, ask customer support.

Optimizing newsletters for mobile devices

The Episerver Template Kit is optionally available with Mobile Fusion. This expansion takes the limitless flexibility provided by the Template Kit and applies it to the mobile version of your newsletters. This guide provides you with information and tips that will help you quickly find your way around the various design possibilities for mobile newsletters and shows you how to integrate them into the mobile version of your mailings in just a few clicks.

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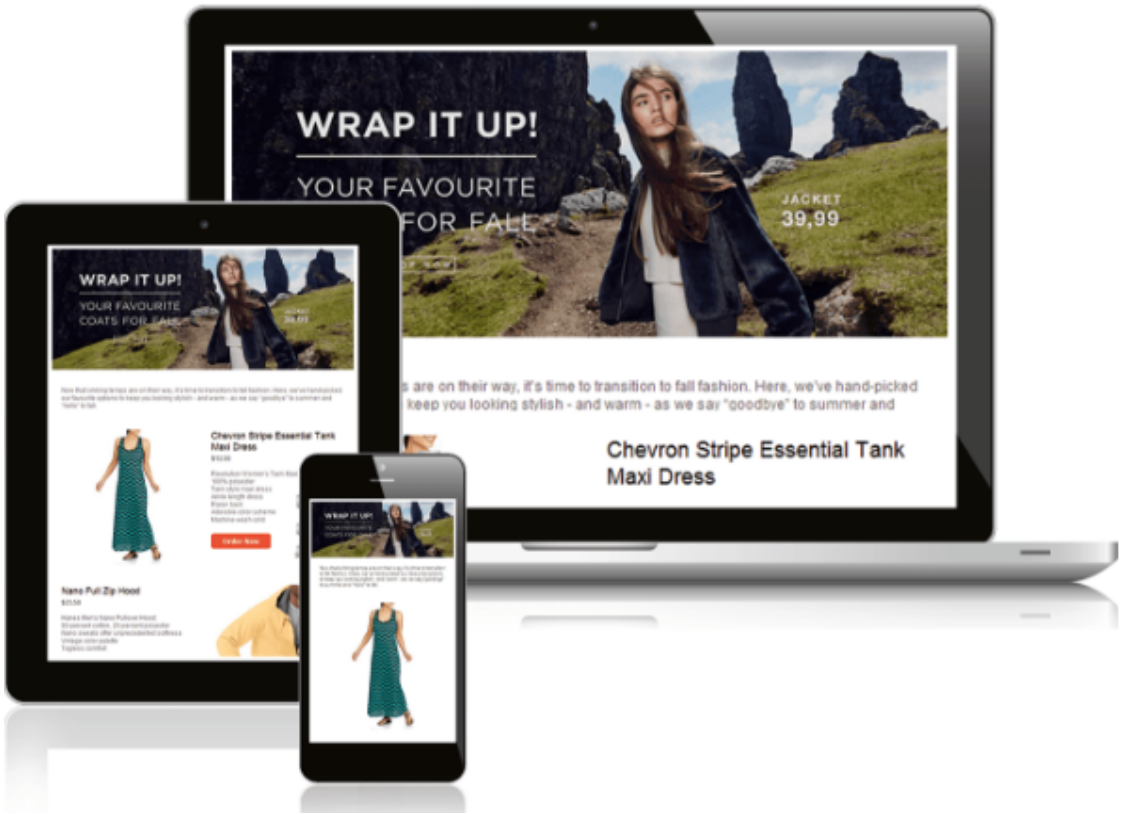

Before you begin setting up your own mobile version:

- You will first need to get the Template Kit with Mobile Fusion. If you have not yet installed Mobile Fusion or are not currently using the Template Kit, contact customer support.
- In the chapter on the Template Kit in the Episerver Campaign user guide you will find full documentation describing paragraphs, setup and configuration of the Template Kit, including mobile options.
- On our Mobile Fusion page you will find information about design options for the mobile layout of newsletters.

What does the Template Kit with Mobile Fusion offer?

Enter the following settings in the Template Kit with Mobile Fusion to optimize the display of your mailings on mobile devices:

- **Enable or disable mobile version**: When you enable the mobile version, Episerver Campaign automatically generates a version of your mailing optimized for mobile devices; doing so will increase the size of each email sent out. Click here to read the chapter in the manual.
- **Place the sidebar above/below the main body**: You can indicate in each paragraph whether the sidebar (if present) should be displayed before or after the main body. Click here to read the chapter in the manual.

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- **Hide/display paragraphs in the mobile version**: You can indicate, by paragraph, whether that paragraph should be integrated into the mobile version. Similarly, you can also indicate whether a paragraph should appear solely in the mobile version and be hidden in the text version. Click here to read the chapter in the manual.
- **Set paragraph width in the mobile version**: You can set the width of each paragraph (in %) for mobile display. Click here to read the chapter in the manual.
- **Set the width of paragraph separation in the mobile version**: You can set the width of the paragraph separators (in %) in the general settings for the template. Click here to read the chapter in the manual.

7 steps to perfect mobile versions

Create a click profile for the mobile version

You can also specify a click profile for the mobile version to later evaluate how many recipients have clicked the mobile version. Create a click profile—for example with the name "mobile user"—and select this profile in the **Click profile** drop-down list located in the **Mobile** tab of the template's general settings.

Landing pages

Mobile Fusion also automatically creates mobile versions of landing pages and SWYN pages. The mobile versions of landing pages can also be adapted using the settings described here.

Create the desktop version first

Before creating a mobile version of a mail, you should first create the desktop version. The default settings for Mobile Fusion were selected for the template kit in such a way that all content paragraphs are automatically copied to the mobile version. The sidebar is displayed beneath the main content area, the table of contents will be hidden. You can change all default settings later.

Hide contents, which are not supposed to appear in the mobile version

All paragraphs can be individually enabled for the mobile version. By default, this option is already active for all paragraphs, except for the table of contents. If you would like to, for example, make your mobile newsletter more compact, you can remove individual paragraphs from the mobile version by removing the **Show in mobile version** check mark.

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Be sure not to hide any main elements such as the header, footer or editorial to ensure that the mobile newsletter remains complete.

Create alternative paragraphs for the mobile version

It may happen that content paragraphs are not displayed correctly or as desired in the mobile version, for example because the used images look awkward in the smaller mobile view or because the paragraph contains too much text. If you would like to add these paragraphs to the mobile version nonetheless, create two variants—one for desktop viewing and one for mobile viewing. Deactivate the other – unused – view in the settings of both paragraphs.

Only use this option if the adjustments made to the mobile layout have not resulted in desired effect. Make sure that only one paragraph version appears in the newsletter. Deactivate the text version of the paragraph that is supposed to be displayed in the mobile version, as otherwise both paragraphs will appear in the text version.

Add paragraphs that should only be displayed in the mobile version

If you would like to send certain information only to recipients with mobile devices, add a content paragraph at the corresponding position and hide this paragraph in the desktop version by clearing the **Show in desktop version** check box.

Be sure not to hide any important content in the desktop version. Deactivate the text version of the paragraph, as this paragraph would otherwise also be displayed to recipients reading the text version.

Position the sidebar

In the mobile version, the sidebar of a structuring paragraph is displayed above or beneath the main content area for display purposes. This will cause the arrangement of elements to shift. If you, for example, insert a table of contents or the newest messages into the sidebar, it is recommended to display the sidebar above the main area or to hide the table of contents in the mobile version. Test to see whether the contents of the mobile version are displayed in the correct order. When using multiple structuring paragraphs in a single mail, you can configure this setting separately for every structuring paragraph.

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Adjust the width of paragraphs for the mobile version

You can specify a percentage width for the mobile version in all content paragraphs to create a multi-column layout. Note that this setting will only take effect if you adjust the width in two consecutive paragraphs so that a total width of 100% is achieved. You can, for example, use this option to enforce that an image is displayed next to a specific text. Use a paragraph with an image and another paragraph with a text for this purpose. Then specify a width of, for example, 30% for the image paragraph. You then need to enter a width of 70% for the text paragraph. Only use this option for short texts and simple images or graphics, as multi-column layouts reduce the visual quality and readability for mobile viewers.

Professional tips for optimizing the mobile version

- **Optimize the general settings of the template**: The template kit offers maximum flexibility for newsletter design. You can select spacings, borders, colors and other configurations yourself. Most of these settings, except for the width and outer edge of the newsletter, will be copied to the mobile version. Should the mobile version not look its best, you can also change the appearance of the mobile version using these settings.
- **Test the newsletter using Outlook**: The HTML and mobile preview offers a simulated view of the mail in email programs and on mobile devices. The actual view may vary depending on the used software and hardware. Our experience has shown that the views pertaining to Microsoft Outlook 2007 or Microsoft Outlook 2010 is a good indicator for the correct displaying of the newsletter. If Outlook displays correctly and without errors, it is very likely that other programs and web mailers will also display the mail as intended.
- **Change to the mobile view in editing mode**: When editing a mail, it is possible to quickly change between the desktop and mobile view by making the editing window in Episerver Campaign smaller and decreasing the width using the mouse pointer. As soon as the window width is less than 600 pixels, the view will change to the mobile view.
- **Note**: The mobile version may not be displayed uniformly in all email applications and can deviate from the preview layout or the testing emails.

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Tips and possible sources of error

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Desktop version

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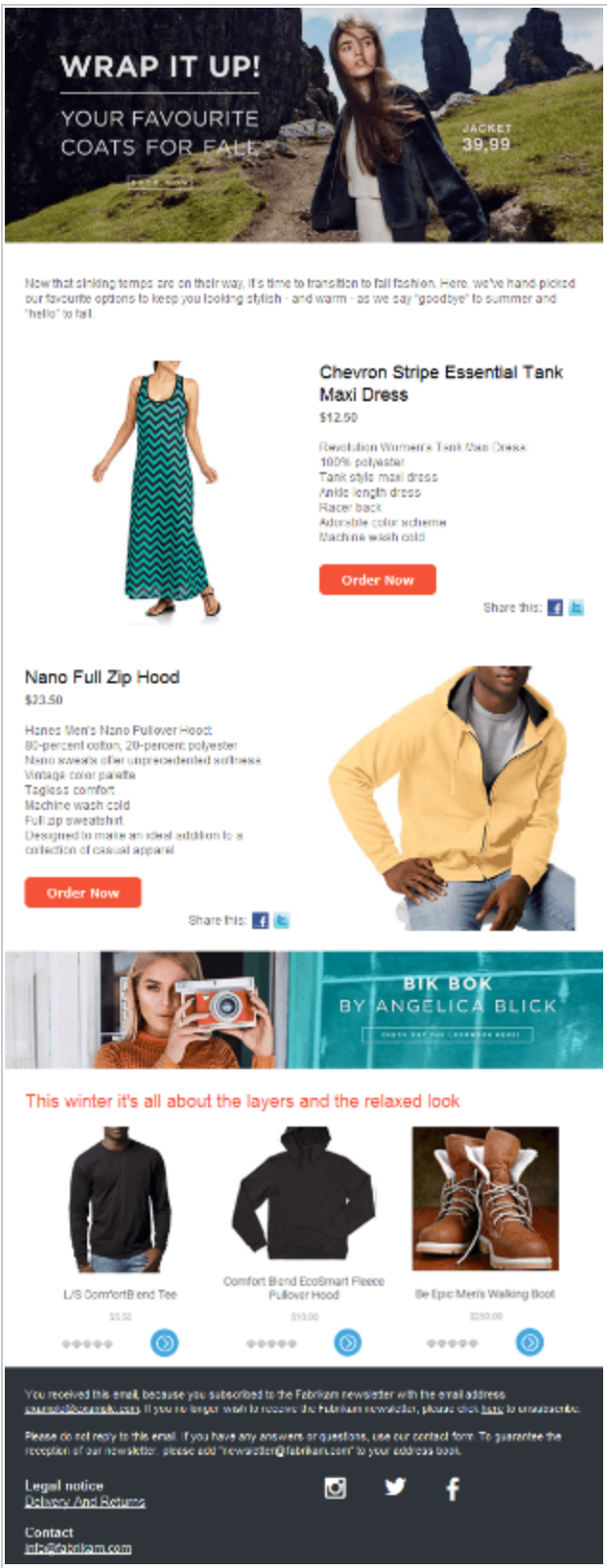

The desktop version of this newsletter constitutes the basis for the mobile version. If the mobile version is activated, all paragraphs are copied into the mobile version by default.

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Mobile version 1

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This mobile version was created from the desktop version with minor adjustments.

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Mobile version 2

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In this adjusted mobile version, a table of contents is displayed. The two small paragraphs after the editorial were positioned next to each other, both with a width of 50%.

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Mobile version with errors

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This mobile version contains typical errors. You should always check the mobile view of your newsletter and, if possible, test it using mobile devices in order to avoid such mistakes.

The width of this paragraph was set to 50%, the width of the following paragraph, however, remained unchanged. This causes the first paragraph to only occupy one half of the available width and creates a gap next to it. If both paragraphs are supposed to be situated next to each other, the width of the following paragraph has to be adjusted in such a way that both add up to a sum of 100%.

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Attachments

This function provides an overview of all the images and attachments saved in the Episerver Campaign content database and allows you to edit them.

→ To open the content overview, open the start menu and in the Campaigns menu, click **Attachments**.

You can perform the following actions:

New

Edit

Delete

Deselect

New

→ Click New to open the wizard for importing an image or attachment. For more information, see the sections Add image or Add attachment.

✔ The content list is reloaded and the dialog is closed after the process is finished.

Edit

→ 1. In the overview, click an image or attachment.

→ 2. Click Edit .

✔ The **Edit Image**/**Edit Attachment** window opens.

→ 3. Enter a new file name for the image or a new file name and a description for the attachment.

→ 4. If you want to change the file - i.e. using another file (by uploading a new file or specifying another URL) - click Previous to make your change accordingly.

→ 5. Click Save .

✔ The content list is reloaded and the dialog is closed after the process is finished.

Delete

→ 1. In the overview, click an image or attachment.

→ 2. Click Delete .

→ 3. Confirm the deletion.

✔ The file is deleted.

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Deselect

➔ Click Deselect to deselect the image or attachment.

Categories

➔ Click the **Image** tab to display all images or click the **Attachment** tab to display all attachments.

✔ All files of the chosen category are shown in a list on the right side of the window.

Images

If you selected the **Image** tab, the overview displays the following information:

- **Name**: The name you gave the file.
- **URL**: Where the image is stored. If it has been physically uploaded to Episerver Campaign, then it will be an **internal** URL (http.//img.example.com/...). If you selected **Use URL**, the original URL of the file is shown.
- **Width/Height**: The dimensions of the image (measured in pixels).
- **Location**: Indicates whether the image is stored on Episerver Campaign (server) or is located externally.
- **Preview**: Shows a preview of the image (scaled down in most cases).

Attachments

If you selected the **Attachment** tab, the overview displays the following information:

- **Description**: The attachments' descriptions you entered to differentiate between them.
- **File name**: The file name you chose.
- **URL**: If you selected **Use URL** while importing the attachment, the address of the file is shown here. If the file was physically imported into Episerver Campaign, then this field is empty.
- **Location**: Indicates whether the file is stored on Episerver Campaign (server) or is located externally.
- **Type**: Shows the format of the file (PDF, DOC, etc.). This is the original format of the file as it was recognized by Episerver Campaign when the file was added, not the ending which you chose for the file while naming it. The name you gave the file should have the same ending as the actual file, so that the recipient of the mailing is not confused.
- **Size**: Shows the file size in bytes. 1,024 bytes are one kilobyte (kB); 1,024 kB are one megabyte (MB). You must keep an eye on the file size, so that recipients are not annoyed with attachments that are several megabytes in size.

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Add image

This window allows the import of images into Episerver Campaign. These are later available when new mailings are created. They can then be integrated into the email with a single click.

To import an image, perform the following steps:

1. Open the start menu and, under **Campaigns**, click **Attachments**.
2. Switch to the **Image** tab and click New.
3. Select whether you want to upload an image from a file on your hard drive or from an URL:
   - **Upload from hard drive**: Select this option to upload an image from your hard drive to Episerver Campaign. In this case it will still be available even if your local version no longer exists.
   - **Use URL**: With this option the corresponding image will not be physically imported into Episerver Campaign. In fact, the web address is entered where the image is currently found. Later only a link to the image will be integrated into the mailings. This option should be only chosen if the image will definitely still be available at the same address at that point in time. If this cannot be guaranteed, then the first option is a better choice, as otherwise a broken image icon may appear in the mailing instead of the image.
4. Click Next.
5. If you selected **Upload from hard drive**, click Browse and select the desired file from your hard drive.

   If you selected **Use URL**, enter the web address where the file can be found, beginning with http://.

   In both cases the file format must be .gif, .jpg/.jpeg or .png.

6. Click Next.

✔ A progress bar indicates that the file is uploaded. This may take a few seconds depending on the file size.

7. In the **Image name** box, enter a meaningful name which allows you to easily recognize the image when creating a mailing or in the content overview.
8. Click Save.

✔ The image is added to the content database of Episerver Campaign.

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Add attachment

This window allows the import of any files into Episerver Campaign. These are later available when new mailings are created. They can then be integrated into the email with a single click.

To import attachments, perform the following steps:

1. Open the start menu and, under **Campaigns**, click **Attachments**.
2. Switch to the **Attachment** tab and click New.
3. Select whether you want to upload an attachment from a file on your hard drive or from an URL:
   - **Upload from hard drive**: Select this option to upload a file from your hard drive to Episerver Campaign. In this case it will still be available even if your local version no longer exists.
   - **Use URL**: With this option the corresponding file will not be physically imported into Episerver Campaign. In fact, the web address is entered where the file can currently be found. Later only a link to the file will be integrated into the mailings. This option should be only chosen if the file will definitely still be available at the same address at that point in time.
4. Click Next.
5. If you selected **Upload from hard drive**, click Browse... and select the desired file from your hard drive.

   If you selected **Use URL**, enter the web address where the file can be found, beginning with http://.
6. Click Next.

✔ A progress bar indicates that the file is uploaded. This may take a few seconds depending on the file size.

7. In the **File name** box, enter a meaningful name. You can of course keep the original file name, but keep in mind that recipients who receive the mailing with the attached file might find it confusing, if the file has a cryptic name. The file name "20181108_pricelist_complete_emea.pdf" could, for example, be changed to simply "pricelist.pdf". The file extension should definitely be kept (for example, .pdf or .doc), so that the recipients can recognize what type of file format they are dealing with.
8. In the **Description** box, enter a description of the file.

The description is used internally and is not part of the mailing.

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→ 9. Click Save.

✔ The file is added to the content database of Episerver Campaign.

Personalized Attachments

The personalized attachments enables you to send individual attachments to particular recipients. Before sending, these attachments must be transmitted to Episerver Campaign using the HTTP-API. The uploaded attachments can be used when sending transaction emails.

Using this feature you can, for example, easily and automatically send invoices and order confirmations to your recipients. For more information see the HTTP API documentation.

Prefix or suffix subject line

This add-on automatically adds a prefix or suffix to the subject line of any mailing. For instance, the suffix "TEST" may be added to each test email subject line.

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

Upload file

With this add-on you can upload a file (e. g. a CSV file) manually into your Episerver Campaign client. This functionality can be used as an alternative to the automatic file exchange via FTP API, in cases where the automatic exchange is not possible. The uploaded file can contain any content and will be processed internally according to the file name and the processes and jobs associated with this file name. For instance, upload product data if you are using a content interface and update product details manually.

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

Update mailing content prior to dispatch

Between the creation date of a mailing and the dispatch date may go by a couple of days. This may cause some of the content that was imported at creation to be out-of-date at dispatch. For instance, a product may no longer be available. This add-on verified automatically the content that was imported into the mailing when it was created. Product information is validated with the help of a unique product

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ID. Should a product not be available at dispatch or should some product information be incorrect, the sending is paused automatically.

This add-on requires a content interface.

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

Publish mailing

This add-on publishes a mailing or parts of a mailing into another client and/or another template. It is a useful and comfortable tool to re-use content from an existing mailing in another context or client.

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

Video emails

Incorporating videos into a mailing is an interesting way of getting the recipient's attention and surprising them with your creativity. Videos are better than static text and still pictures at showing a recipient what he wants to know, in very little time and without requiring even a single word. Videos convey the actual value of your products much better. For example, using a 360 degree view, you can demonstrate the features and design of a new product. Videos are also a great tool for obtaining higher response rates and for guiding recipients to specific landing pages.

Tips for your video emails

- An email teaser should be no longer than 20 seconds.
- Landing page videos should be no longer than 60 seconds.
- Rapid intercutting between images attracts greater attention.
- Use animation in intros, animate info graphics and transitions.
- Place a call-to-action at the end of a video.

Tools for incorporating videos into emails

Owing to the security settings used by email programs and providers, the Flash format widely used in the internet is not a suitable option for videos in emails, since Flash applications are blocked by most email programs. However, there are other means for incorporating moving images into emails.

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Animated GIF

This is the best format for showing a video directly in an email, because many email programs can play GIFs without difficulty. Compared to other formats, the quality of animated GIFs is limited and they do not allow audio playback.

Advantages	Disadvantages
» Videos run directly in an email » Broadly supported by current email programs and webmailers » Unsupported email programs (e.g. Microsoft Outlook) display the first frame as a fixed image (fallback)	» No audio » Limited quality (in terms of color intensity, image frequency) » No compression (i.e. file size increases proportionally with frame rate, each individual image is stored) » No control elements

A comparison of advantages and disadvantages shows that animated GIFs can be used primarily as teasers lasting only a few seconds. If you want to incorporate full videos, animated GIFs can be provided with a playback button linked to a landing page. There should be a reference in the email explaining that there is no audio playback.

Landing page

Rather than integrating a video into an email, you can instead insert a screenshot from the video (e.g. the opening image) into a newsletter, along with a playback button. This static image is linked to a landing page containing the actual video. You can couple this variant with an animated GIF as described in the previous tab. The recipient sees a moving image in the email with a teaser lasting several seconds. If he/she clicks on it, the actual video starts running in the landing page on the web browser.

Advantages	Disadvantages
» Supported by all current formats (Flash, MP4, HTML5) » Practically unlimited video length and quality » Video and audio » Control elements may be used	» Large videos or high click rates require a hosting service » This sort of "fake player" can irritate recipients, who may expect the video to run in the email

This variant is the simplest way of linking videos and emails. It does not require videos to be adjusted to your newsletter's specific format. There are no limitations in terms of formats, image size or image quality. To deal with those cases where recipients have set their email programs to not display images, you should always include a text link to the video in addition to the fake player. To avoid any irritation

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caused when the video begins running in the browser rather than in the email, you can include a note indicating that the video will run externally.

YouTube videos

Several email programs (Google Mail, Outlook, Yahoo) allow videos hosted on YouTube to be played back directly in an email.

Advantages	Disadvantages
» Videos are hosted on a widely used platform » Supported by many email programs (playback in the email)	» Video URLs may not be substituted with tracking URLs, to ensure reliable identification » Identified URLs are extracted; does not allow incorporating the player into email

Videos recognized by email programs are displayed across or at the bottom of the body of an email. If the recipient clicks on the link, the video will generally start running in a layer (Lightbox).

HTML5 video

HTML5 is becoming the standard, even with email programs. Mobile devices in particular, like iPhones and iPads, will run videos in their email programs.

Advantages	Disadvantages
» Allows embedding of high-quality videos. » Audio track. » Displays control elements.	» Not yet supported by many email programs. » Only useful as a supplement in combination with other options.

HTML5 videos can be combined with animated GIFs or a landing page to enable all recipients to play back videos. HTML5 video tags as well as an image tag with an animated GIF or fake player are incorporated into the email source code. The relevant variant is then delivered to the recipient, according to the type of email program he/she uses. Insert the HTML code snippet directly into the email, for example into the source code paragraph of the Template Kit.

PlayUp! video email

The PlayUp! video email of our partners at United Internet Dialog GmbH is aimed at those recipients who have email accounts with GMX, WEB.DE, T-Online or Freenet. You must be accredited as a sender to use this service. The videos run directly in an email the moment it is opened.

Advantages	Disadvantages
» Allows embedding of high-quality videos » Audio track	» Requires sender accreditation » Limited coverage, approx. 50% in

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Advantages	Disadvantages
» Sender retains full control over playback » High promotional effect through immediate playback the moment an email is opened	Germany » Only available to German internet service providers » More overhead involved in laying out a version for other recipients

If most of your recipients have email accounts with the service providers listed above, then this may offer an attractive alternative for sending out video emails. However, a mailing would have to contain a second variant for all those recipients who do not have an email account with these providers. This means additional expense and effort in developing a second set of mailings.

We would be happy to provide additional information to those interested in this service. You can subscribe to the service through Episerver.

Testing and evaluation – Finding the right technical implementation

To give your video email strategy the greatest possible chance of success, you can test how well each integration method works by applying split tests to a representative sampling of your recipients. This is an easy way to determine which approach is the best means for embedding videos and which offers the highest conversion rates.

The chart below shows a split test with results for all the variants described above.

Video embedding	Split A	Split B	Split C
Animated GIF and landing page	✓	✓ *	✓ *
Landing page with embedded video	✓	✘	✘
HTML5 video	✘	✓	✘
Youtube video	✘	✘	✓

Reporting

Evaluating clicks on video links is easy using conventional tracking. Depending on the technique being used, it is also possible to collect data on playback time and playback rate. At a minimum, you should measure conversion and click-through rates to evaluate the effectiveness of your videos. In particular, the following steps/actions should be assessed:

- Recipient clicked on the landing page in the newsletter
- Recipient ran video (web analysis accessibility required)
- Time spent on landing page (web analysis accessibility required)

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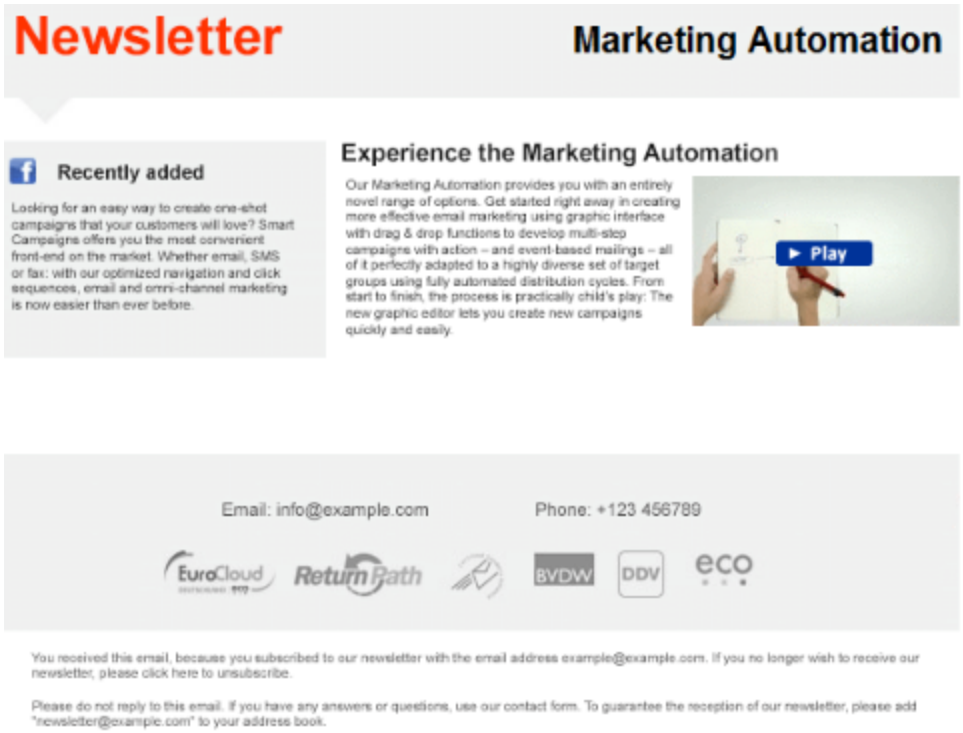
To assess how many recipients made a purchase after viewing a video, you will need to set up a segment in your web analysis software that links two actions:

1. Recipient made a purchase in the product category
2. Incoming page (i.e. the page clicked on to reach the product page) equals video landing page

* The animated GIF should be included as a fallback option; all recipients who cannot display the embedding variant used will only see an animated GIF.

Incorporating videos into a mailing

In our example, we will use as a mailing containing an animated GIF teaser that links to a landing page with a full-scale, high-quality video. The animated GIF was created from a short sequence taken from the video and loaded into the mailing as a normal image file. This animated GIF was set in a text/image paragraph, together with the teaser text. The mailing would appear this way in an inbox:



The animated GIF is linked to a landing page. The full, high-resolution video is integrated into this landing page. The video itself can be hosted on YouTube, Vimeo or other hosting services. These services supply a snippet of code that you simply insert into the source code:

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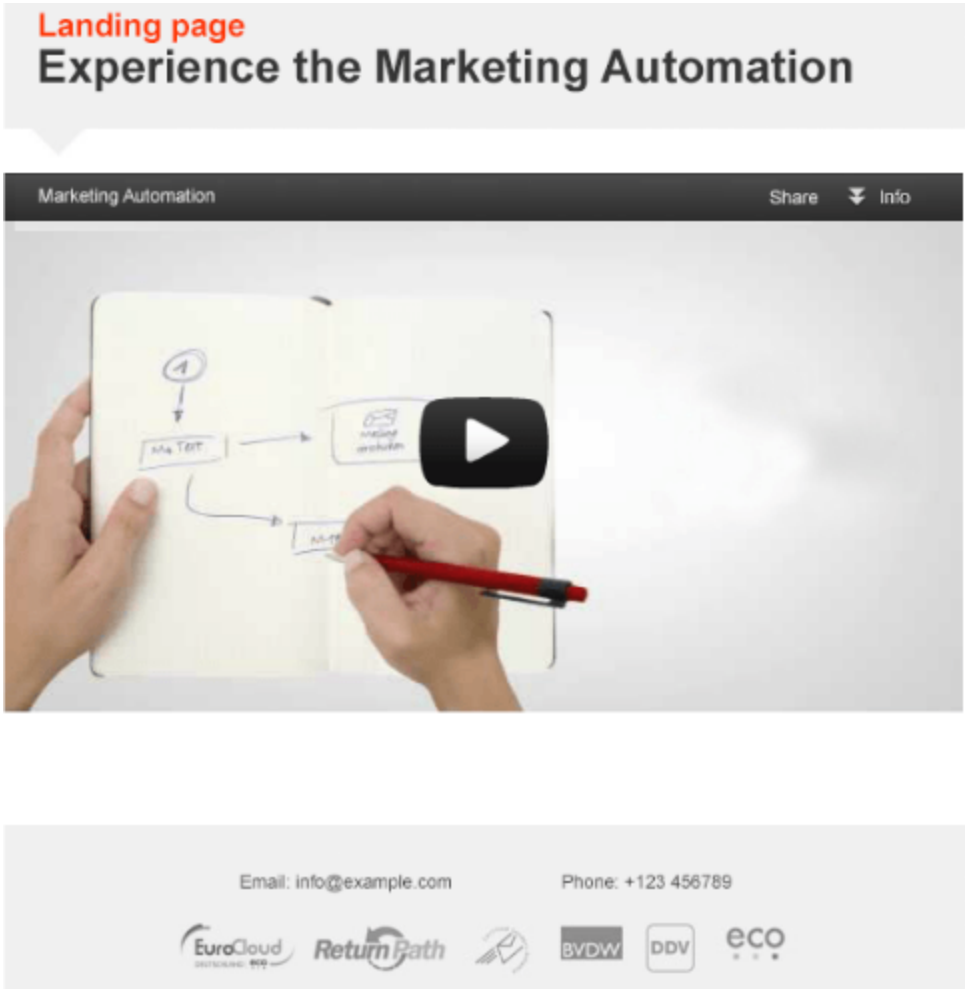

How to create a video mailing with an animated GIF and landing page:

1. The video must be of a standard format. Best results can be obtained using the widely available and high-quality MP4 format.
2. Load the video to a hosting service (e.g. YouTube or Vimeo), if you are not hosting it yourself.
3. Create an animated GIF to use as a teaser. Animated GIFs can be created using standard editing programs like Adobe Photoshop or other specialized programs.
4. Set up a mailing in the client where you wish to insert the teaser.
5. Create a landing page based on this mailing.
6. Switch back to the mailing and insert a text/image paragraph. Upload the animated GIF in the Image tab and compose the paragraph in the usual manner.
7. Select the landing page from the list in the **Link** field.
8. If needed, add a note indicating that the video will open in an external browser window.

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9. Now switch to the landing page and insert a source code paragraph containing the code snippet that embeds the video. You can get this code snippet from YouTube by going to the video and clicking **Share** and then **Embed**. You can get the code from Screencast by moving your mouse onto the video icon and then clicking **Share** .
10. Save and test the mailing.

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Newsletter design

Best practice in newsletter design

Using templates you can easily create mailings in a CI-compliant layout – with no graphics or HTML skills required. Templates offer you the flexibility you need by allowing you to design each element individually. And you do not have to worry about losing your overall layout, because templates store all settings inherited from higher-level elements. But templates show their full potential in the preparation of text and mobile versions of your HTML mailings – which effectively are generated automatically as you go, i.e. in the background. You do not need to do a thing – though you always have the option of stepping in, if need be, to edit each version individually.

The benefits of working with templates

- **Flexible design**: Our intuitive templates offer you an enormous amount of creative freedom. Pixel-precise layout presets, variable columns and content blocks/lists that you can arrange in any way you like provide for compelling design options.
- **Easy customization**: Effective adaptations thanks to dynamic content: With our templates you can send customized information to specific target groups or create entirely personalized email campaigns.

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- **Many additional features**: Our templates are characterized by their exceptional price-performance ratio. You benefit from numerous additional functions available for design and customization, all of which can be adapted to your specific needs at any time.
- **Tested templates**: Our content templates are tested for use with a variety of email programs, webmailers and browsers. You can choose between a universal template kit or templates customized to your specific needs.

Template Kit or custom template?

If you choose a newsletter template, you can select between our universal Template Kit at a fixed price or a customized mailing template. This comparison shows you the relative advantages of each:

- The advantages of the Template Kit
- The advantages of a customized mailing template

The advantages of the Template Kit

- Can be configured in just a few steps - With the Template Kit you can start creating mailings right away. The basic configuration only takes a few minutes.
- A versatile design tool at a fixed price - The Template Kit lets you create perfect newsletters at low cost. And you can adapt the Template Kit to your specific needs.
- The Template Kit grows with your needs - right along with your company. Simply transfer a new corporate design into the Template Kit and your email marketing is immediately in line with your company's new look.
- Second to none in terms of versatility - The Template Kit is ready to take on any challenge. You can use the Template Kit to create and send entirely new campaign designs, special campaigns or transactional emails.
- Integrated mobile version.

The advantages of a customized mailing template

- Custom-made newsletter designs - A customized mailing template fits like a tailor-made suit. Your design guidelines are transposed with pixel precision. Editing is exceptionally easy since there is nothing you can do wrong. Each and every element can only be inserted right where it belongs. Elements and parameters can be disabled during editing so that your editors can only work on selected content.
- Infinitely upgradable - Individualized mailing templates can be expanded to include additional functions. These include a content interface that automatically loads content from a database; feed-based mailings that automatically incorporate content from RSS feeds; personalized

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images and many other features that can be seamlessly integrated into the customized mailing template.

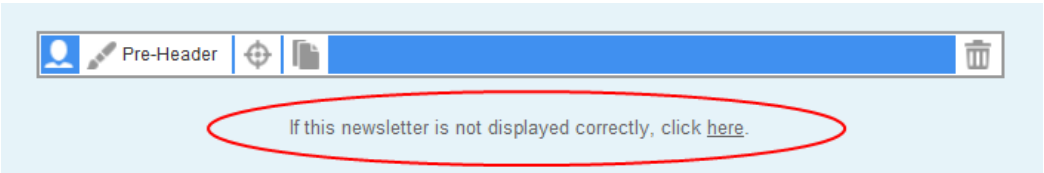
Layout fundamentals

Each paragraph in a template and, depending on the configuration of the template, even the template itself provides a range of design options that can affect the layout of your newsletter:

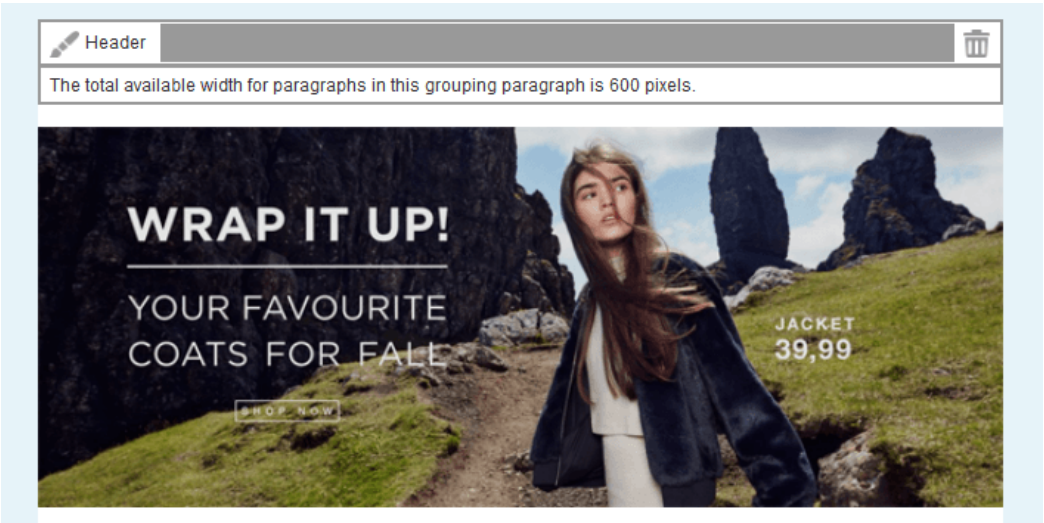
- Background coloring of the newsletter and newsletter background
- Width of the newsletter
- Number of columns in a newsletter
- Margins and spacing of individual paragraphs
- Background color or images incorporated into individual paragraphs

Examples and comments

- **Pre-Header**: The pre-header contains a link to the online version. You can add additional pre-headers to display information more prominently so that it is more likely to catch the reader's eye.



- **Header**: The header contains an image and the newsletter's title. Additional elements, such as date and issue, may also be inserted. A graphics editor allows you to incorporate elaborate text effects.



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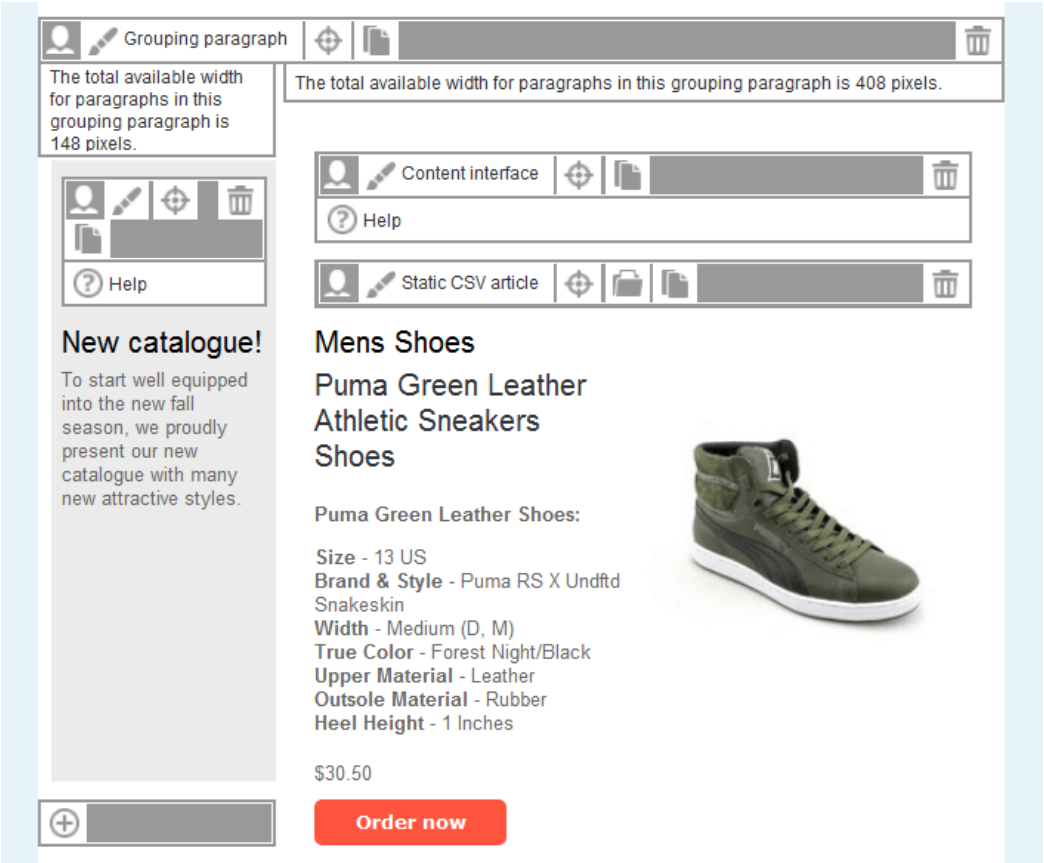
- **Sidebar**: The sidebar produces a two-column layout. In this example, the sidebar has been given a different color to set it apart from the main body of the newsletter. If you choose this type of layout, you will need to set an inner margin to create a space between the box and the text. Similarly, you will also need to set a margin between the sidebar and the main body of the newsletter so that the text/image block in the main body does not "cling" to the sidebar.



- **Main area**: The main area has the same color as the entire newsletter. The text/image paragraph runs across the total available width and does not require an inner margin. The image is centered between the title and the text. A teaser text links to a landing page.
- **Table of contents**: The table of contents is a separate type of paragraph and can be placed anywhere in the template. A table of contents can also be set in a fixed position in individual mailing templates. You can enter the text that the table of contents displays into the individual paragraphs - or simply use the paragraph headings (standard).
- **Empty column**: In contrast to a single column layout (see box opposite), the sidebar is left blank, if no content is to be entered.
- **Image position**: Here, the image is positioned on the left next to the heading. Larger images should be scaled down to 50 % of the available width. Images are positioned relative to text, link and heading. If you choose to position an image to the left below the heading, as opposed to the

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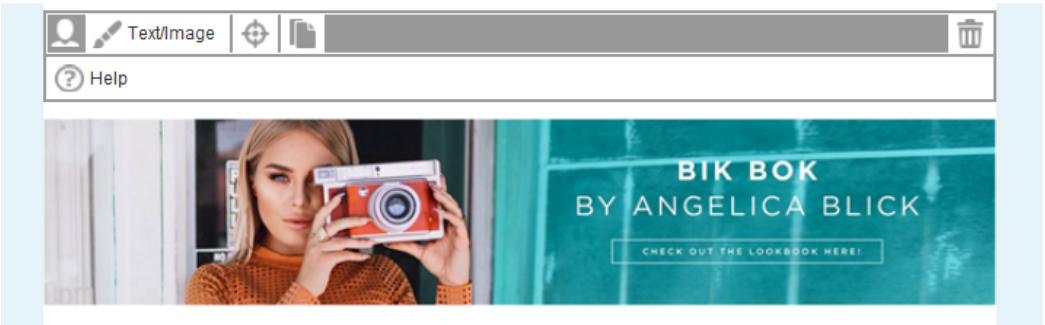
position shown here, then the heading will not be incorporated, which means it will appear across the full width of the paragraph.

- **Inline block**: Paragraphs with narrower widths are placed next to one another until the maximum width has been filled. This way, it is possible to create a layout with consecutive, variable columns. If the width is set to a particular portion of the total available width, then the individual blocks fill out the space precisely as indicated, generating a column layout as shown here.
- **Single column**: With a single-column layout, a paragraph spans the entire width of the newsletter. To create a template with a variety of layouts (e.g. single-column or two-column), you will need to use paragraph outlines or special paragraphs.



- **Background color**: A single background color (the same as used for the sidebar) was chosen for these paragraphs. An inner margin must be set to add space between the text block and the paragraph frame.
- **Variable footer**: A footer can contain multiple paragraphs. Footer paragraphs can be treated in the same manner as content paragraphs, as here - or fixed in place, as described in the following paragraph.
- **Fixed footer**: This footer contains the site notice and contact information for the newsletter. This usually also includes the unsubscribe option required by law. The paragraph is permanently stored and normally does not need to be adapted or edited further.

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Recipients

In this chapter you'll learn how to manage and edit active and inactive recipients. Furthermore, we guide you through all the steps required to generate target groups in Episerver Campaign and send personalized content to different customer segments.

- Recipients: Managing, importing and editing recipients.
- Recipient lists: Copying, editing and clearing recipient lists.
- Target groups: Generating, utilizing and analyzing segments.
- Opt-in: Information on the opt-in procedure.
- Recipient history: Displaying mailing progress with individual recipients.
- Export mailing and performance data: Exporting response data as CSV or XML.
- Click profiles: Creating, editing and assigning click profiles.
- Returned emails - Overview: Viewing bounces and replies.
- Blacklist overview: Managing the blacklist.
- Change email addresses: Changing recipient ID.
- Export recipients by category: Exporting recipients to a CSV according to category.
- Import recipients by category: Synchronizing recipients from external sources with Episerver Campaign.
- Preference Center: Linking Preference Center to Episerver Campaign.

Recipients overview

The recipient overview gives you access to all functions needed for working with your recipient datasets.

➜ To open the recipient overview, open the start menu and, under **Recipients**, click **Overview**.

Show recipient datasets

To show recipient datasets, you first need to select a recipient list.

➜ In the list, select the desired recipient list.

✔ The datasets are then displayed.

The selected recipient lists can be changed at any time, should you wish to view datasets for other lists.

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Filter datasets

→ To filter the selected datasets, select a target group from the **Target group** list and click Apply .

Search dataset

→ To search for a recipient or key word within a dataset, enter a search term into the **Free text** search box and click Apply .

Manage recipient lists

The following actions can be performed using the buttons below the list in the **Recipients** area:

- Create recipient
- Edit recipient
- Delete recipient
- Blacklist recipient
- Anonymize tracking
- Download recipient

Create recipient

To create a new recipient within the selected list, perform the following steps:

→ 1. Click Create recipient .

✔ An empty row with input boxes appears in the list

→ 2. In these fields, enter the data for the new recipient.

Grayed-out fields cannot be modified.

→ 3. Click Confirm to save the entered data.

Do not be concerned that you cannot see the newly entered recipient data in the list after saving it. The list is automatically re-sorted by Episerver Campaign when saving. For more information on this, see Add element.

Edit recipient

To edit a recipient, perform the following steps:

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1. Select a recipient from the list and click Edit recipient.
✔ All data fields that can be modified will change to input boxes. Other fields cannot be modified.
2. Click Submit to save the changes.

Delete recipient

To delete a recipient, perform the following steps:

1. From the list, select a recipient and click Delete recipient.
2. In the dialog box that appears, confirm that you do indeed want to delete the recipient.

This function should only be used to tidy up recipient lists, e.g., to remove an individual recipient whose email address does not exist. Recipients who should no longer receive emails from you due to a complaint should be added to the blacklist.

Blacklist recipient

To prevent a user from receiving any further messages and add him/her to the blacklist, perform the following steps:

1. Select a recipient from the list and click Blacklist recipient.
✔ The **Blacklist recipient** dialog box opens.
2. Optionally, enter a reason for blacklisting the recipient (e.g., complaint by telephone).
3. Click Apply.
✔ The recipient is added to the blacklist.

For more information, see Blacklist overview.

Anonymize tracking

This feature allows you to deactivate personalized click and link tracking for a recipient. This recipient will then not be included in action-based target groups (e.g., "has clicked link B in mailing A"), even if they meet the conditions of the target group. To deactivate personalized tracking for a recipient, perform the following steps:

1. From the list, select a recipient and click Anonymize tracking.
2. In the dialog that opens, confirm that you want to disable personalized tracking for this recipient.

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- Opens and clicks are still saved anonymously and included in global reports. The open and clicks in a mailing of such a recipient would therefore be counted. However, the recipient is not taken into account if you create a target group containing all recipients of this mailing who opened or clicked it.
- All personal action-based data are anonymized from the time of activation. Action-based data from the recipient history is not retrospectively anonymized. When you reactivate personalized tracking, anonymized action data is not restored and assigned to the recipient.

Download recipient

If you have permissions to download recipient lists, you can save all recipients in a recipient list or a selected set of recipients to a CSV file by clicking **Save** at the bottom of the list.

Take care when handling the downloaded data

A recipient list or set of recipients downloaded with this function also contains data for unsubscribed recipients, blocked recipients and recipients for whom the bounce limit has been exceeded. Do not use this dataset for sending messages or mailings from other clients or mailing systems. To export only active recipients in a recipient list, use the Recipient export instead.

Import

There are several options for transferring the email addresses and other data of your recipients to Episerver Campaign. The most common way is to import a file that contains the recipient data. The required file format for importing recipient data into Episerver Campaign is called CSV (Comma Separated Values). This is an international standard format for data exchange employed by almost every database system, as well as by Microsoft Excel . Generally speaking, the file is a text file in which each record is stored on a single line. The individual fields of the record (in this case. email address, title, last name, etc.) are separated by a comma (or semicolon), hence the name of the format.

You may need to export the data from your recipient database, CRM application or the like. If you have any questions concerning this export, ask your IT department.

Test import

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Before performing the actual import, perform a test import to check the data of your recipient list and the correct assignment to a Episerver Campaign recipient list.

If the source file is not in this format or if you want to export the recipient data from your local data base or CRM first, ask your IT department for assistance. If the source file is a spreadsheet file, you can easily convert it into a CSV file. Open the file with your spreadsheet application (e.g. Microsoft Excel), select **Save as** and save the file as .csv file to your local hard drive.

To import your recipient data, perform the following steps:

Step 1: Start

→ 1. Open the start menu and, under **Recipients**, click **Import**.

✔ The **Import recipients** window opens.

→ 2. Click Browse and select the file with the recipient data from your hard drive.

→ 3. Click Next.

✔ The file is uploaded to the Episerver server.

The process may take a few seconds to several minutes depending on the size of the file. If you regularly import large files with several hundred thousand recipients and are not comfortable with the waiting time, consult Episerver support.

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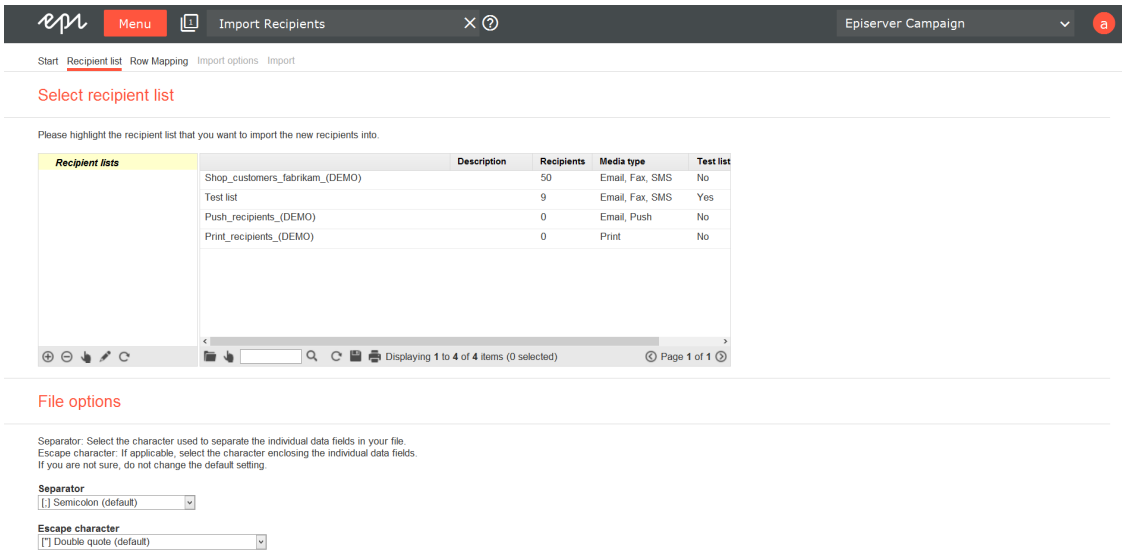
Step 2: Recipient list



1. In the **Select recipient list** area, click the recipient list into which you want to import the new recipients.
2. In the **File options** area, specify the characters your CSV file uses to separate the entries. If you are not sure about the settings, try the default settings or contact your IT department for assistance.
   - **Separators**: Select the character (semicolon, comma, tabulator, etc.) that separates the data fields on the individual lines of the uploaded file. In most cases, this is a semicolon.
   - **Escape character**: Some database programs use a single quote (') or double quote (") around each data field when exporting. Select which one is used in the uploaded file. In most cases, you will use the double quote.
3. Click Next.

You cannot add new recipient lists. New recipients are always added to an existing recipient list.

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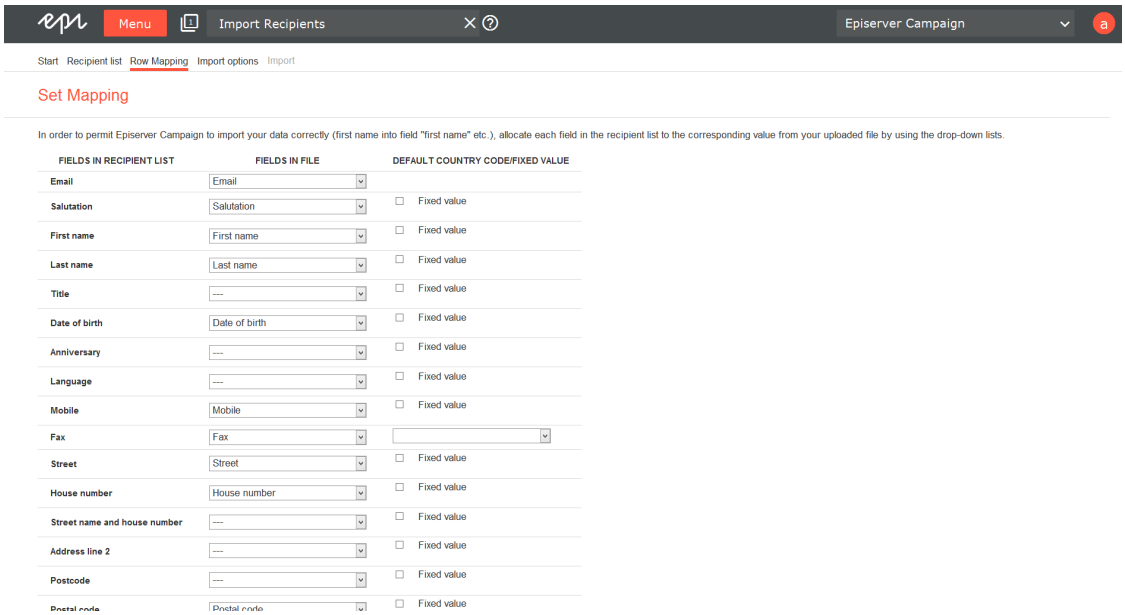
Step 3: Row mapping



To process the data correctly, each column of the recipient list in Episerver Campaign must be assigned to the corresponding column in your imported recipient list.

The left column of the **Row Mapping** tab lists all fields of the Episerver Campaign recipient list into which you are importing the new recipient data. The lists on the right contain all column headers that exist in the imported list. Assign the fields according to their content.

In most cases, you will not have to do anything. Episerver Campaign automatically suggests the correct assignment and detects that, for example, "first name" corresponds with "first name". However, if "first name" in the recipient lists corresponds to "name" in the file, you have to select the correct assignment.

If you prefer to import the data fields selectively (hypothetical case in which only the last names of the recipients have changed and the rest is unchanged), select the option **---** for all recipient list fields that are not to be changed. Next to each line, you will find a **Fixed value** check box. When you select this box, the pop-up menu for field selection changes to an entry field in which you can enter any text or value. This value or text will then be imported into the corresponding field for each record.

Next to each line, you will find a **Fixed value** check box. When you select this check box, the pop-up menu for field selection changes to an entry field in which you can enter any text or value. This value or text will then be imported into the corresponding field for each record.

This option can be very helpful if, for example, you generate email addresses for your newsletter subscribers not only through your own website but also from other sources (cooperation partners, etc.). If you import records supplied by a cooperation partner, you can use the **Origin** field to indicate the

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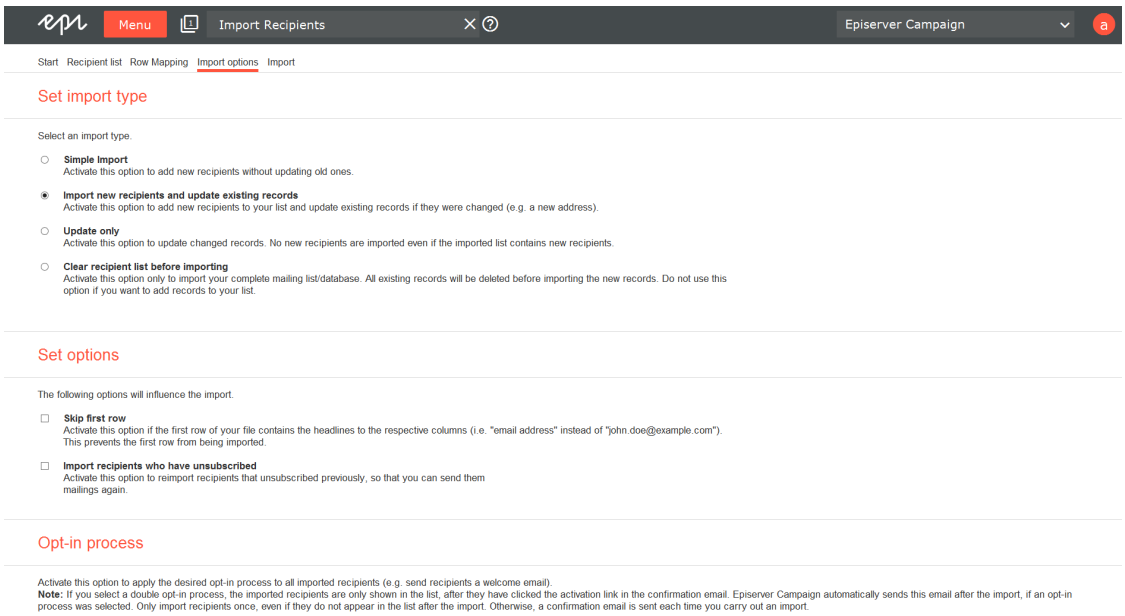
partner's name or a corresponding code. In this way, it is possible to track where the subscription originated. It also becomes possible to evaluate the activity of subscribers from various sources.

If your recipient list also contains fax and mobile numbers, you can also enter a country code for these fields during import if the imported numbers do not contain those. The country code is automatically prepended to the telephone number, and the telephone number may be standardized (eliminating the 0 before the area or network code).

Once you have made all settings, click Next.

Step 4. Import options



1. In the **Set import type** area, select the import type.

   Depending on the configuration of your client and your user authorization you may not find all of the following options:

   - **Simple import**: This option imports new recipients into your list. Existing records, unsubscribes or blacklisted recipients are skipped.
   - **Import new recipients and update existing records**: This is the default import type. New recipients are added to the recipient list. The existing records are checked and if changes are found, they are updated. Note that Episerver Campaign identifies recipients by recipient ID, usually the email address. If a recipient's email address has changed, he will be imported again, since Episerver Campaign does not recognize him as an existing recipient.
   - **Update only**: This option does not import new recipients into your list. It checks the existing records for changes and updates them. Note that Episerver Campaign identifies

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recipients by recipient ID, usually the email address. If a recipient's email address has changed, he will be skipped, since Episerver Campaign does not recognize him as an existing recipient.

- **Clear recipient list before importing**: This option allows you to completely overwrite the existing recipient list in Episerver Campaign with the new data from the uploaded file. For this reason, it is only suitable if you upload your complete address data. This can be practical if recipients have the opportunity to unsubscribe both by clicking in the newsletter as well as through the call center. In this case, the unsubscribe information must find its way to Episerver Campaign so that these recipients are immediately unsubscribed and will not receive further mailings. If your call center deletes a record from your database or CRM software, you can guarantee that this recipient is truly deleted by selecting the **Clear recipient list before importing** option.

2. Select one or more of the following import options:
   - **Skip first row**: Usually, the file you upload will have the names of the fields in the first row (i.e. "emailaddress", "firstname"). If you check this option, importing starts with the second row and the table head is skipped.
   - **Import unsubscribed recipients**: If your client is configured accordingly and this option is displayed, you can import recipients who are marked as unsubscribed in your Episerver Campaign client. The newly imported recipients will receive mailings right after importing them with this import option.

Be aware that permission is required for all recipients. If no permission (opt-in) exists, unsubscribed recipients must not be sent newsletters to anew.

3. If you want to import recipients from a source that is not linked to an automatic opt-in process, for example from a telephone campaign, you can add an opt-in process here. Imported recipients will receive a welcome or a confirmation email with an activation link. This option can only be selected if the confirmation mailing has been set up and edited beforehand.

Only import recipient lists once

If a double opt-in process was selected, the imported recipients are only shown in the list, after they have clicked the activation link in the confirmation email. Episerver Campaign automatically sends this email after the import, if an opt-in process was selected. Only import recipients once, even if they do not appear in the list after the import. Otherwise, a confirmation email is sent each time you carry out an import.

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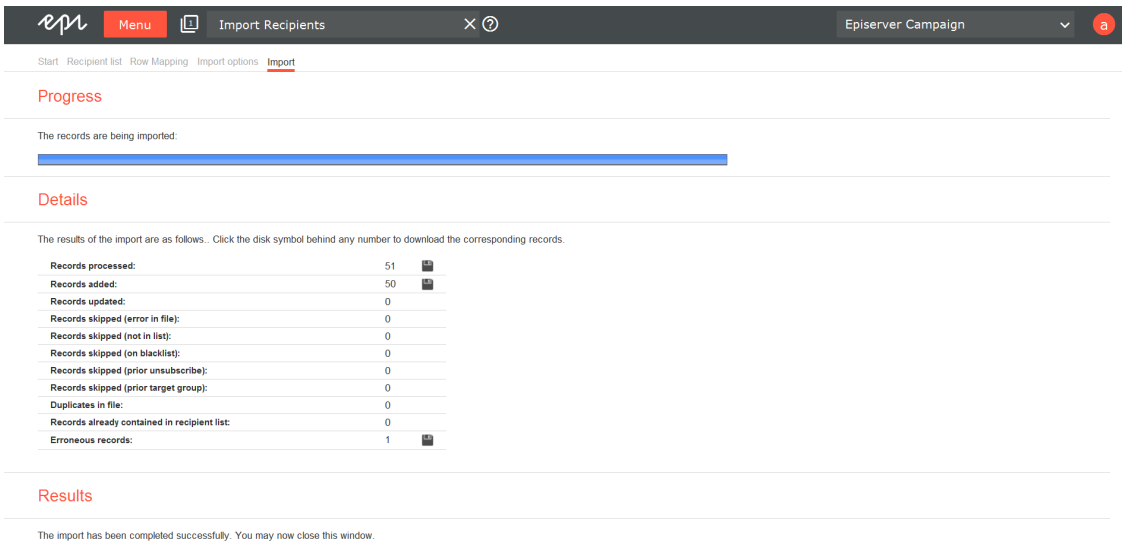
4. Click Import.

The Import starts and the **Import** tab opens.

Step 5: Import



The actual import into the recipient list occurs in this step. The number of processed records and the import result is listed for each category:

- **Records added**: Shows the number of newly added records.
- **Records updated**: Number of updated records.
- **Records skipped**: Number of skipped records, because they already existed, no changes were found or because you selected the option **Update only** and new records where found in the list.
- **Records skipped (error in file)**: In these records, the column assignment did not correspond with the selected values in the third step, e.g., the field "email address" did not contain a valid email address.
- **Records skipped (prior unsubscribes)**: Recipients that are already unsubscribed.
- **Records skipped (on blacklist)**: Recipients that are blacklisted. Depending on your client hierarchy, there might be several blacklists. A blacklisted recipient might not appear in the blacklist of your client, but be blacklisted on the list of the main client.
- **Records skipped (prior target group)**: The recipients were not imported because your client or the confirmation email (confirmed or double opt-in) uses target group(s) which do not match.
- **Duplicates in file**: These recipients are only imported once to avoid duplicates in the recipient list.
- **Records already in recipient list**: Recipients that are already listed in the recipient list are skipped to avoid duplicates.

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- **Defective records**: Episerver Campaign automatically validates email addresses when importing them. It checks, for instance, whether an email address contains an @ symbol, a valid domain or invalid characters. Records with invalid email addresses are not imported.

When the import is finished, the program displays a floppy disk symbol next to each category for which records were found. Click the symbol to download the respective records. This can be useful, for example, to know, whether invalid email addresses are caused by a recording error or whether the recipient submitted an invalid email address at subscription.

Trial import

This function is useful if you would prefer to first run though the recipient list before actually importing. This is one way of determining how many recipients in a file are already recognized by Episerver Campaign and which ones are new. Greatest disparity from actual import: With a test import, absolutely no changes are made to the recipient list.

Perform the following steps:

1. Open the start menu and, under **Recipients**, click **Trial import**.
2. Proceed as described in Import.
3. You also get a statistic with the number of imported recipients, duplicates, invalid email addresses and so on.

Unlike the import, no changes are made to the recipient list during the test import. However, you can still download the analyzed records to filter out duplicates or invalid email addresses. To do so, in the overview, click on the diskette icon next to the corresponding category .

Export

You need special user rights to use this function.

With this function, you can export recipients by their status into a CSV file. The following statuses can be selected:

- Active recipients
- Unsubscribes
- Blacklisted recipients
- Recipients who exceeded the bounce limit

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To export recipients, perform the following steps:

1. Select which recipients you want to export.
2. Click Options.
3. Perform the following steps for the different status:
   - For active and blacklisted recipients: Click on the recipient list whose recipients you want to export. To export only recipients of a specific media type, select the media type from the **Media Type** list (available for active recipients only).
   - For recipients who have exceeded the bounce limit and unsubscribed recipients: Enter a start and/or an end date. If no start or end date is entered, all recipients in the selected status are exported. If you only enter a start date, recipients from that date until now are exported. If you only enter an end date, recipients from the creation of your client until the entered date are exported.
4. Click Finish.

The export of a large number of records may take a while. However, you can start several exports for different statuses simultaneously, but only one export per status.

Cross checking recipients

This section shows you how Episerver Campaign identifies the recipients of a mailing and which internal lists are used for this purpose. If you maintain your recipient list(s) outside the Episerver Campaign environment, this information can help you keep your lists consistent. Contact our customer support with questions regarding the operation and configuration of your client.

Episerver Campaign validates and cross-checks recipient data in the following modules and functions:

- when importing recipient lists
- when calculating recipients for a mailing
- when sending out a mailing
- when editing the blacklist

The following lists, managed internally by Episerver Campaign, also impact on the validation of recipients for mailing dispatches:

- unsubscribe list
- bounce counter

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When importing recipient lists

Duplicates

Any time you import a recipient list, Episerver Campaign checks whether the records being imported are already on the list. Any duplicates identified are not imported. In addition, duplicates within the CSV files being imported are checked for (e.g., due to incorrect copy & paste when the list was created). These records will only be imported into the recipient list once.

If you select the **Clear recipient list before importing** option, the list will not be cross-checked since it was deleted before any data was imported. If you select the **Import new recipients and update existing records** option, the existing records will not be treated as duplicates and will instead be overwritten with the new values.

Blacklist

All records being imported are also cross-checked against the blacklist. Recipients listed on the blacklist, including those serving as a placeholders, will not be imported (see Blacklists).

Unsubscribers

Unsubscribers are included on an unsubscriber list, which usually applies to all clients (though not inherited). In certain instances, unsubscriber lists may be created based on recipient lists and permanently linked to a recipient list. These will, therefore, not affect other recipient lists in the same client.

Unsubscribers are not deleted from the database. Therefore, when importing recipients, it may be the case that recipients are included in the file being imported who have already unsubscribed from a mailing (e.g., by using an unsubscribe form) and are therefore listed as unsubscribers. These recipients will not be imported a second time.

Incorrect data records

During the import process, Episerver Campaign checks email addresses based on formal criteria. However, formal accuracy does not mean that this address actually exists.

The following criteria are checked:

- An address must contain exactly one @ symbol.
- The local element of the address (before the @ symbol) may not begin or end with a dot.
- No two dots may occur consecutively.
- Blank spaces and the following special characters are not permitted: `( ) [ ] \ ; : , < >`
- The domain element (after the @) of an address must conform to the rules of the domain name system.

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Imported records are also checked to see whether the fields in the recipient list match the columns in the list. If any discrepancies are detected, these records are identified as incorrect and are not imported.

Analysing records that are not imported

Once you have imported a recipient list, you can download the non-imported records as CSV files for each of the categories described above. Using these files, you can manage your original recipient list and keep it consistent.

When choosing recipients for a mailing

Whenever you create a new mailing, you can use a single click to see how many recipients would be sent the mailing at the current point in time. The selection of recipients follows the same criteria and algorithms applied to sending a mailing (see next paragraph).

When sending out a mailing

When you initiate a mailing, recipients are selected based on the following criteria and algorithms:

- Recipients on the blacklist will not be contacted (see Blacklists).
- Unsubscribers will not be contacted.
- Recipients with a bounce overflow will not be contacted.
- Where applicable, target groups and maximum numbers of recipients will be determined.

The following parameters will be evaluated while a mailing is being sent out:

- Email addresses are checked to see if they are formally correct (see Incorrect data records).

Once a mailing has been sent out, returns are then analyzed. Recipient addresses that produce a bounce generate an automatic reply to the return address. These are automatically analyzed by Episerver Campaign. Hard and soft bounces are counted separately for each recipient. Any recipient who has reached the bounce limit for hard or soft bounces will not be contacted again. These recipients are still listed on the recipient list but they will be skipped when mailings are sent out. (see Bounces)

Recipients who click on the unsubscribe link upon receiving a mailing will be placed on the unsubscribe list. These recipients will still appear in the recipient list but will not be sent mailings in future. The unsubscribe list will record the email and a time-stamp as well as the mailing the recipient received when he/she unsubscribed. This makes it easier to track cancellations – in the event of a complaint, for instance.

Bounces

A bounce is generated whenever an email fails to reach a recipient's email server or mailbox. It is meant to inform the sender that the email could not be delivered. Technically speaking, there are two types of bounces: soft and hard bounces.

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Soft bounces

A soft bounce is generated when a mailbox is temporarily unavailable. This occurs whenever a mailbox is full and unable to accept any more emails. Once a user deletes a number of emails, thereby freeing up memory in the mailbox, emails can be delivered to the mailbox again. Soft bounces seldom occur since memory usually is sufficiently large enough to handle high numbers of emails.

Hard bounces

A hard bounce is generated whenever a server address or mailbox does not exist. If this is caused by a technical problem (when a server is down, for instance), the error will be temporary in nature. As soon as the server is back online, the mailbox will be available again. A hard bounce is also generated when a mailbox does not exist (any longer). There may be several reasons for this:

- The email address was intentionally or unintentionally entered incorrectly (even though syntactically correct).
- The user canceled the email account after switching providers.

Bounce counter and bounce limits

Episerver Campaign analyzes all hard bounces and enters them in the bounce list. Bounce limits for soft and hard bounces are set when configuring the client. The standard limit is three hard bounces or five soft bounces, which means that once a recipient has reached this limit, he/she will not receive any further mailings. The recipient has generated a so-called bounce overflow and has, therefore, been bounced out. Bounces are counted across all clients for each recipient.

How can I see how many bounces a recipient has generated?

Bounces cannot be accessed via Episerver Campaign's user interface. If you are using Episerver Campaign with the SOAP API, you can retrieve the number of bounces for a particular recipient using the getBounceCounter method.

Can I view recipients who have generated a bounce overflow?

You cannot view bounced out recipients via the Episerver Campaign user interface. You can, however, use the special feature Download bounce overflows to download bounced out recipients as a CSV file. Contact our customer support for assistance.

If you are using Episerver Campaign with the SOAP API, you can use the isBounceCounterThresholdExeeded method to see whether a recipient has exceeded the bounce limit.

Can I reset the number of bounces generated by the recipient?

You are not able to reset a recipient's bounce count using the Episerver Campaign user interface. Contact customer support if you would like to reset the bounce count for one or more recipients. If you use the SOAP API, you can reset the bounce count to 0 using the resetBounceCounter method.

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If an email account cannot be contacted, does it really matter whether and how often I send mailings to it since it may be reactivated at some point?

That may be true in theory. In practice, however, sending mailings to unavailable or non-existent emails will undoubtedly have negative consequences. These bounces will be saved and analyzed by the internet service provider. If a sender sends out too many emails to unavailable email addresses, the provider will place the sender on a blacklist and treat emails from this sender as spam mails. For this reason, it is better to stop sending mailings to any recipient who has generated three/five bounces.

Blacklists

Blacklists contain recipients who should not be contacted under any circumstance. This includes recipients who have submitted complaints, but also known spam traps and postmaster accounts which are standard for every email account.

Blacklist hierarchy and delegation

Depending on the how a client is structured, it is possible for your client to have one or more blacklists. Entries in a blacklist are inherited by sub-clients from main clients. If you do not have the necessary authorization to access the main client you cannot, therefore, view any blacklists on it. The main client blacklists nevertheless apply to the sub-clients as well.

Placeholders

Note that blacklists, unlike recipient lists, make use of placeholders. Therefore, it may be the case that a recipient you want to import is marked as blacklisted, even though the recipient's email address is not on the blacklist. In this case, a placeholder rule is in effect – blocking all recipients of a particular domain, for instance.

Can I define a blacklist for a single recipient list?

No, a recipient list always applies across all clients.

Can I view blacklist entries in higher level blacklists?

If you do not have authorization to access a higher level client, you will not be allowed to view the blacklist entries on that client.

Can I prevent a blacklist from being inherited by sub-clients or define exceptions?

No. Blacklist entries are inherited by all sub-clients. You may not circumvent this type of inheritance. It is also not possible to define exceptions for blacklist entries.

Unsubscribe lists

Recipients who unsubscribe from a mailing by using an unsubscribe link or de-registration form are marked as unsubscribed. However, they are not deleted and remain visible on the recipient list. When a

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mailing is sent out, these recipients are matched against the unsubscribe list and filtered out.

Can I view the unsubscribe list in my client?

You may not view unsubscribe lists using the Episerver Campaign user interface. There are several ways of retrieving unsubscribers:

1. Using the Download unsubscribers feature, you can download an unsubscriber list as a CSV file through the user interface - to compare it against your own recipient list, for example.
2. If you are using Episerver Campaign with the SOAP API, you can use the contains and containsAll methods to query whether one or more recipients are on an unsubscriber list.

Can I configure an unsubscribe list so that it only applies to one recipient list?

Yes. You have the option of setting up an unsubscribe list based on a recipient list. Whether or not it makes sense to do so depends on the recipient list you are using and how a client is structured. Contact our customer support for assistance.

Can I use the Episerver Campaign user interface to place a recipient on the unsubscribe list or remove him/her from it?

No. Only the recipient can complete the unsubscribe process. To rescind an unsubscription, the recipient must re-register him/herself (by using the opt-in option, depending on the configuration).

Can I unsubscribe a recipient by deleting him/her from the recipient list?

If you delete a recipient from the recipient list, the recipient will no longer receive any mailings via this list. If the recipient appears in multiple lists, however, he/she will continue to receive mailings via the lists from which he/she was not deleted.

This method is not recommended, because the recipient's de-registration is not recorded and the recipient can, therefore, be added to a recipient list again – when recipients are imported, for instance. This can result in a complaint if the recipient continues to receive mailings after having unsubscribed.

I manage my recipient list myself and import it into Episerver Campaign prior to each mailing. What should I keep in mind when doing this?

If you manage your recipient list yourself – including unsubscribers – and import it prior to each mailing, then the unsubscribe list at Episerver Campaign will have no impact. In this case, you should make sure that only recipients and not unsubscribers are on your list.

You also have the option of using specially designed jobs/services to import unsubscriber lists or multiple lists. These jobs/services are not accessible via the Episerver Campaign user interface. The

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desired lists are transferred onto the Episerver Campaign server per SFTP and automatically imported to the client:

- Importing an unsubscribe list: Using this feature, you can import your local unsubscribe list to the unsubscribe list on your Episerver Campaign client.
- Importing recipients including unsubscribers: Using this feature, you can import an individual recipient list that contains both active recipients for a variety of recipient lists as well as unsubscribers. The status of a recipient or the list which is being imported to must be entered in a separate column in the recipient list. This helps you keep your lists consistent.

Contact customer support for configuration of jobs/services. Data being imported must have a defined name and be stored in a defined directory per SFTP.

Recipient lists

If you need a new recipient list with a different structure (different data fields) as in the existing lists, contact our customer support.

The **Recipient list** menu provides functions to edit, empty or copy existing recipient lists. In the overview area, you find all existing recipient lists for your client and the number of recipients in each list.

➜ First click the list you want to edit and then click one of the three buttons below:

- Copy
- Edit
- Clear

Copy

This option creates a new recipient list which contains the same data fields as the selected source list. Only the list structure will be copied, but not the list entries.

Edit

With this option you can change the name or description of the selected list. You can also set any recipient list as a test list. Test lists can only be used for sending test emails, not for regular sending.

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Clear

This option deletes all entries from a recipient list. The list itself will not be deleted and can be used again.

If you want to delete and/or unsubscribe multiple recipients from multiple recipient lists, use the Cleanup function.

Data fields

Every recipient list contains an unlimited number of data fields. One data field is reserved for the recipient IDs – usually the email address. The field that contains the recipient IDs cannot be edited. Instead of the email address, you can use any other ID, e. g. a customer ID.

Data types

Every data field can only store a certain data type. The data type will be chosen when the recipient list is created. According to the data type, you can perform mathematical and/or logical operations with the value of a data field, for example:

- Compare the value of a field with a given value (equals/is less than/is greater than). These operations can be performed with all number fields. Numbers can be integers (32-bit/64-bit) or floating decimals.
- Compare date and time (is older than/is younger than/is prior a given time/date/is past a given time/date/is exactly ... old). These operations can be performed with date fields.
- is true/is false operations can be performed with boolean fields.
- Congruence or incongruity of strings and characters (begins with/end with/does not begin with/does not end with/contains/does not contain). These operations can be performed with string fields.

The following data types and range of values are permitted for recipient list data fields:

Data type	Range	Example		
Boolean	true/false	Registration via website, interested in promotional news-letters		
Date	date	Registration date Supported date formats:		
		Date format	**Description**	**Example**

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Data type	Range	Example		
		yyyy-MM-dd	Date with separator	2017-05-07
		yyyy-MM-dd HH:mm:ss	Date and time	2017-05-23 09:50:04
		yyyy-MM-dd'T'HH:mm:ss	Date and time according to ISO 8601	2017-05-23T09:50:04
		yyyy-MM-dd'T'HH:mm:ss,SSS	Date and time with milliseconds	2017-05-24T08:03:59,123
		yyyy-MM-dd'T'HH:mm:ssXXX	Date and time with time zone offset	2017-05-07T12:18:54+02:00 2017-05-07T08:18:54-02:00
Float	single-precision 32-bit IEEE 754 floating point	Conversion volume, customer score		
Integer	32-bit-signed; -2,147,483,648 - 2,147,483,647	Age		
Long	64-bit-signed; -9,223,372,036,854,775,808 - 9,223,372,036,854,775,807	Customer ID		
String	unicode text up to 256 characters	Email address, first name, last name, city, postal code		
Text	up to 64,000 characters	Email address, first name, last name, city, postal code		

Cleanup

If you want to automatically delete and/or unsubscribe multiple recipients from multiple recipient lists, use the Cleanup function. Using this function, you simply upload a CSV file with the recipients you want to delete or unsubscribe and then select the recipient lists.

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To delete and/or unsubscribe recipients, you must have the appropriate rights. If you do not have these rights, deletion and/or unsubscription of recipients is impossible.

To use this feature, perform the following steps:

1. Create a CSV file containing the email addresses of the recipients you want to delete or unsubscribe.
2. Open the start menu and under **Recipients**, click **Cleanup**.

✔ The **Cleanup recipients** window opens.

3. In the **Upload file** tab, click Browse... .
4. Select the previously created CSV file (containing the email addresses) and click Preview .

✔ The file is uploaded to the Episerver server.

Depending on the file size, the upload may take a few minutes. The **Preview** tab shows you the uploaded recipients. The **Recipient** column must contain the email addresses. On import, only this column in the CSV file is considered.

5. If the columns are not displayed correctly, change the separators and escape characters.
6. Change the **Character encoding** option only if the email addresses are not displayed correctly.
7. If the first line of the CSV file contains column names, in the **Skip first row** list, select **Yes**.
8. Click Refresh preview to check your settings.
9. Click Delete options .
10. In the **Delete recipients** area, select the **Delete decipients** check box and, in the **Recipient lists** area, select one or more recipient lists from which you want to delete the recipients. If you only want to unsubscribe the recipients, skip this step.
11. Click Unsubscribe options .
12. In the **Unsubscribe recipients** area, select the **Unsubscribe recipients from all recipient lists** check box to unsubscribe the recipients from all recipient lists. If you only want to delete the recipients, skip this step.
13. Click Summary .

✔ In the **Summary** tab, all actions to be performed are displayed.

14. If you want to make changes, click the corresponding tab and perform the appropriate steps.

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15. Click Finished.

The recipients are deleted and/or unsubscribed according to your settings. You can continue to work normally and will receive a notification email to your email address once the process is complete.

As long as a process is not completed, you cannot run a new one.

The required file format for importing recipient data into Episerver Campaign is called CSV (comma-separated values). This is an international standard format for data exchange employed by almost every database system, as well as by Microsoft Excel. Generally speaking, the file is a text file in which each record is stored on a single line. The individual fields of the record (in this case: email addresses) are separated by a comma (or semicolon), hence the name of the format. You may need to export the data from your recipient database, CRM application or the like. If you have any questions concerning this export, ask your IT department. If the source file is not a CSV file or if you want to export the recipient data from your local data base or CRM first, ask your IT department for assistance. If the source file is a spreadsheet file, you can easily convert it into a CSV file. Open the file with your spreadsheet application (e.g. Microsoft Excel), select **Save as** -> **.csv file** and save it to your local hard drive.

Target groups

Target groups are subsets of your recipients defined by specific rules and conditions. With Episerver Campaign, you can easily define target groups. Each target group may contain several rules and conditions and a logic relation between them. Use target groups to send out a mailing to a pre-defined group of your recipients (e.g., all recipients in the US) or to create dynamic content and subject lines. Dynamic paragraphs allow you, for example, to show different items to male and female recipients. Dynamic subject lines can be used to create specific attention even before a recipient has opened the mailing. There are different classes of conditions that can be used to define a target group:

- **Action-based conditions** are criteria based on an action or event (e.g., click, open) a recipient has done. Those conditions are only applicable after a mailing has been sent. An example for an action is: Recipient has received a specific mailing and has clicked on a specific link in this mailing.
- **Campaign-based conditions** check whether recipients are currently passing through or have already passed through one or more specific Marketing Automation campaigns.
- **Recipient list-based conditions** check whether recipients are contained in specific recipient lists.

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- **Recipient data-based conditions** are criteria based on any field of the recipient list (e.g., "City" or "Interest").
- **Target group-based conditions** check whether recipients are contained in another target group.

If your client has been configured for post click tracking, actions that have been made on your website (e.g., online shop) can be tracked. For example, select all recipients who have bought a certain product from your shop or have spent a certain amount in your shop. To configure a target group with post clicks, select **Actions** from the first drop-down menu and then **has created post click**.

Example: Define a target group that contains all male recipients in the US. You may now vary this target group by adding further rules, e.g., recipients who clicked on a specific link in the last mailing they received. Use this target group to send a special offer or a promotional email to all selected recipients. If you apply the target group to the whole mailing, only the target group will receive the mailing. If you apply it to a paragraph, the content will only be shown to these recipients, while the others receive the regular mailing.

If you want to see the matches of a target group in the recipients overview and the selected target group contains user-based data (e.g., user actions), you get an error after clicking `Apply`. Due to data privacy reasons, it is not allowed to analyse the user data of a single user. When using this target group to send a mailing or to create dynamic content, it will work properly, though.

Target groups overview

To manage target groups, open the start menu and, under **Recipients**, click **Target groups**. In a list, all existing target groups are displayed. If you click a target group from the list, the target group definition is shown in the bottom area of the window. Every target group definition is made up of one or more rules. One rule can be, for example, `The email address contains "@example.com"` or `The first name is "Mark"`.

You can organize your target groups in folders. See Folders to learn how to create and use folders and how to draw items into a folder.

Use the buttons below the list to perform the following actions for the target group:

- Create
- Copy
- Edit
- Analysis

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Create

1. Click Create.
✔ The **Create target group** window opens.
2. In the **Client** drop-down list, select the client you want to create a target group for.
3. In the **Target group definition** area, define the rules and conditions for the target group by clicking + and performing the steps as described in Target group analysis.
4. Optionally, you can now execute a target group analysis. For more information, see Analysis.
5. Click Properties.
6. Enter a name and an optional description for the new target group.
7. Click Create.

Copy

1. Select an existing target group you want to copy and click Copy.
✔ The **Copy target group** window opens.
2. In the **Client** drop-down list, select the client you want to copy the target group to.
3. In the **Target group definition** area, you may define the rules and conditions for the target group by clicking + and performing the steps as described in Target group analysis.
4. Optionally, you can now execute a target group analysis. For more information, see Analysis.
5. Click Properties.
6. Enter a name and an optional description for the new target group.
7. Click Create copy.

Recipient field does not exist in target client

If the target group you want to copy contains a recipient field based on a rule that uses a recipient field which does not exist in the recipient lists of the target client, the respective name of the field is shown like this: `???Name???`. You can still copy the target group. After that, switch to the target client and select the copied target group. Change the field name by selecting a field from the drop-down list and save the target group.

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Edit

1. Select an existing target group you want to edit and click Edit.
✔ The **Edit target group** window opens.
2. In the **Target group definition** area, you may edit the rules and conditions or add new ones for the target group. To edit a rule, click it and perform the steps as described in Target group definition.
3. Optionally, you can now execute a target group analysis. For more information, see Analysis.
4. Click Properties.
5. You can change the name or description of the target group, or add and edit rules and conditions.
6. Click Save.

Analysis

The target group analysis gives you the opportunity to check your target group for correct functionality. So you can already evaluate and check how many recipients of one or more recipient lists the target group definition matches and change the definition if necessary before even sending the mailing. For more information, see Target group analysis.

Target group analysis

The target group analysis gives you the opportunity to check your target group for correct functionality. So you can already evaluate and check how many recipients of one or more recipient lists the target group definition matches and change the definition, if necessary, before even sending the mailing.

To perform a target group analysis, perform the following steps:

1. Open the start menu and, under **Recipients**, click **Target groups**.
✔ The **Target groups** window opens.
2. Select a target group and click Analysis.
✔ The **Edit target group** window opens. In the upper area, you can see the target group definition.
3. In the **Analysis** area, in the **Recipient list** drop-down list, select one or more recipient lists for which you want to perform the target group analysis.

Ensure that all selected recipient lists have at least one media type in common. If several lists with more than one media type in common have been selected, then you are asked to select which media type represents the delivery method. For example, if you would like to send emails, then select the media type **Email**.

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4. If you use a default target group but do not want this to be included in the calculation, disable the default target group. To do this, select the box next to **Disable default target group for this calculation**.

5. Click Calculate.

✔ The calculation is started in the background. If the analysis is completely calculated, the graphical analysis is displayed.

The analysis contains the following information:

- **Recipients**: Displays all recipients of the selected recipients list(s) that match the target group. The recipients are sorted by the following categories:
- **ready**: All recipients that match the target group and that are ready for dispatch. Mailings can be sent to these recipients without any problems.
- **bounced**: All recipients that match the target group but that are not ready for dispatch, because they have created too many bounces.
- **blacklisted**: All recipients that match the target group but that are not ready for dispatch, because they are blacklisted.
- **unsubscribed**: All recipients that match the target group but that are not ready for dispatch, because they are unsubscribed.
- **Recipient lists (ready)**: Displays the number of recipients of the corresponding recipient lists that match the target group. Only the number of recipients mailings can actually be sent to is displayed here. Recipients who created too many bounces, are blacklisted, or unsubscribed are not taken into account.

6. If you want to change the target group, for example because it does not match the desired number of recipients, proceed as described in the Edit section and then perform the analysis again.

7. If the "Example recipients" feature is enabled in your client, after the analytical calculation, you can display sample recipients (up to 100 datasets) that meet the target group definition. To do so, click Example recipients.

✔ A window with up to 100 sample recipients opens.

To enable the "Example recipients" feature, you need the consent of your recipients to view and use personal data. If you have this consent, complete a declaration of release for the use of personal tracking data, sign it and send it to customer support. This form is available from customer support.

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Recipients in several lists and list order

If a recipient is contained in several recipient lists, the recipient is counted only once. The order of the recipient lists is crucial for the final result, too.

Example:

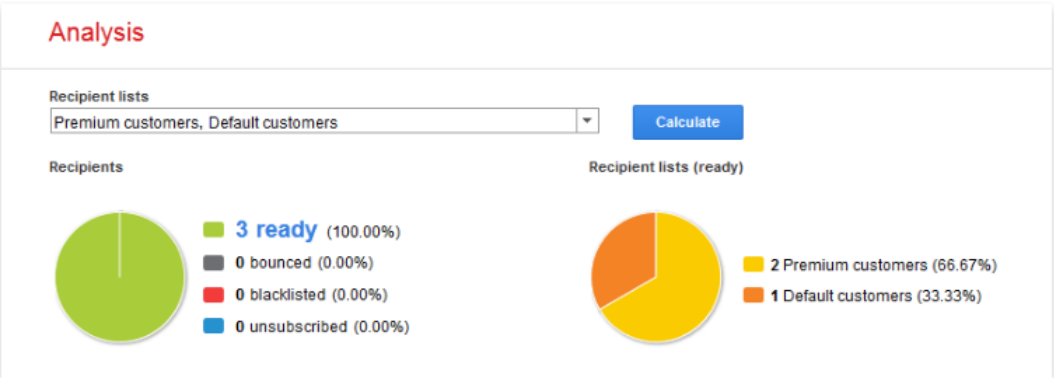
- Recipient list "Premium customers" with a total of four recipients: Peter Schmidt, Maik Müller, Jana Friedrich, Susi Sauer
- Recipient list "Default customers" with a total of four recipients: Peter Schmidt, Maik Müller, Manuela Zitter, Susi Sauer

Perform the following steps:

→ 1. Create a target group "Women", which matches all women in the recipient lists.

→ 2. First, select the recipient list "Premium customers" and then the recipient list "Default customers".

✔ On the left, the analysis shows that mailings can be sent to only three recipients, as the recipient Susi Sauer is contained in both recipient lists. On the right, two recipients of the recipient list Premium customers and one recipient of the recipient list Default customers match the target group:



→ 3. Now swap the order of the two recipient lists and perform the analysis again.

✔ Now, two recipients of the recipient list "Premium customers" and one recipient of the recipient list "Default customers" match the target group:

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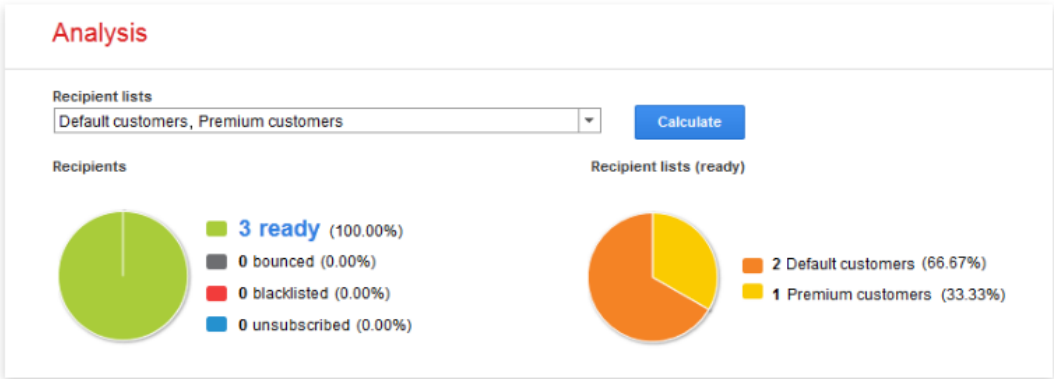
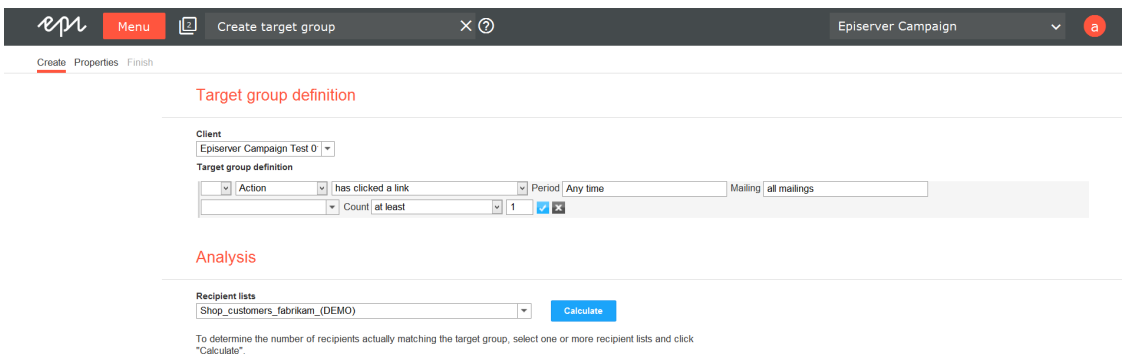


Evaluation of your recipient lists

Additionally, you can use the target group analysis to evaluate your recipient lists:

So you can, for example, quickly get the number of women contained in your recipient list. To do so, just create the target group definition **The value of the field "Salutation" equals "Mrs."** and perform a target group analysis for a recipient list. However, perform such evaluations only on single recipient lists because recipients that are contained on multiple recipient lists are only counted once (as described above)

Target group definition



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When creating a new target group, the **Target group definition** area is empty, except for a + symbol. Click it and, in the very left drop-down list, select whether you want to create a negative condition (e.g., is not, contains not, has not). Note that a negative condition matches when the criteria you define for it is false. Usually, rules and conditions are defined positively, i.e., they must be true to get a match. To create a positive condition, leave this first drop-down field empty.

In some cases, it may make sense to formulate rules in a negative fashion. To do this, select the **NOT** option from the first drop-down list while creating a rule. To, for example, find all recipients not from Berlin, the rule would be: `NOT Recipient list field "Location" equals "Berlin".`

In the next drop-down list, select whether you want to create an **action-based**, **campaign-based**, **recipient list-based**, **recipient data-based** or **target group-based** condition. As another option, you can choose the parentheses. Parentheses group rules hierarchically to handle them with priority, like in a mathematical equation. Rules within the parentheses are applied first and then the rules in the second level and so on. Parentheses are especially useful if a complex target group is planned and different logic terms (And, OR) will be used.

Between two conditions, either the logic relation AND or OR can be used. To change the type of relation, just click it. Due to correctness and logical unambiguousness, target groups without parentheses can only contain one type of logic relation. Thus, if you click a relation, all relations between the rules are changed. If you want to use different types of logic relations, use parentheses (see following example).

Example

You are looking for recipients located in Berlin or Hamburg and with email accounts at example.com. If you set up these conditions, you will find that you can either use AND or OR between the three rules. To use different logic relations, set parentheses as follows:

```
(Recipient location equals Berlin OR Recipient location equals Hamburg)
AND email address contains @example.com
```

The parentheses make Episerver Campaign select recipients from Hamburg or Berlin first. Then out of this subset, recipients with an example.com email account are selected.

Use the drag and drop function to sort rules and conditions or put them into parentheses. Move the cursor over a rule and drag it to the desired position.

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If you move the cursor over a rule, a context menu appears on the right side. To add a new condition at a specific position, click + . Click — to delete a condition. The **Copy** symbol creates a copy of a condition.

Recipient data-based conditions

If you selected **Recipient list field** in the second drop-down list, the following drop-down list shows all fields from your recipient list. Select the field you want to query, e.g., "ZIP code". Depending on the type of the chosen field, in the next step you can select an operator. The following table shows all available operators. Complete the rule by entering a matching value in the last field (if necessary).

Operator	Data field type	Matching value necessary
`equals`	string, numeric field, date field, boolean	✓
`does not equal`	string, numeric field, date field, boolean	✓
`is greater than`	numeric field	✓
`is greater than or equals`	numeric field	✓
`is less than`	numeric field	✓
`is less than or equals`	numeric field	✓
`is one of the following values`	string, numeric field, date field	✓ See also the Multiple values section.

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Operator	Data field type	Matching value necessary
contains	string	✓
starts with	string	✓
ends with	string	✓
is empty	string, numeric field, date field, boolean	✘ See also Empty fields (NULL values) at the end of this page.
is not empty	string, numeric field, date field, boolean	✘ See also Empty fields (NULL values) at the end of this page.
in exactly X hours	date field	✓
in exactly X days	date field	✓
is anniversary	date field	✘ This operator compares the day and month of the date field entry with the current day and month. Thus, recurring events such as birthdays and anniversaries can be filtered.
is anniversary in exactly X days	date field	✓
dates back exactly X days	date field	✓
dates back less than X days	date field	✓
dates back more than X days	date field	✓

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Operator	Data field type	Matching value necessary
`dates back less than X months`	date field	✓
`dates back more than X months`	date field	✓
`month is current month`	date field	✘ This operator compares only the month of the date field entry with the current month.
`day is current day`	date field	✘ This operator compares only the day of the date field entry with the current day. Be aware: This does not mean **today** because all dates, which have the same day, will match.

Action-based conditions

If you selected **Action** in the second drop-down list, the rule can be defined through recipient-specific actions or events (e.g. opens, clicks).

The following actions are available:

- `has caused hard bounce`[1]
- `has caused soft bounce`[1]
- `has clicked link`
- `has clicked click profile at least x times`
- `has received mailing`[1,2]
- `has opened mailing`
- `has replied`
- `has created one or more post clicks`

Refer to the "Post click conditions" section.

[1] Note that the action **has received mailing** means that a mailing has been sent out to a recipient, i.e., the subscriber is not unsubscribed, blacklisted or outbounced. A recipient who matches this criterion can still create a hard or soft bounce. To exclude

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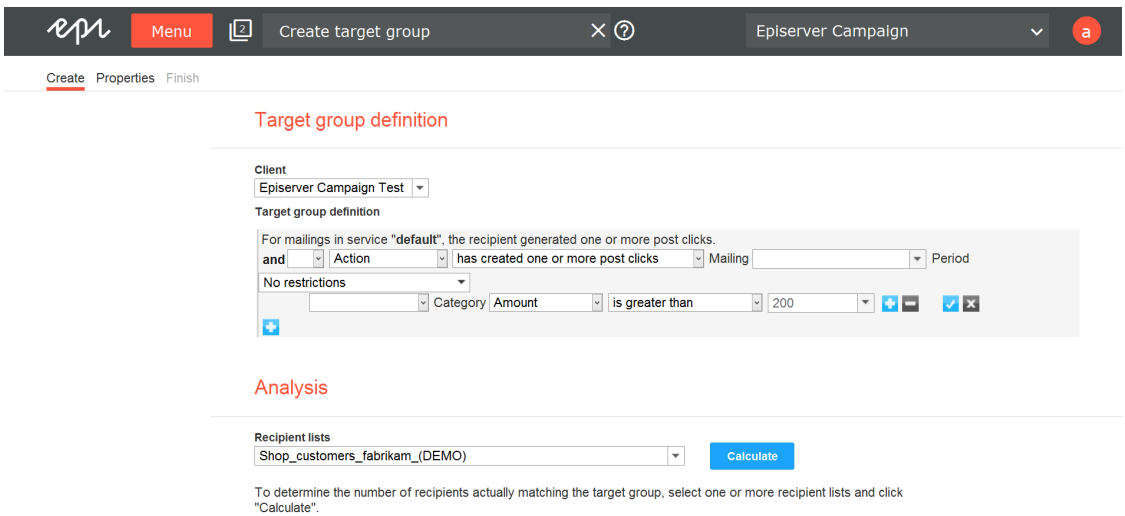
these recipients, create the target group as follows: `has received mailing AND has NOT created soft/hard bounce`.

[2] If a master mailing with one or more split mailings is selected here, this filter matches the recipients of the master mailing plus the recipients of all associated split mailings. If a split mailing is selected, only recipients of this split will match. Be aware that this behavior will lead to unusable results if a master mailing and an associated split mailing are combined in a filter rule, since recipients would be counted twice. To create a filter which matches only the recipients of the master mailing, create the target group as follows: `has received master mailing AND has NOT received split mailings 1,2,....`

Post click conditions



If post click tracking has been configured for your client, actions are tracked which a recipient does on your website. You can create target groups using these post click data, for example, select all recipients who have bought a certain item in your online shop.

Post click data can be tracked using the proprietary Episerver Campaign post click tracking (your website needs just a tiny modification to allow that) or a full-featured web analytics software. For this purpose, Episerver maintains partnerships with several vendors, e.g., Adobe, Webtrekk, Econda,

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Google Analytics and eTracker. If you are interested in this option, contact your Episerver account manager.

To create a target group with post click data, perform the following steps:

1. In the second drop-down list, select **Action** and in the following drop-down list, select **has created one or more post clicks**.

✔ The input mask changes according to the post click setup of your client.

2. If you use more than one post click or web analytics services, select the one you would like to use from the **Service** drop-down list.

The internal Episerver Campaign post click tracking is called **default**. If you use only one service, this drop-down list will not appear when creating the target group. The service will be displayed, though when you save the target group condition.

3. In the **Mailing** list, you can select post clicks that have been created through a designated mailing. If you leave this selection empty, any mailing or no mailing at all, respectively, will be taken into account.

Post click data that have not been created through a mailing can only be processed, if they carry a user ID identical to the recipient ID within Episerver Campaign. Thus, the ID your customers use when logging in to your online shop should be the same as the recipient ID used in Episerver Campaign. Usually, the email address is used as recipient ID. New customers and customers, which don't wish to receive promotional emails (e.g., your newsletter), too, can receive system emails (e.g., order confirmations) via Episerver Campaign. If customers register for your newsletter, their post click data is completely available.

4. To delimit post clicks to a period or date, select a type in the Period field and enter a date or a number of days in the calendar interface. The following scenarios are available:
   - **No restrictions**: Post clicks are not delimited by time.
   - **From ... until ...**: Post clicks must have been created in the designated period. Set the initial and final date using the calendar interface.
   - **On ...**: Post clicks must have been created on a designated date. Select the date using the calendar interface.
   - **Not on ...**: This scenario excludes the selected date. Select the date using the calendar interface.

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- **After or on ...**: Post clicks must have been created on the selected date or later. Select the date using the calendar interface.
- **Before or on ...**: Post clicks must have been created on the selected date or earlier. Select the date using the calendar interface.
- **Older than ... days**: Post clicks must have been created X days ago or earlier. Enter the number of days in the input field. In regular mailings, the time range is calculated from the sending date. In system mailings, the time range is actualized every day.
- **Exactly ... days ago**: Post clicks must have been created exactly X days ago. Enter the number of days in the input field. In regular mailings, the date is calculated from the sending date. In system mailings, the date is actualized every day.
- **Within the last ... days**: Post clicks must have been created within the last X days. Enter the number of days in the input field.
- **Within the last ... months**: Post clicks must have been created within the last X months. Enter the number of months in the input field.
- **Today**: Post clicks must have been created on the current day. In regular mailings, this day is the sending date. In system mailings, an actualization is made every day.
- **Current month**: Post clicks must have been created in the current month. In regular mailings, this is month in which the mailing is sent. In system mailings, an actualization is made every day.

5. Select a category.

Categories can be defined individually and contain a string (e.g., product name) or a float value (e.g., revenue). You can combine several categories in one target group condition and thus, for instance, select recipients who have bought product A and B or have bought products from group X for more than 500 dollars, etc. By combining several post click categories you may easily create recipient segments for discounts, cross- and up-selling offers, etc.

6. If the selected category is a string, you can select one of the following operators from the list:
   - **equals**
   - **does not equal**
   - **contains**
   - **is empty**
   - **is not empty**
   - **starts with**
   - **ends with**
7. In the field next to the operator, enter the identifier. The automatic completion function helps you to exactly match the name you are looking for. By default, the automatic completion shows

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the first ten matches. If there are no more than 10 values, the complete list is shown in a drop-down list. In this case, simply select an item.

8. If the selected category is a float value (e.g., a product price), you can select one of the following operators from the drop-down list:
   - **equals**
   - **does not equal**
   - **is greater than**
   - **is less than**
   - **is less than or equals**
   - **is greater than or equals**
9. In the field next to the operator, enter a value. Be careful when the selected operator is **equals**. In this case, the entered value must match exactly the value given by the system, including decimal places. Follow the instructions for entering multiple values.
10. Click **OK**.

Recipient list-based conditions

If you selected **Recipient list** in the second drop-down list, the system checks whether recipients are contained in a recipient list. Perform the following steps:

1. In the **Recipient list**, click a recipient list.
2. Click **OK** to add the condition to your target group.

> Note that Episerver Campaign identifies recipients by recipient ID, usually the email address. If you are using custom recipient IDs (i.e., no email addresses), you have to select recipient lists that use the same custom recipient IDs.

Campaign-based conditions

If you selected **MA campaign** in the second drop-down list, the system checks whether recipients are currently passing through or have already passed through a specific Marketing Automation campaign. You can select multiple campaigns for this condition as well:

1. In the drop-down list, select one of the two options **has passed through MA campaign X** or **is currently passing through MA campaign X**.
2. In the following drop-down list, select one or more campaigns.
3. Click **OK** to add the condition to your target group.

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Target group-based conditions

If you selected **Target group** in the second drop-down list, the system checks whether recipients are contained in a target group. Perform the following steps:

1. In the drop-down list, select **Recipient matches target group X**.
2. In the following drop-down list, select the desired target group.
3. Click **OK** to add the condition to your target group.

Use this condition to add target groups, which are used many times (e.g., "Men", "Women", ...) as a component to other, more complex target groups. Thus, you only have to define these component target groups once and can reuse them whenever and wherever they are needed.

When defining target groups with a target group-condition, take care that they do not exclude each other reciprocally, for instance: The target group you want to create matches all recipients from the Greater London area. To do so, you define a condition that matches the respective postal codes. If you add a target group-based condition to this target group matching all recipients from Northern England, these two conditions would exclude each other reciprocally and there would be no matching recipients in this target group.

Multiple values

If you select the operator **is one of the following values**, you can enter multiple values in one text box. For example, if you want to copy values from a CSV file:

1. Select the operator **is one of the following values**.
2. Enter the values, for example, comma-separated.
3. Open the drop-down list, click the gear symbol (**Separate multiple values**) and in the box, enter the used delimiter symbol.
4. Click **OK**.

✔ The entered values are now handled as single values.

Empty fields

Note one important point concerning the use of empty and unknown (NULL) fields. There are generally three types of fields.

- Fields which contain a value (e.g., Place of residence = "Berlin")
- Fields which contain no value and therefore are empty (Place of residence = "")
- Fields which are unknown (Place of residence = unknown)

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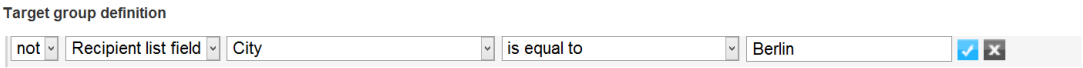
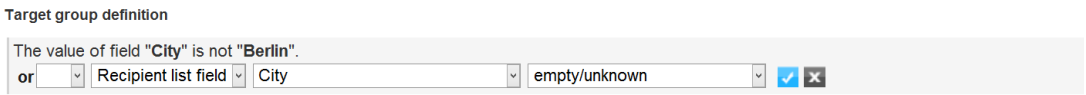
For example, if you acquired additional newsletter subscribers through an external action (e.g., sweepstakes) and imported these into your recipient list, it can sometimes occur that these, unlike the other recipient data sets in your recipient list, do not contain the information for "Place of residence". This means the "Place of residence" field for this recipient in your recipient list is presently unknown,

If you now want to, for example, select all recipients in your target group who do not live in Berlin, the condition would be as follows:



With this, all recipients are selected who have entered a place of residence other than Berlin (e.g., Cologne), but not those recipients who have entered no place of residence (the recipient list field is NULL, i.e., unknown). The rule does not consider these because the Episerver Campaign logic assumes that it cannot be determined whether the recipient resides in Berlin or not, if the place of residence is unknown.

However, with another rule, you can modify the target group so that all recipients whose places of residence are unknown are also selected.To do this, add the rule `Recipient list field "Place of residence" is empty/unknown` and link both rules with **OR**:



Thus, you include all recipients without an explicit place of residence by using the query **is empty/unknown**.

Opt-in

The opt-in method forms the basis for operating legally compliant email and omnichannel marketing campaigns. An opt-in method requires recipients to give a sender explicit permission to send them advertising mails. For this, the recipient:

- actively agrees to receiving advertising emails by, for example, ticking a box, or
- separately states that this acceptance relates solely to the receipt of advertising emails, or
- agrees to a declaration that clearly defines the scope (Who is the advertiser? What is being advertised? How often?).

This documentation provides you with detailed information about the opt-in procedure and the double opt-in, which we recommend to ensure you have evidence that permission was given.

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The opt-in method

The following information is not legally binding.

Legal basis

In accordance with paragraph 7, section 2 UWG (the German Unfair Competition Act), sending advertising emails to consumers without their prior express consent to receive such email is considered to be an unreasonable nuisance. If an advertiser contacts a consumer without consent, then this is considered unfair competition.

To protect consumers from receiving unwanted email (spam), legally compliant email and omnichannel marketing is based upon permissions. The sender requires the end consumer's consent to receive emails (e.g., newsletters).

If a recipient has given their permission via an opt-in method, then the sender has valid proof of consent in the event of a complaint by the recipient.

Should legal action arise, the opt-in must be demonstrable in a court of law. Precise version management of the opt-in processes is advisable for use in practice.

Exceptions

Transactional mails do not generally require an opt-in. For example, registration and order confirmation emails may be sent without an opt-in. However, such transactional emails must not contain any additional advertising.

Omnichannel marketing: Separate opt-ins

In accordance with mandatory documentation requirements of data protection legislation, ensure that you collect and record a separate opt-in for each advertising medium (telephone, text message, email, etc.).

The opt-in text must exclusively see consent for sending promotional material and – as opposed to generic "general consent" for all types of advertising – the text must precisely describe the promotional materials. For example, you should differentiate between a regular newsletter and a reminder message that is sent when a customer does not respond to an offer.

Validity of the permission

An opt-in may expire as established by current case law. This will generally be the case if you do not contact a recipient for over one year. The previously given consent will no longer apply if you begin contacting the recipient again after this period.

To prevent opt-ins from expiring, it is recommended that you regularly contact your recipients.

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Possible opt-in methods

The following is a list of all possible opt-in methods

Double opt-in method

Episerver recommends the use of this opt-in method.

The double opt-in method is a procedure in which the end user consents to receiving emails from the sender before any promotional emails are sent. Recipients receive an email with a double opt-in link which they have to click to confirm their newsletter registration.

Their addresses are only added to the recipient list after they click on the link. This method is intended to ensure that end users are not signed up for services against their will by third parties. This not only aggravates the end users but they also have to tediously unsubscribe from the services.

Single opt-in method

Episerver does not recommend the use of this opt-in method.

Using the single opt-in method, an end user agrees to receive emails from the sender. Their email address is then entered into the recipient list. Unlike the double opt-in method, confirmation links are not sent. From a legal standpoint, the single opt-in method is not recommended since it cannot be assumed that recipients have entered their email addresses into the recipient list themselves.

Confirmed opt-in method

Episerver does not recommend the use of this opt-in method.

In the confirmed opt-in, an end user agrees to receive emails from the sender. The recipient then receives an email confirming that their data has been recorded and that they will receive newsletters by email. This method suffers the same problems as the single opt-in method, except that the recipients are now directly informed about the fact that their data has been entered into a recipient list.

Implementing the double opt-in method with Episerver Campaign

Setup

If you would like to use the double opt-in method, contact our customer support team. Our staff will set up the opt-in process and create the respective confirmation-mailing which contains information about

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the subscription. You can adapt this mailing as you like and it must include the so-called **double opt-in link** (using the field function `{Double-Opt-In-Link}`). This link refers to the confirmation page which is either provided by us or hosted by you.

Adapting your website

In the next step, we update your website so that the opt-in process we have set up is initiated as soon as a new recipient subscribes to the newsletter using the form. We can set up the connection using the add2 or addAll3 methods using the SOAP API or using the subscribe operation in the HTTP API (the opt-in process IDs required for this are available in the API overview).

Examples

1. Newsletter subscription
2. Confirmation email
3. Confirmation

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Thank you for your interest in our newsletter. Shortly you will receive an email including an activation link. Please confirm your subscription by clicking on the link in the email.

Return to Homepage

Your company

Product Company & Service Resources

Thank you for your interest in our mailings. Please confirm your subscription by clicking on the following link.

Click here to confirm your newsletter subscription

If you do not wish to receive the newsletter in the future, you will find a link to unsubscribe at the end of each email.

Reasons to use Episerver Campaign to manage double opt-ins

The reasons for managing the opt-in method and all associated data entirely from within Episerver Campaign speak for themselves.

- The entire process is managed from a single source,
- Almost the entire subscription process can be managed by a single system.

By comparison, managing the process using an external system requires recipient data to be synchronized and/or imported prior to every dispatch – which is a lot more work.

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Frequently asked questions about the double opt-in method

1. How do I explain the additional steps to new subscribers when they sign up for the newsletter?

Information

Once they have entered their information, clearly inform new subscribers that an additional step is required to activate the newsletter subscription ("We have added your email address to our list. To activate ... "). Explain why this step is necessary. e.g., "to prevent other people from subscribing using your email address" or "to validate your email address".

Link

Instruct your recipients to activate their subscription after entering their information. If possible, provide a link to their mailbox for activating the subscription. It is possible to use the domain parts of the email address to determine which email provider the recipient is using and to create a link to the specific service. Example: If the new subscriber has an xxxx@example.com address, then you can display a "Go to my email inbox" link that takes them to the login page at www.example.com.

When to send the confirmation email

You should send the confirmation email as soon as possible after the sign up so that it can be activated quickly. The recipient may otherwise forget the reason for the confirmation email or lose interest in the newsletter.

2. What should I be aware of when setting up the activation email?

Subject

Ensure that your activation email has a meaningful subject line that directly prompts the user to take action. e.g., "Please confirm your email address".

Sender

The sender name is often the first thing that a person sees and should therefore be easily recognizable. It is recommended that you use a consistent sender name for all emails, including the activation email. Give your potential subscriber an option to reply to the activation email (avoid using a noreply@...email address).

Presentation

The activation email should avoid using large blocks of text and complicated layouts. You recipient needs to click the confirmation link in the activation email. Help them to do this by providing concise and accurate instructions along with a clearly visible confirmation link.

Spam suspicion

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Inform new subscribers that emails from new and previously unknown senders may land in their spam/junk mail or unknown mail folders. If the recipient cannot find the confirmation email, they should check these folders.

3. What problems can arise when using the confirmation link in an activation email?

Short length

Make sure that the confirmation link is not too long. Otherwise there is a danger that it may get broken across two lines and no longer works. In case this happens, you should offer a solution to your subscribers, e.g., provide instructions such as "If the link does not work, copy both lines into the address bar of your browser." You should further ensure that the confirmation link stands out from the other text in the message, even where the email preview area is small.

Correct link

A further potential source of problems is a confirmation link that does not work. This can happen if the link contains a special character that causes Outlook or Thunderbird to incorrectly highlight it and thus send the user to a blank page. Another frequent cause of link problems is forgetting to properly use the HTML anchor tag. You should therefore always check that the confirmation link is correct.

4. How can I avoid any possible problems with the sign up process?

Address book entry

Tell new subscribers to add your email sender address to their personal address book or list of secure senders. You can say something like "To ensure that you receive our newsletter...". This will ideally be supplemented with a link to instructions for common email programs and webmail providers to help with this step. You can also provide a vCard that can be used with some email programs to quickly add your contact data to the address book with a single mouse click.

Help / contact options

Give the user options for providing feedback or getting in touch with you (email address, chat, freephone number, "not working" button) in case of any unforeseen problems with registration or confirmation. This can also turn out to be an important feedback channel for identifying problems or areas for improvement in the process. An even more elegant solution would be to provide contact information for a personal adviser or customer support representative if this would be appropriate or possible.

Resending

Provide the recipient the option of having the activation email resent in the event that it has not arrived within the first few minutes or the recipient is unable to find it.

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Subscription and unsubscribe forms

Are you interested in using forms by Episerver to deal with users subscribing to and unsubscribing from your newsletters? This document contains instructions on how to create these forms and tells you what information we need from you to help set them up. In the appendix, you will find model texts, error messages and sample forms that you can use for reference purposes.

To begin the process, we first need you to provide us with the information specified below. Our customer support is always available to provide assistance.

Types of forms

We can provide you with the following types of forms:

- Newsletter subscription forms
- Unsubscribe forms

What sort of data is required?

To subscribe to a newsletter, you normally will need to have at least a user's email address. Generally speaking, you will also want to request other information from a user, to address recipients in a more personalized fashion. When requesting information, you must distinguish between required and optional fields.

To be in compliance with legal provisions, you must also specifically identify any personal information that is required to make use of a service (only applies to email addresses) as well as any personal information collected with or without the user's knowledge. With respect to your subscription form, this means:

- The only required field is the recipient's email address.
- All other fields are optional (since they are not absolutely necessary to receive a newsletter) and the personal information collected in them is provided voluntarily. These may include a user's interests, age and place of residence (or zip code). The user can select from a list of interests by clicking check boxes. Age and zip code can be selected from a list. This information does not require the recipient's declaration of consent. If you want to make these required fields, we recommend you include a reference to the rules on data privacy protection.
- Personal information collected without the user's knowledge occurs through actions taken by the recipient (click data), e.g., by opening a newsletter, and requires the recipient's consent.

Be aware that each data-field in a form must have a corresponding field in the recipient list where this data is being imported.

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Hints on design and text

The design of form pages should be as simple and clear as possible. Ideally, the user should not need to use the scroll bar to reach the bottom of a page. This means that the fields used in a form, data protection notices and the **Send** button should be arranged in such a way that they display in the most commonly used screens and font sizes without needing to use the scroll bar.

If the form is to be integrated into your web page, e.g., your shop site, we will need to know the frame size (width in pixels). In this case, you will need to make sure that your website's HTML code allows scroll bars, otherwise the form may not display correctly.

HTML template

A good idea is to send us the pages needed as HTML templates. You will need a separate template for each page (e.g., subscribe page, unsubscribe page).

If you use this option, all texts (except error messages) must be included in the template in their final form. In addition, we will also need the error messages to be displayed whenever a field is not completed or filled out incorrectly.

If you want to provide the template as a graphic, send the text in a separate text file.

Error messages

Indicate which error messages should appear and where they should be displayed, e.g.,:

Error	Error message	Where to be displayed
No email address entered	`Please enter an email address.`	Next to email input field[1]
Consent not provided	`You must confirm that you wish to receive this newsletter.`	Next to check box[1]
Required field not completed	`Please complete all required fields.`	Next to the applicable field[1]

Confirmation texts

Specify the text to be displayed on the confirmation page (after registration has been successfully completed). We will also need a sample layout (see above).

Confirmation email

For subscriptions that use the confirmed or double opt-in process, you will need to send a confirmation email to the recipient. We will be happy to set up this email for you in your Episerver Campaign client so

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that it will be sent out automatically once a subscription has been submitted. You can manage the content of this email through our systems. You can change the texts at any time.

To set up a confirmation email, we require the following information:

- Type of email (text, HTML or multi-part)
- Name and email address of sender
- Subject
- Personalization (e.g. salutation)

How are user-provided data handled?

Recipient data is forwarded to a recipient list in Episerver Campaign. Only data for which corresponding field exists in the recipient list can be recorded.

You should first decide if you want to use an existing recipient list in your client. Which fields are available will be determined by the fields in those recipient lists.

If you need to set up a new recipient list, let customer support know what the name of the recipient list is and what fields it should contain. In general, the following apply:

Form field type	Recipient list field type
Free-form text	Text
Pop-up menu	Text (with set values)
Age, zip, etc.	Numerical
Check box	Boolean (possible values are true and false)
Option	Text, numerical or boolean

Examples

The following are sample texts and sample forms for your use. You may use the texts either as they appear or in modified form.

Data privacy notice on use of personal information provided voluntarily

```
Your personal information will only be stored if you provide it to us vol-
untarily, e.g., when registering, completing a survey or as part of a con-
tract. By providing this information to us, you are indicating your
consent to the storage, use and processing of this information. We will
not disclose your information to third parties without your consent. You
```

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may withdraw your consent to the storage and disclosure of your personal information at any time.

Data privacy notice on the use of data collected without the user's knowledge and stored in aggregate form

To personalize our newsletters and better address your specific interests, we analyze and store your clicks on links in our newsletters. We guarantee that the analysis and use of this information is carried out only in aggregate form and that under no circumstances will this information be transferred to third parties. By subscribing, you are indicating your consent to the collection of this information. You can cancel your subscription at any time. Your data will be deleted in its entirety upon cancellation.

Data privacy notice on the undisclosed collection of personal information

To personalize our newsletters and better address your specific interests, we analyze and store your clicks on links in our newsletters. We guarantee that the analysis and use of this information is carried out only in aggregate form and that under no circumstances will this information be transferred to third parties. By subscribing, you are indicating your consent to the collection of this information. You can cancel your subscription at any time. Your data will be deleted in its entirety upon cancellation.

Error messages

- Please enter an email address.
- Please enter a correct email address.
- Please complete all required fields.
- Please indicate that you accept the data privacy provisions and the terms of participation.

Confirmation page

- **Simple "Thank you" page**: Thank you for your subscription to our newsletter, which will be sent to example@example.com.
- **"Thank you" page (confirmed opt-In)**: We are delighted to periodically provide you with information about what's new at www.example.com. You will receive an email shortly confirming your subscription. You

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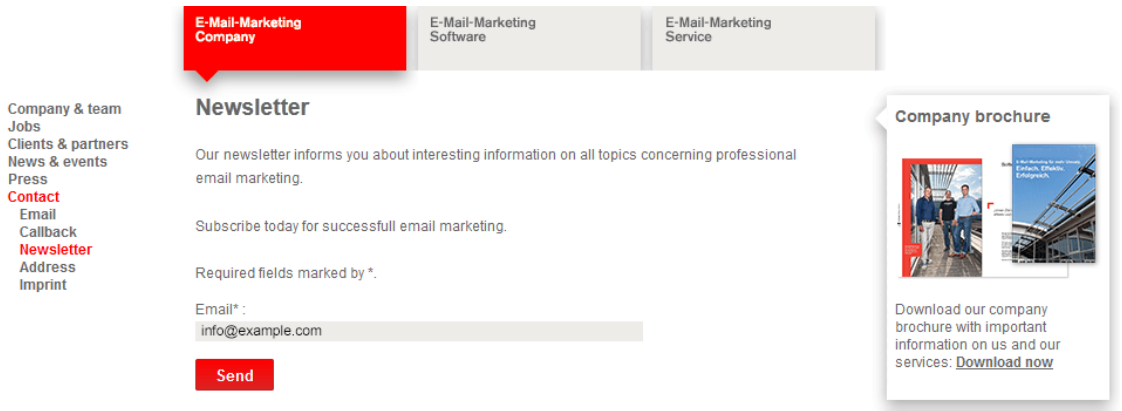
may of course cancel the newsletter at any time. You will find an unsubscribe link at the bottom of each newsletter.

- **"Thank you" page (double opt-In):** We are delighted to periodically provide you with information about what's new at www.example.com. You will receive an email shortly asking you to confirm your subscription. To confirm your subscription, please click the activation link contained in this email. You may of course cancel the newsletter at any time. You will find an unsubscribe link at the bottom of each newsletter.
- **Unsubscribe page**: You have been unsubscribed from our newsletter.

Sample form



[1] Error messages should appear as text directly above, alongside or below the applicable field in a form. Alternately, they may also appear at the top of a page, with a reference to the applicable field. However, it is best if error messages are placed as close as possible to the field they are referencing so that their meaning is clear to the user. The relevant field should always be highlighted in color. Specify the font size, color and other style elements (background color, frames, etc.) to be used in error messages, or provide us with a graphic template.

Send last mailing after double opt-in

This add-on sends the last regular newsletter to newly registered recipients after they have completed their double opt-in process, i.e., clicked on the **Confirm registration** link in the double opt-in email.

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

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Recipient history

Power tool for your customer communications: The recipient history gives you access to the entire timeline of Classic mailings and Smart Campaigns as well as to the marketing automation timeline for each individual recipient. This allows you to see at any time which email, which SMS, which push message or which fax you have sent and to whom it was sent.[1]

For example, if a recipient gets in touch with you to say that they haven't received a newsletter, you can quickly investigate the reason why. In the recipient history, enter the recipient's data to pull up an overview of their communications with a single mouse click. Using this information, you can check to see whether the recipient has perhaps inadvertently unsubscribed. You might see that the newsletter has been sent and you should ask the recipient to check in their spam folder for the newsletter.

You can even check to see if the recipient is currently in a wait node and will receive the expected newsletter later on in the day.

The recipient history is an efficient self service option that saves money: There is no need to call the Episerver customer support team with inquiries about message and marketing automation information for a particular recipient. The recipient history means you always have this data at hand.

A particular highlight of the recipient history: This feature allows you to find out how each individual recipient reacted to your communication with them: which messages they opened, and which links they clicked.

Set up recipient history

➜ To set up recipient history, contact customer support who will enable this feature.

✔ Once recipient history has been enabled for your user account, you will find it in the start menu under **Recipients**.

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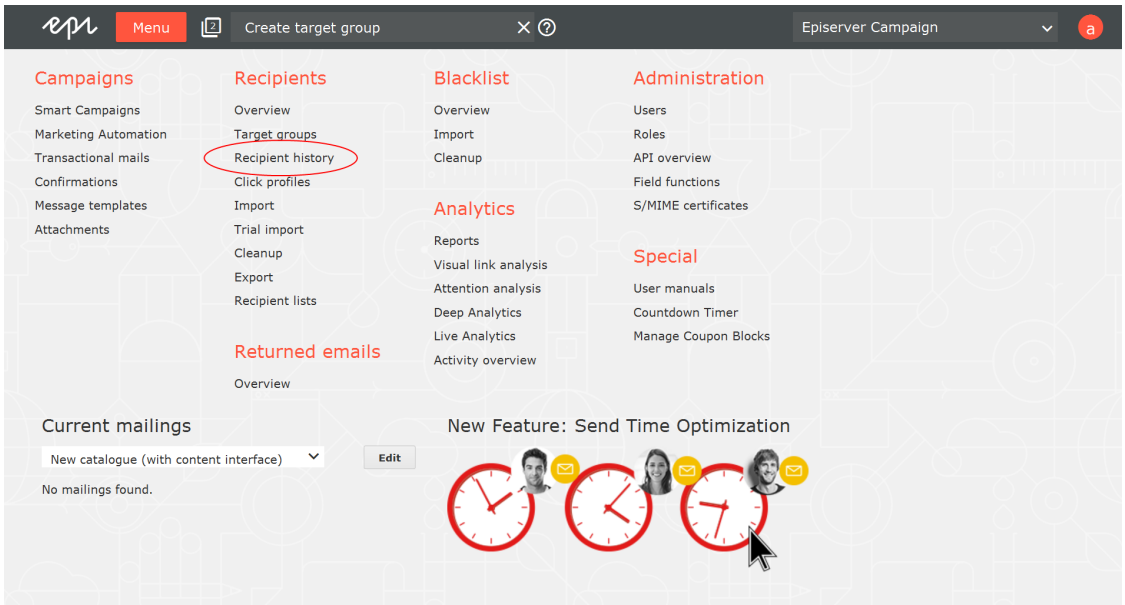

Use recipient history

Find out how to use the recipient history to view the message history (Mailings Classic and Smart Campaigns), the marketing automation history and the campaign analysis (Smart Campaigns) and view the opening and click behavior of your recipients.

Display message history

To display the message history for a recipient, perform the following steps:

→ 1. Open the start menu and under **Recipients**, click **Recipient history**.

✔ The **Recipient history** window opens.

→ 2. In the **Search recipient based on** drop-down list, select the type of information you want to use to find the message history for the recipient.

You can use the recipient ID, an email address, a mobile phone number, a fax number or a push token to find the message history for a recipient.

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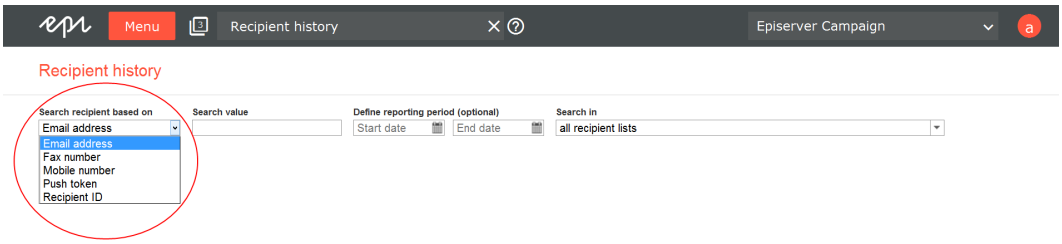
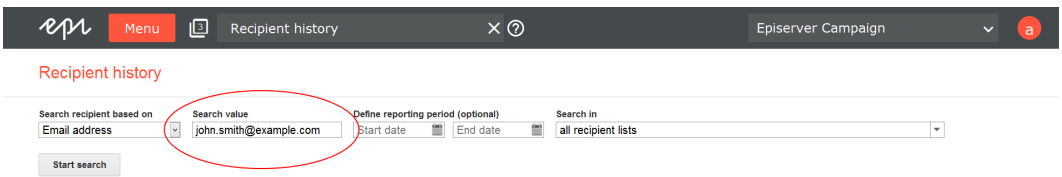


3. In the next field, enter the recipient ID, email address, mobile phone number fax number or push token to search for.



4. If desired, you can limit the time period for which the message history is displayed by entering start and end dates under **Define reporting period (optional)**. If you do not enter a start and end date, the entire message history for the recipient will be shown.

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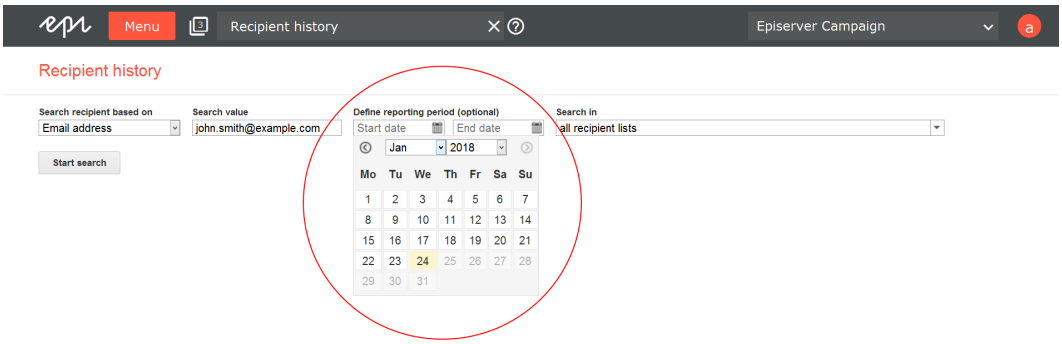
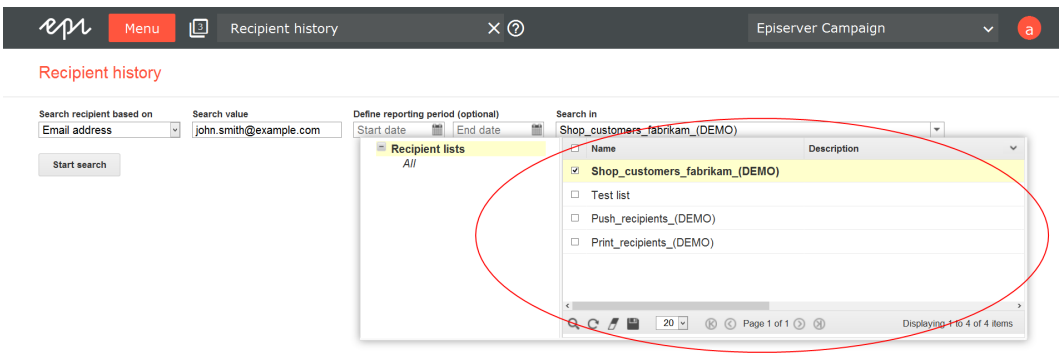


5. By default, all recipient lists within the entered data sets for your client will be searched. If you want to limit the search to specific recipient lists, use the **Search in** drop-down list and select the check box next to each recipient list you wish to search.



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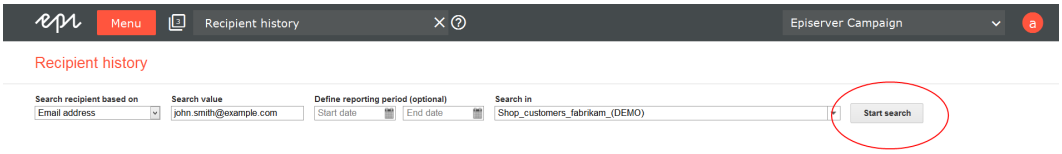
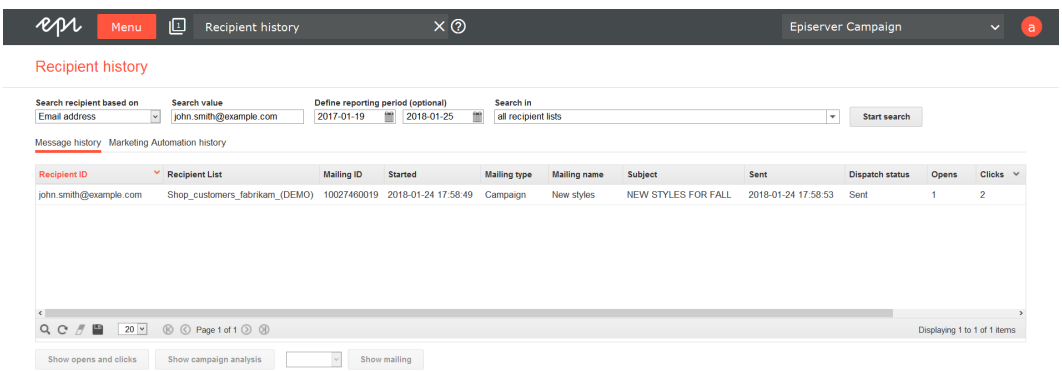
6. Once you have completed all fields, click **Start search**.



The search may take several minutes depending on the number of recipient lists being searched. The message "Loading, please wait..." is displayed at the bottom on the right in the status bar to indicate that a search is currently being executed.

✔ When the search has completed, the message history for the recipient will be shown. The list starts with the most recent message.



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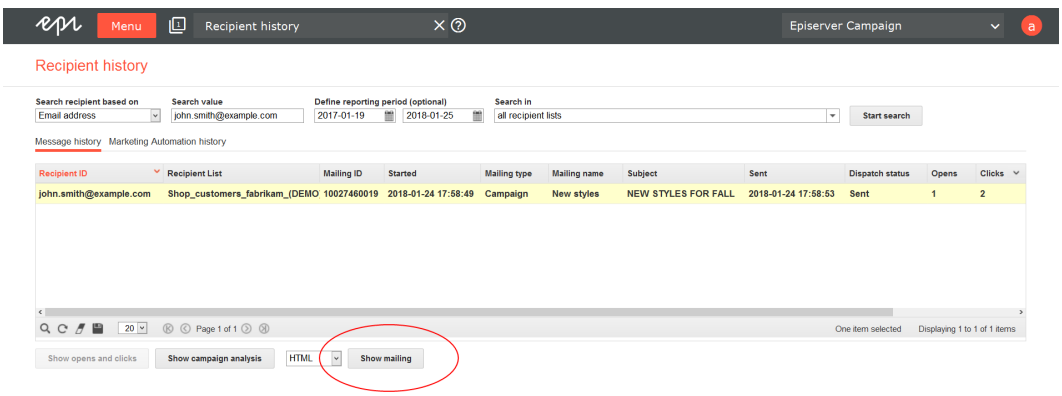
7. The message history provides you with the following information:
   - recipient ID
   - all recipient lists in which the recipient can be found
   - mailing IDs of all messages sent to this recipient
   - media types of the messages sent (email, SMS, Fax, push)
   - start times of the messages
   - mailing types (regular, special, temporary (test messages) or campaign)
   - mailing name
   - subject
   - send date
   - number of openings
   - number of clicks in the messages

   To display the number of openings and clicks, the users of your client must have permission to view action data. If your users do not have this permission but would like it, contact customer support.

   - send status

8. If you want to view the content of a message, click Show mailing. Depending on the media type selected, you can select a display option from the drop-down list to the left of the button. For example, if the media type is **Email**, you can choose to display the message as either HTML or plain text.



✔ The content of the selected message is displayed.

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It is always the current message content that is displayed. Older versions cannot be reconstructed. The message displayed may therefore differ in content from the message that the recipient actually received in the past if the message has been subsequently modified.

Display opening and click behavior

The recipient history can show you which messages the recipient opened and which links they clicked on in the message.

To display the number of openings and clicks, the users of your client must have permission to view action data. If your users do not have this permission but would like it, contact customer support.

To display the opening and click behavior of recipients for individual messages, perform the following steps:

1. In the **Message history** tab, select the message for which you wish to see the opening and click behavior.

   The number of opens and clicks is shown in the message history list in the **Opens** and **Clicks** columns.

✔ If opening and click data is available for the selected message, then the grayed out button `Show opens and clicks` is enabled.

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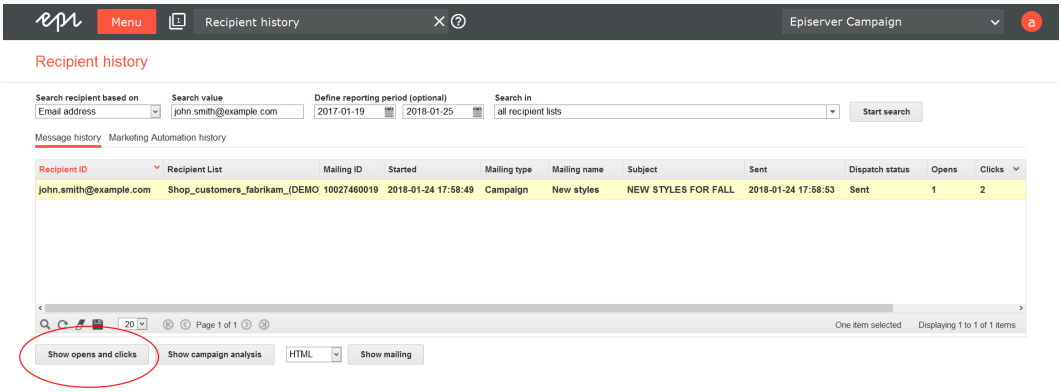
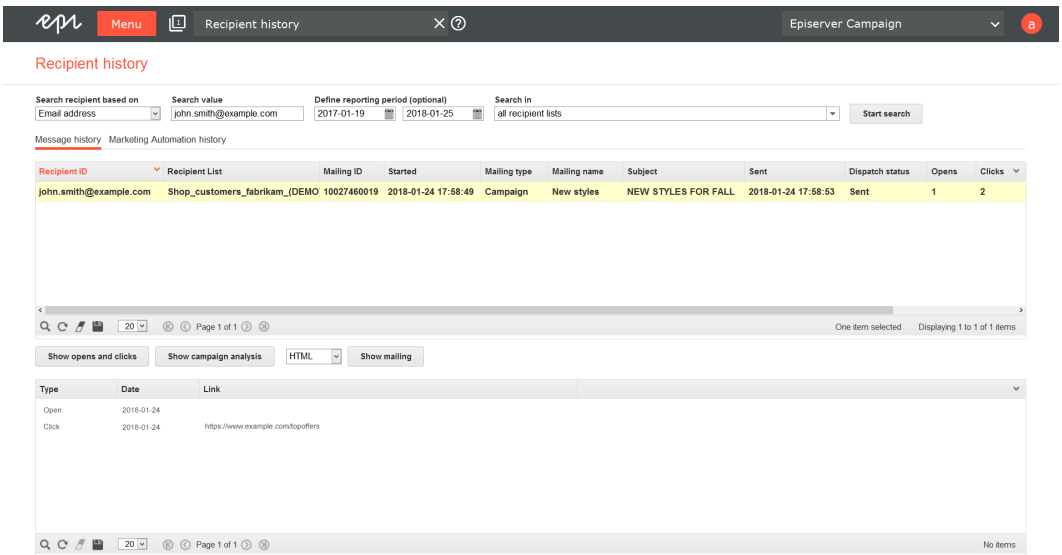
2. Click Show opens and clicks .



A new list expands.



3. This list shows you the action data type (open or click), the time, the mailing name, the mailing ID, which links were clicked, and the media types.

4. If you would like to see the message associated with the opening and click behavior, click Show mailing . Depending on the media type selected, you can select a display option from the drop-down list to the left of the button. For example, if the media type is **Email**, then you can choose to display the message as either HTML or plain text.

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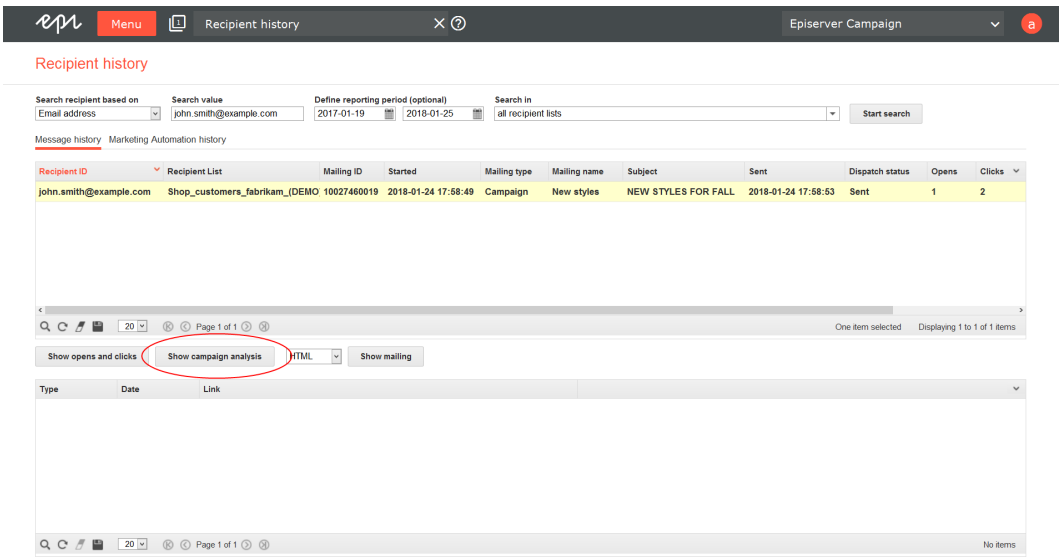
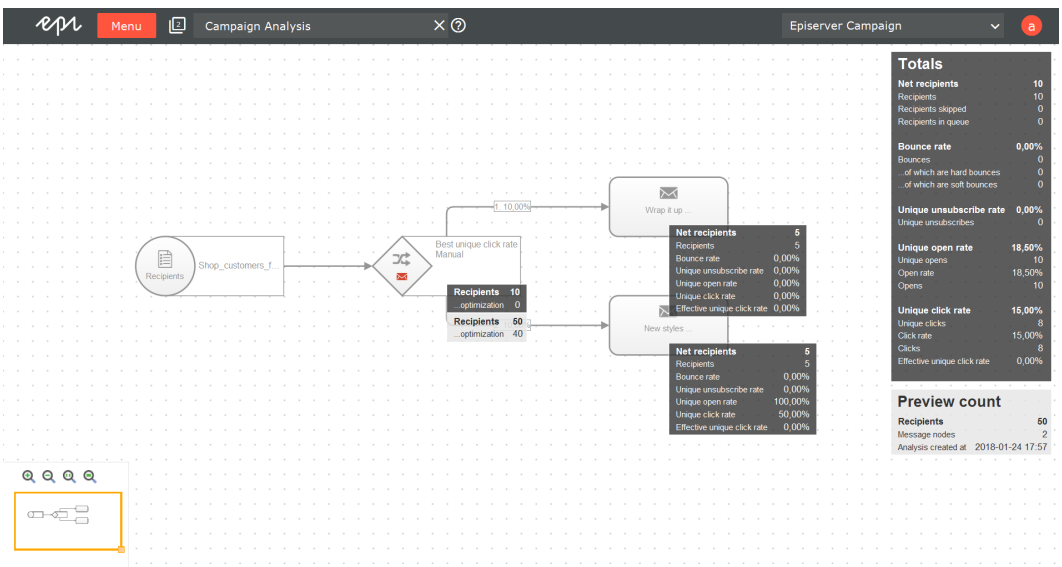
Show campaign analysis

If a message in the message history is part of a campaign or Smart Campaign, you can display the associated campaign analysis. To do this, perform the following steps:

1. In the **Message history** tab, click the message for which you want to view the campaign analysis.
2. Below the message history, click Show campaign analysis .



✔ A new window opens with the campaign analysis.



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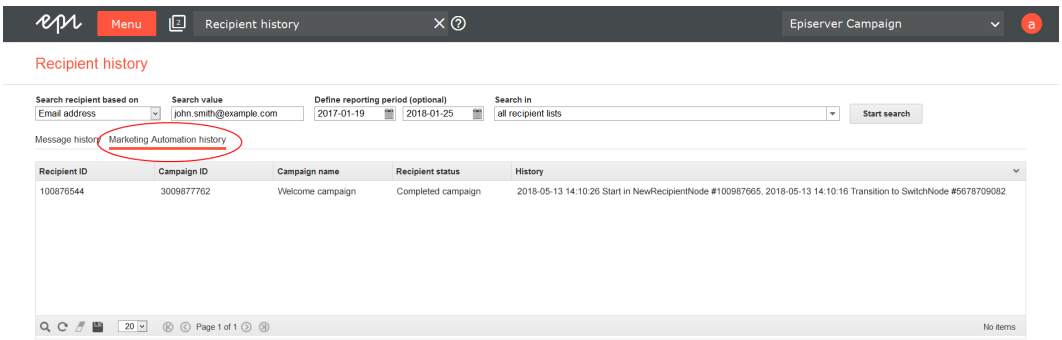
→ 3. The campaign analysis shows you the net number of recipients, the bounce rate, unique unsubscribe rate, unique opening rate, unique click rate, and effective unique click rate of the selected campaign, among other details.

Show Marketing Automation history

After searching for a recipient using a recipient ID email address, mobile phone number, fax number or push token, the first thing you see is the message history. From here, you can access the Marketing Automation history for the recipient.

To show the Marketing Automation history, perform the following steps:

→ 1. Next to the **Message history** tab, click the **Marketing Automation history** tab.



✔ The Marketing Automation history is displayed in a list.

→ 2. This list shows you the recipient ID, campaign ID, start date, campaign name, recipient status and a preview of the history.

→ 3. To get an ordered overview of the entire history for the recipient, select the corresponding Marketing Automation campaign from the list by clicking on the entry.

✔ The action list for the Marketing Automation campaign opens.

→ 4. The action list shows you recipient actions within the Marketing Automation campaign and the associated date.

Actions

Display	Event	Example
Started in "..."	The recipient has started in the specified node. The	*Started in "New recip-*

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Display	Event	Example
node #...	corresponding node ID is shown after the # symbol.	*ient" node #123456789*
Started in campaign "..." (#...)	The recipient was delegated within a campaign to another campaign. The corresponding campaign ID is shown after the # symbol.	*Started in campaign "More offers for you" (#123456789)*
Forwarded to "..." node #...	The recipient has been forwarded to the specified node. The corresponding node ID is shown after the # symbol.	*Forwarded to "Wait" node #123456789*
Wait until...	The recipient is waiting or has waited in a **Wait** node until the specified time.	*Wait until 2016-09-01 11:15:31*
... message "..." (#...) sent to recipient	The message was successfully sent to the recipient. The message media type (Email, "SMS", "fax" or "push"), the name of the message and the message ID (after the #) is shown. If you want to view the content of the message, select the corresponding entry and click Show mailing . Depending on the media type selected, you can select a display option from the drop-down list to the left of the button. For example, if the media type is **Email**, then you can choose to display the message as either HTML or plain text.	*Email message "Welcome" (#123456789) send to recipient*
Message ... sent to recipient (details no longer available)	The message was successfully sent to the recipient. The sending time is displayed. Further details cannot be displayed as these are no longer available. This message usually relates to test messages that were sent and whose content is not permanently stored by Episerver Campaign.	*Message 2016-09-01 11:15:31 sent to recipient (details no longer available)*
Successfully completed in node #...	The recipient successfully passed through the campaign and has been completed. The corresponding node ID is shown after the # symbol.	*Successfully completed in node #123456789*
Not successfully completed in node #...; Error: "..."	The recipient did not successfully pass through the campaign. The corresponding node ID is shown after the # symbol. The error is described.	*Not successfully completed in node #123456789; Error: "the recipient is on the blacklist"*

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Display	Event	Example
Recipient edited: ...	The recipient has been edited in Marketing Automation in the **Change recipient** node. The corresponding change is shown.	*Recipient edited: The value of the "Customer status" field changed to "Premium customer"*
Recipient not modified - Recipient is not in the recipient list "..." (#...) defined in the "Change recipient" node	The recipient has not been edited in the **Change recipient** node because the recipient is not in the specified recipient list. The recipient list ID is shown after the # symbol.	*Recipient not modified - Recipient is not in the recipient list "Existing customers" (#123456789) defined in the "Change recipient" node*
Copied to recipient list "..." (#...)	The recipient has already been copied to the specified recipient list. The recipient list ID is shown after the # symbol.	*Copied to recipient list "Premium customers" (#123456789)*
Recipient not copied – the recipient is already contained in recipient list "..." (#...)	The recipient was not copied to the recipient list because they are already in the specified recipient list. The recipient list ID is shown after the # symbol.	*Recipient not copied – the recipient is already contained in recipient list "Existing customers" (#123456789)*
Recipient not copied – the copy option was not selected	The recipient has been started in a parallel Marketing Automation campaign via the **Start in** node. The additional option **First copy to** was not selected.	*Recipient not copied – the copy option was not selected*
Updated in recipient list "..." (#...)	The recipient has been copied to a recipient list that has an existing entry for that recipient. The recipient dataset has been updated in the target recipient list. The ID of the target recipient list is shown after the #.	*Updated in recipient list "Existing customers" (#123456789)*
Updated in recipient list "..." (#...(and deleted in	The recipient has been copied to a recipient list that has an existing entry for that recipient. The recipient dataset has been updated in the target recipient list. The	*Updated in recipient list "Active customers"*

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Display	Event	Example
"..." (#...)	recipient dataset was deleted from the source recipient list. The names and ID (after the #) for the corresponding recipient lists are shown.	*(#123456789) and deleted in "Inactive customers" (#1122334455)*
Matched target group "..." (#...)	The recipient was assigned to a target group. The ID of the target group is shown after the #.	*Matched target group "Women" (#123456789)*

[1] Recipient history is not available for print messages

Export mailing and performance data

With this add-on, you can automatically export mailing and performance data to further process these data in an external data system. The data is exported into a CSV or XML file. The export runs in a defined interval, for example, daily at midnight or once a week. Exported data can be downloaded via SFTP from a secure server.

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

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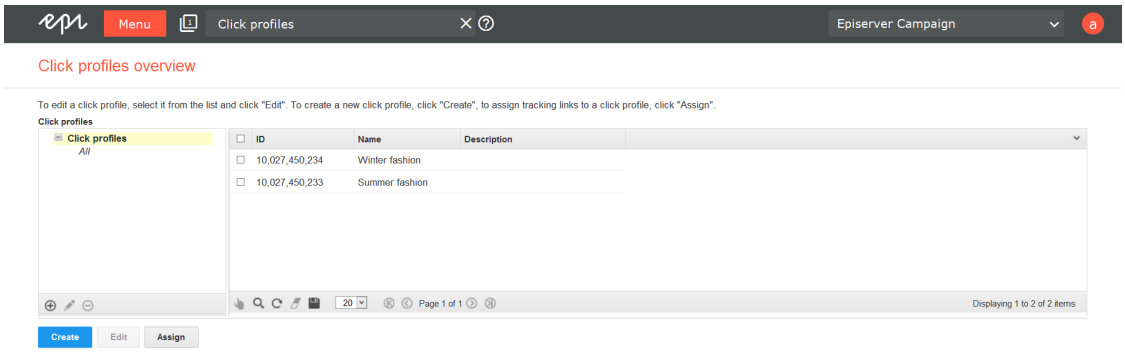
Click profiles



Click profiling allows target groups to be generated quickly and easily. Once set up, it runs automatically behind the scenes or can be controlled manually, if so desired. Click profiles work in a similar way to assigning keywords (tags) to blogs. The clicks users make are the basis for click profiling. This allows, for example, email recipients that frequently click on Blu-ray offers to be segmented via a click profile and then supplied with targeted and highly relevant information.

Link tracking is the most important tool for measuring the performance of campaigns and creating customized remailings. The management of tracking links – even covering several mailings – is made significantly easier with click profiling using Episerver Campaign.

Click profiling lets you create profiles – independent of individual mailings or links – that are associated with all the tracked links in your mailings. The assignment can be conducted manually or automatically. Once created, tracking links are tagged. Click profiles also enable the creation of target groups and generation of reports.

Click profiling complements the previous tracking link management – and its functions remain preserved. It is still possible to edit all links in a mailing individually via the **Tracking** tab in the **Edit mailing** wizard. Determine whether the link in the HTML and text version should be tracked and enter a description of the link.

➜ To start the function, open the start menu and under **Recipients**, click **Click profiles**.

✔ In the **Click profiles** window, all profiles are displayed in a list.

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Create and edit click profiles

Create click profile

To create a profile, perform the following steps:

1. Click Create.
2. The **Create click profile** window opens.
3. Optionally, in the **Folder** drop-down list, you can select a folder to save the new profile in.
4. Enter a name and an optional description.
5. Click Finish.

You may now start to assign links to the newly created profile. To learn how to do this, read Manually assign click profiles.

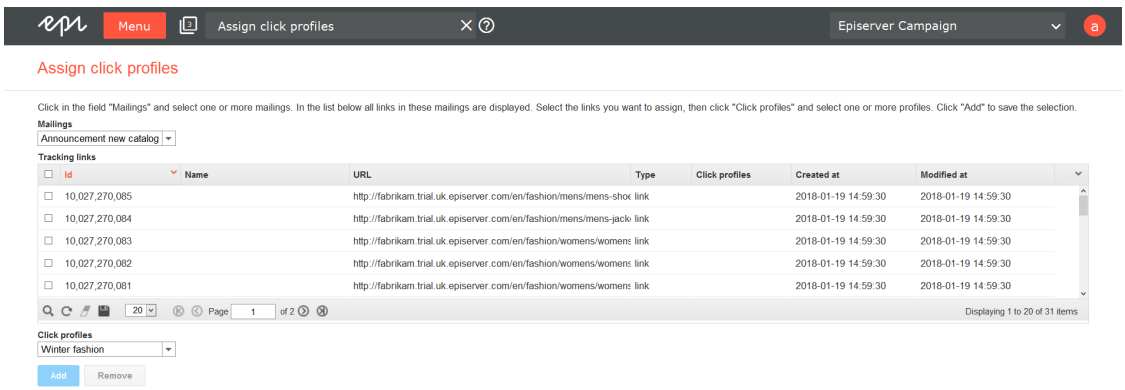
If you want to create a rule-based profile and automatically assign links, read Rule-based click profiles.

Edit click profiles

To edit a click profile, select it from the list and click Edit. Then, follow the instructions described in the section above.

Assign click profiles

Manually assign click profile



To assign links manually to one or more click profiles, perform the following steps:

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1. In the **Click profiles** window, select the desired click profiles and click Assign.
2. In the **Assign click profiles** window, in the **Mailings** drop-down list, select one ore more mailings to display all links from these mailings in the **Tracking links** list.
3. In the **Tracking links** list, select one or more links that you want to assign to a profile.

✔ The **Click profiles** drop-down list below this list shows all profiles. If you already selected a profile in the overview window, it is displayed.

4. You can change, add or remove profiles.

Note that both drop-down lists in this window allow the selection of multiple items.

5. To save the assigned links, click Add.

Remove assigned click profile

Manually assigned click profiles can be removed:

1. In the **Click profiles** window, click Assign and select one or more mailings.

✔ All links are shown in the list below.

2. Select a link and click Remove to unassign the profiles from that link. Automatically assigned profiles cannot be removed.

If you unassign a profile, it is only removed from the link. The profile itself cannot be deleted.

Assign click profiles when editing a mailing

You can also assign links to a profile when creating or editing a mailing. In the **Tracking** tab, select a link from the list and click in the **Profiles** field. Select one or more profiles from the selection window and click OK.

If you use a mailing template that has been configured accordingly, you will find a **Click profiles** tab in the editor window of a paragraph. To assign a profile to all links of a paragraph, select the check box next to the desired profile.

Manually assign rule-based profiles

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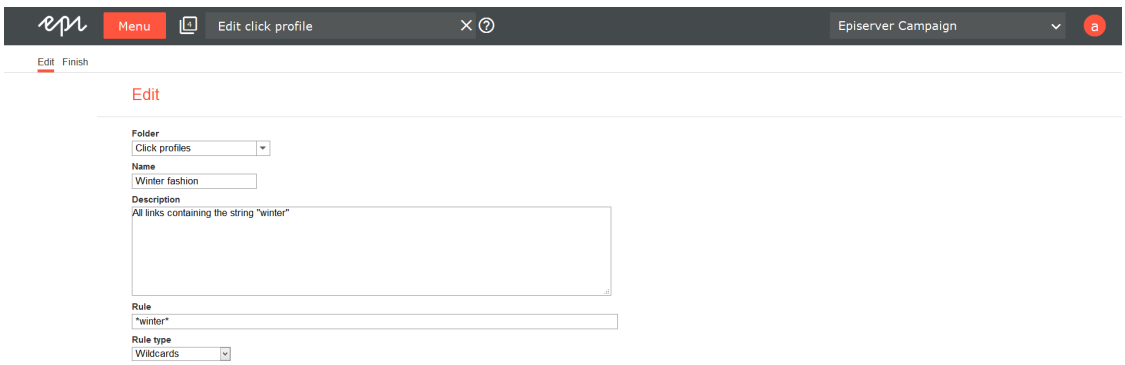
Rule-based profiles can also be assigned manually to a link which does not match the rule using the function described in the previous paragraph. These links may be considered the "exceptions to the rule". Reciprocally, rule-based profiles cannot be removed from a link that does match the rule.

Rule-based assignment



Rule-based click profiles automatically assign tracking links. To enable this, the link URL is analyzed according to the character strings it contains or on the basis of regular expressions. The rules for automatic assignment are configured during the creation or editing of a click profile. Two fields are allocated for this purpose. The first, **Rule**, contains details of the character string the URL of a link must contain, or what rules the construction of a URL must follow, so that a profile can be assigned. The second field lists the rule type. The rule and rule type must match together for rule-based assignments to function. Test all rule-based click profiles to ensure the desired result is achieved. Rule-based click profiles can be adjusted at any time, and all assignments will be automatically updated.

Rule-based assignments cannot be removed. If you change a rule, all assignments are updated. This means that links that are no longer applicable will also no longer be shown in the corresponding profile.

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Wildcards

Wildcards let you define character strings that must be contained in a URL for them to be assigned to a profile. Use the * (asterisk) or ? (question mark) symbols as placeholders for any number or an exact number of characters, respectively. Wildcards enable tracking link URLs with specific recurring character sequences to be categorized.

Example

The following link is to be analyzed with a wildcard click profile:

```
www.example.com/new_article/xy/ref=1234
```

If all tracking links to the newest articles in your online shop contain .../new_article/... in the URL, you would then formulate the following wildcard rule to automatically tag the link:

```
*/new_article/*
```

The two asterisk symbols (*) denote that any other characters can be placed to the left or the right of the character sequence.

Regular expressions

Regular expressions let you formulate sets and subsets of character strings with the help of syntactic rules. For example, you can define that a URL contains or does not contain specific characters. Regular expressions also allow the filtering of number ranges. They treat URLs as a character sequence (string) and analyze these according to the formal criteria of the regular expression.

Example

The following link is to be analyzed with a regular expression. In contrast to the URL in the previous example, this link does not contain a section that can be analyzed using a rule. This problem can, for example, be solved using a number range filter:

```
www.example.com/xy/ref=1234
```

In this case, the regular expression examines letter code and the article reference:

```
.*[x-z][x-z]/ref=12[0-9][0-9]
```

- A dot and an asterisk stand for any number of characters.
- Square brackets denote a range. In this case, the letters x, y or z can be position at the first or second position. The expression would thereby filter xx, xy, xz, yx, yy, yz, zx, zy and zz.
- This expression filters all number from 1200 to 1299. The first two numerals must always be 1 or 2. The numerals in third or fourth place can range from 0-9. Four numerals must exist.

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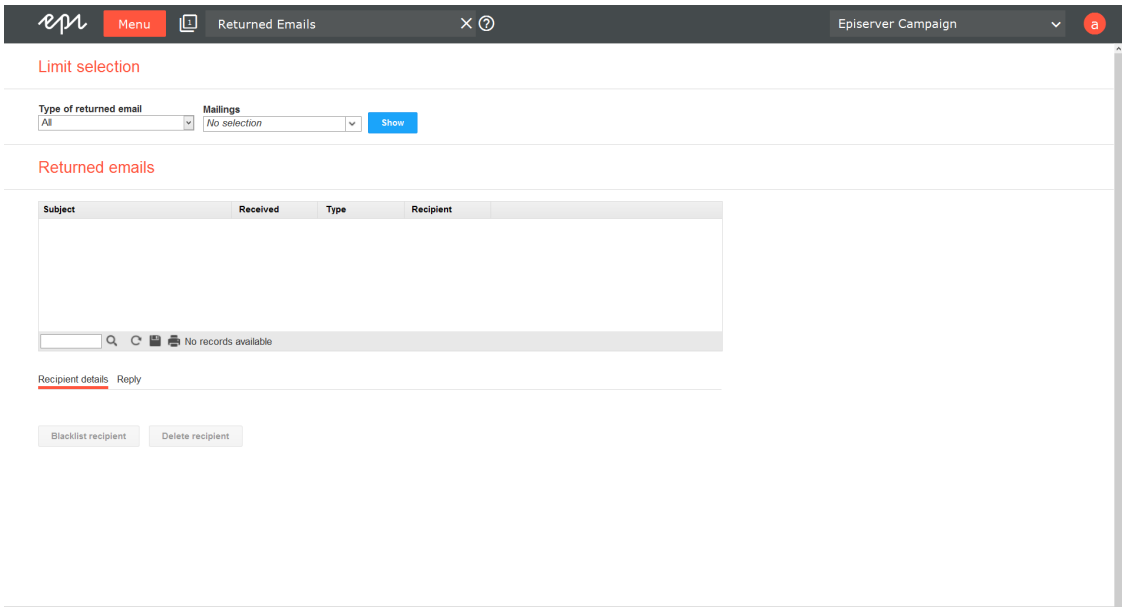
Returned emails – Overview

Returned emails have been sent back to the sending email server (in this case, the Episerver Campaign server) for various reasons. These can be viewed here. The genuine replies from the recipients are especially interesting, as sales potential can be found within them. And, they are generally a good source for feedback, which could lead to improved mailings.



Display returned emails

All returned emails are classified by filters. In the **Type of returned emails** drop-down list, you can select to show autoresponders, hard bounces, soft bounces, replies or all types. Hard bounces, soft bounces, and autoresponders are only shown for the sake of completeness. There is no need for action on your part, as Episerver Campaign automatically does it if necessary (see below).

To display returned emails, perform the following steps:

1. Open the start menu and, under **Returned emails**, click **Overview**.
2. Click the **Mailings** box and then select one or more mailings, whose returned emails you want to display. To select all mailings, select the check box in the table head.
3. Click OK.
4. In the **Type of returned email** list, click the type of returned emails you want to display.
   - **All**: All returned emails from all categories are shown.
   - **Hard Bounce**: Hard bounces identify email addresses which are unreachable. This occurs, for example, when recipients change providers/web mailers. They can no longer be reached at their original address. The respective recipients do not have to be manually

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erased from the recipient list, as Episerver Campaign automatically stops sending them emails after the third hard bounce. This threshold can be altered for your account/client, if another setting is desired.

- **Soft Bounce**: Soft bounces identify temporarily unavailable email accounts. If, for example, a recipient is on vacation and their mailbox reaches the capacity, they will only be able to accept new emails after they return from vacation and erase some of their emails. Soft bounces do not have to be edited manually, as most of these addresses are reachable again after a while.
- **Autoresponder**: Autoresponders are automatic replies. These are most often out of office notes ("On holiday until May 26" or similar). There is no need for action on your part for autoresponders.
- **Reply**: These are most likely real replies from recipients to your mailings. The standard setting for Episerver Campaign is that these replies are not sent to you but rather to the system. If you would like to receive the replies directly in your email account, contact your Episerver customer adviser. The filters in Episerver Campaign are set so that returned emails are only flagged as hard bounce, soft bounce, or autoresponder if there is a very high probability that they belong to the mentioned category. If a returned email does not match one of these categories, it automatically is flagged as a **Reply**. This guarantees that no real replies are lost. The consequence of this behavior is that some of the returned emails found in **Reply** may in fact not be real replies but belong to one of the other categories.
- **Spam**: Spammers in this world are so hard to prosecute because they do not send from their own mail servers but rather from the PCs of unsuspecting Internet users. Worms or Trojans (malware) are written and strewn across the Internet to infiltrate user's computers, so that they can then be misused to send spam. If your mailing is sent to one or more recipients whose computers have been infiltrated, then these computers in turn automatically send a spam to the mailing return address. The spam is received by Episerver Campaign, where it is recognized by the spam filter and put into the spam category.

→ 5. Click Show.

✔ The **Returned emails** area displays all returned emails.

Filters for the type of returned email

The filters of Episerver Campaign are set to specify a returned email with maximum likelihood as a hard bounce, soft bounce or autoresponder. If an email cannot be assigned to one of these categories, it is considered a real reply and moved into this category. In this way, it is ensured that no real reply is lost. On the other hand, it may happen that you will also find autoresponders and undelivered emails in this category.

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The **Received** column displays the sending date of the email. Bounces and autoresponders are usually sent the same day the mailing was sent, responses can be sent several days afterwards.

The **Type** column indicates the returned email type.

The **Recipient** column displays the sender of the email.

Show details

→ If you want to show the details of a specific returned email, click it. The **Recipient details** tab displays the email address, the registration date of the recipient and other data.

Display reply

To display the text of the email of the recipient, perform the following steps:

→ 1. Click the **Reply** tab.

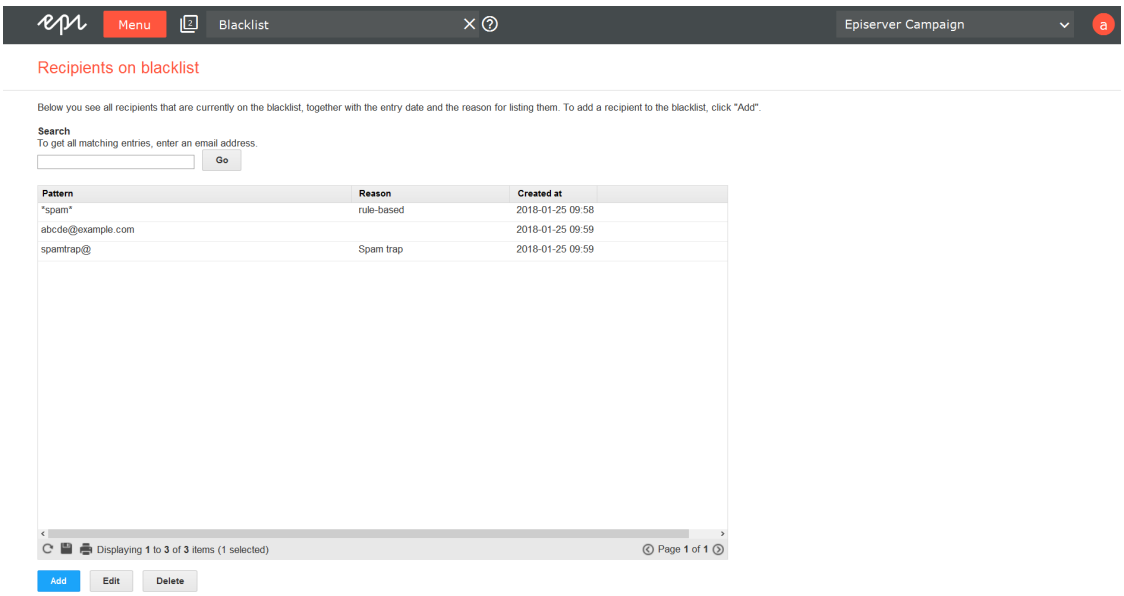
→ 2. Click Open in new window to increase the size.

→ 3. Click Print .

✔ The browser's print dialog opens automatically.

→ 4. Confirm the print dialog.

Blacklist overview



Episerver Campaign has a blacklist for all mailings that are sent from your client. If you add a recipient to the blacklist, the recipient will never again receive mails from you (at least not via

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Episerver Campaign). This also applies if the recipient registers again to receive your mailings, for example on your website. The only possibility to reverse this status is to remove the recipient from the blacklist. The list displays all recipients currently entered in the blacklist.

➜ To display the blacklist, open the start menu and, under **Blacklist**, click **Overview**.

Using the buttons below the list, you can perform the following actions for the blacklist:

- Add
- Edit
- Delete

Add

To add a recipient to the blacklist, perform the following steps:

➜ 1. Click Add.

✔ A blank line is added to the list.

➜ 2. Enter the email address for the recipient to be blacklisted. You may also enter a reason for blacklisting (e.g., complaint).

➜ 3. Click Apply.

Edit

To change the reason for blocking, perform the following steps:

➜ 1. In the list, click the entry you want to edit.

➜ 2. Click Edit.

➜ 3. Edit the content of the **Reason** box.

➜ 4. Click Apply.

Delete

To delete a blacklist entry, perform the following steps:

➜ 1. In the list, click the entry you want to remove from the blacklist.

➜ 2. Click Delete.

➜ 3. Confirm the deletion.

✔ The recipient is deleted from the blacklist and can receive your mailings again.

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Wildcards

Instead of entering a complete email address, you can use wildcards in the blacklist entries:

- Write a question mark (?) as placeholder for a single character. This option is useful, for example, if you are not sure about how a name is spelled correctly.
- Write an asterisk (*) as placeholder for one or more characters. Use this option, for example, to block all email addresses from a specific domain, e.g., "*@example.com" blacklists all email addresses from the domain "example.com". This option is useful if you have problems with recipients from a specific domain.
- Alternatively, you can use placeholders in the domain part of an email address. For example, the entry "abuse@*" blocks all email addresses starting with "abuse". This account name is usually configured by companies and providers as a default email account for customer complaints. If somebody registers your newsletter for such an email address, it cannot only be annoying but cause serial problems and damage your internet reputation.

Find

→ To check whether an email address is already contained in a blacklist, enter the address in the entry field and click Go.

✔ If the email address has been blacklisted, it will be displayed.

It is also possible that more than one result is displayed. This may be the case if wildcard characters were used when entering the address (see above). When searching for "axel@example.com" the entry "*@example.com" would also be found. Even if "axel@example.com" were removed from the blacklist, Axel would still not receive mails because the entire domain has been blocked.

Feedback loop entries

If a recipient receives an unwanted email and marks it as spam, Episerver Campaign is notified by the corresponding email service provider, and the recipient is automatically added to the blacklist. Thus, you can ensure that you have no unsatisfied recipients in your recipient lists—and, in return, a clean recipient list with just a few complaints has a positive impact on the deliverability of your mailings.

Below you can see a typical reason of a blacklist entry due to feedback loop:

```
type=automatic;rule=FBL: AOL;mailing=12345678;m2u=987654321
```

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Import blacklists

When you are importing your recipients for the first time into Episerver Campaign, or if you frequently import recipients from your local list, it might be useful to import a blacklist as well. This function allows you to import a CSV file with blacklisted recipients or wildcard blacklist entries into your client. A blacklist entry can be a complete email address or contain placeholders. Also read the section Wildcards.

To import a blacklist, perform the following steps:

1. Open the start menu and, under **Blacklist**, click **Import**.
✔ The **Import blacklist** window opens.
2. Click Browse... and select a CSV file from your hard drive from which you want to import the blacklist entries.
3. Click Import options.
✔ The **Preview** area shows all entries encountered in the CSV file. The **Rule** column must contain the respective email addresses or wildcards to be blacklisted. Only this first column will be imported.
4. If the columns are not displayed correctly, change the separator and escape characters.
5. Usually, Episerver Campaign automatically recognizes the file encoding. If the characters of the entries are not correctly displayed, select an encoding type from the **File charset** list.
6. If the first line of the CSV file contains a table head with the column designations, select **Yes** in the **Skip first row** drop-down list.
7. Click Refresh preview to check your settings.
8. Click Reason.
9. Optionally, cou can enter a reason for blacklisting the imported entries. This may be helpful when you manage your blacklist entries later. It allows you to search entries by reason. Note that the reason you enter here applies to all imported entries.
10. Click Finished.

Cleanup blacklists

This function deletes blacklist entries by reason. If you want to delete a single email address or a blacklist rule (wildcard), use the delete entry function.

To remove blacklist entries, perform the following steps:

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1. Open the start menu and, under **Blacklist**, click **Cleanup**.

✔ The **Delete blacklist entries** window opens.

2. In the **Reason** box enter the reason for which you want to delete all entries, for example "complaint". Use the asterisk (*) placeholder for multiple characters and question mark (?) for a single character.

3. Click Count to see how many entries with this reason exist.

4. Click Confirm deletion.

5. Click Delete blacklist entries.

Import and export blacklist automatically

This add-on automatically imports a CSV file to update the blacklist entries. The file is transmitted via SCP and stored on a server provided by Episerver. The import into your client is handled automatically. You receive a success notification after each import. The import does not delete existing blacklist entries.

The automatic blacklist export writes all blacklist entries into a CSV file and stores it on a server provided by Episerver. You can download it automatically or manually from this server.

Import and export can be configured separately.

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

Change email addresses

In most cases, the email address is used as a unique ID to identify a recipient. Episerver Campaign uses this unique ID in various functions carried out during recipient import, mailing dispatch etc. Therefore, it is not possible to change a recipient's email address. However, with this add-on you can add the possibility of changing a recipient's email address in all sub-clients.

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

Export recipients by category

With this function you can automatically export recipient data by category into CSV files. The function uses the default categories of Episerver Campaign. For each default category, an individual CSV file

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will be created. Alternatively, a multiple list with flags for each category can be created. Default categories are:

- Active recipients
- Blacklisted recipients
- Post clicks (requires a web analytics software with export function)
- Recipients that exceeded the bounce limit

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

Import recipients by category

If you maintain your distribution lists in an external system, you can use this add-on to synchronize your external distribution list with the recipient lists at Episerver Campaign. This feature lets you automatically import recipients into your Episerver Campaign client. You can use this option, for instance, if you maintain and update your mailing list on your own system. The following categories can be imported in individual CSV files or as multiple lists with markers for each category:

- Recipients
- Unsubscribers
- Blocked recipients
- Post clicks (requires a web analysis program with export function)

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

Preference Center

For email marketing to succeed, it should offer recipients the greatest possible freedom of choice about what information they want to provide as well as what kind of information they want to receive and how often they receive it. The Preference Center lets recipients use an online form to set their own personal preferences and supply personal information. The form can be incorporated into your web presence as a standalone element or integrated into an existing template using iFrame.

Recipients can access the page via a link on your website or in a mailing and then edit their personal information. The information is transferred by HTTP API or SOAP API to Episerver Campaign and stored in the recipient data.

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Along with collecting/requesting a recipient's personal data, the Preference Center can also help you design tailor-made mailings. For instance, you can request information about the recipient's interests, offer a variety of different topics (channels) and let the recipient choose how often he/she would like to receive mailings (e.g. bi-weekly, monthly).

What data should be requested and for what purpose?

All data that the recipient enters in his/her profile is considered voluntarily disclosed personal information. As long as this information is submitted voluntarily and not disclosed to third parties, there is no limit on the type of data you can request. However, you should try to minimize the amount of data collected – requesting only data that is pertinent to the product and the email marketing channel. The recipient should be able to readily understand why and for what purpose the information is being requested—and as a result will be more willing to provide it. Minimizing data collection also means that you should only request information that you actually need and which serves to optimize the service you are providing to the recipient. Also, read the section on legal compliance.

If you are already conducting email marketing through Episerver Campaign, you can use the recipient lists in your client to see what recipient-based data is currently available. This data can be edited by users in the Preference Center. To optimize the content of your mailings, recipients should be provided with additional options. For example, you may want to furnish a listing of various areas of interest and allow the recipient to select one or more. Alternatively, you could offer several different channels for the recipient to subscribe to. Through dynamic marketing, you can place specific content in mailings associated with each channel, content which only subscribers to those channels will receive, while withholding content from those channels which the recipient has not yet subscribed to. Lastly, you can let the recipient choose how often he/she wants to receive mailings. The recipient can select whether they want to receive mailings on a weekly, bi-weekly or monthly basis. Some recipients who unsubscribe from newsletters may feel they are receiving emails from providers too frequently, while others might want to receive – and read – them more often.

As these examples show, the Preference Center can help you customize your marketing efforts to better suit your recipients' needs and interests. To take full advantage of the opportunities it provides, we recommend you develop a broad-based lifecycle marketing strategy. The Preference Center can be an important element in such a strategy or serve as the first step in generating data that can later be used for lifecycle marketing campaigns.

Legal compliance

In email marketing, data can be collected from required fields, only if it is essential for the purpose of distributing mailings. This only applies to email addresses, so other fields, like **Recipient name**, should not be required fields. You should indicate the purpose for which all personal information collected through the Preference Center will be used. For instance, you should point out that names are collected solely for the purpose of personalizing mailings. If you request address information, then you should indicate that this information is collected to provide news about offers limited to a specific geographic

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area etc. There are no limits on the information you can collect as long as you bear in mind that, except for email addresses, all information must be provided voluntarily.

Although not mandatory, it is certainly advisable to point out that none of the information collected will be disclosed to third parties. The same applies to notifications about data security protection. The text of a data protection notice need not be included on the form page itself, it suffices to include a link to the appropriate page. The data protection notice must contain information about the collection, storage, use and transfer of data. It must also reference the user's right to have data deleted and the obligation of the party collecting the data to provide information about that data.

Data exchange

The exchange of data between the Preference Center and Episerver Campaign is carried out via SOAP API. When a recipient opens the Preference Center through a mailing, the recipient ID is transmitted and the recipient data contained in the Episerver Campaign database is imported. Once the recipient has edited his/her profile, the updated data is transmitted back to Episerver Campaign via SOAP API.

You can also use HTTP API for the Preference Center. In this case, however, it will not be possible to import recipient data into a web form. The mailing ID and recipient ID (usually the email address), for example, can be forwarded from a mailing, and the recipient data is recorded in the database. However, the recipient will not be able to view his/her old data.

If you link to the Preference Center from your website, it will not be possible to identify the recipient ID. In this case, the recipient must first enter a recipient ID (usually the email address). Here, too, the same rule applies: If you are using SOAP API, recipient data can be imported to the form – which is not possible when using HTTP API.

Form fields

Depending on the type of fields used, the Preference Center form fields can be configured in different ways. Fields into which text is entered are set up as text fields. These include, for example, the fields **Email Address** and **Name**. Fields with fixed values can be set up as lists or using check boxes. Fields that list interests or topics should allow for multiple selections. If only a single item may be selected (e.g. frequency of mailings), you can use either a drop-down list or a radio button. The available fields are:

Caption	Type	Required field	Standard
Email address	single-line text field	✓	—

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Caption	Type	Required field	Standard
Last name	single-line text field	✘	—
First name	single-line text field	✘	—
Salutation	radio button, drop-down list	✘	—
Date of birth	data field with selection window	✘	—
Age	drop-down list (e.g. B. 20-30, 30-40 ...)	✘	—
Interests	list with check boxes	✘	—
Mailing frequency	radio buttons (e.g. weekly, bi-weekly, monthly)	✘	yes
Other fields, as requested	radio buttons, text fields, drop-down lists, check boxes	✘	—

Error messages

Error messages should appear as text directly above/alongside/beneath the applicable form. Alternatively, these messages may also appear at the top of the page, referencing the applicable field. The field being referenced should always be highlighted in color. The following provides several sample error messages:

Error	Error message
No email address entered	*Please enter an email address.*
Consent not provided	*You must indicate that you wish to receive this newsletter.*
Required information not entered	*Please complete all required fields.*

Design/Templates

Form pages should be kept simple and clearly arranged. Ideally, the user should not have to use the scroll bar to reach the bottom of a page. In other words, all fields in a form as well as the **Send** button should be arranged in such a way that they will display on all standard screens and in commonly used font sizes without needed to use the scroll bar.

Example: Preference Center of a tourist enterprise

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If Episerver creates and integrates a Preference Center for you, it will be set up as a separate page. You can link directly to this page or integrate it into a template using an iframe. If you choose the latter option, you will need to coordinate page width and height with our support team to make sure the content will display correctly.

To create a web form, provide us with a template in HTML format or a layout template as well as the error messages that go with it.

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Security hints

Password protection

To protect recipient data from misuse, access to the Preference Center must be password protected. Make sure that users are only able to access the Preference Center (i.e. their data) once they have verified authorization.

Changing email addresses

To prevent misuse, users should not be able to freely change their email address. The procedure used for changing email addresses could look like the following:

1. The recipient enters a new email address, which is then saved temporarily.
2. A double opt-in process is initiated for the new email address.
3. The address is changed only after the change is confirmed by the recipient. If not confirmed, the original email address is restored.

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Analytics

In this chapter you'll find everything you need to know about Episerver Campaign's diverse range of analysis tools. Find out how you can gather important statistics after dispatch, or check and optimize your mailings before you send them.

- Deep Analytics: Creating cross-client analyses with more than 30 measurement variables.
- Reports: Analyzing mailing statistics.
- Live Analytics: Creating RFM analyses.
- Pre-check for deliverability[1]: Checking displays and links with the most important providers before dispatch.
- Post click tracking: Analysing campaigns of recipients on a website.
- Visual link analysis: Displaying link clicks graphically.
- Visual link analysis of post clicks: Graphically displaying sales volume and number of orders generated via a link.
- Attention analysis: Creating heat maps.
- Activity overview: Displaying marketing activities within a defined period.

[1] This feature is only available in Germany.

Deep Analytics

Deep Analytics is a report suite, which you can flexibly configure and use to measure the success of your campaigns and evaluate mailings in detail. Choose any from a great number of measures and group them by chronological dimensions, recipient segments, click profiles and many more dimensions.

Moreover, Deep Analytics can be setup comfortably for automatic execution. Enter a time interval, upload your own Microsoft Excel template and receive the finished report in your individual layout (for example, as pivot table) recurrently by email.

Always up to date data

If you execute a Deep Analytics report, it will aggregate always up-to-date data from the system. The measures given in the report may vary slightly from the measures given for example in the mailing overview, since these data are not aggregated at each request, but in fixed chronological intervals.

Your main benefits with Deep Analytics:

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- Detailed individual reports based on raw data
- Browser-based pivot tables and visualizations
- Seamless integration with Microsoft Excel
- Unparalleled variations of measures, groupings and combinations
- Automated email dispatch of reports
- Cross-client, target group-specific analyses, sales and ROI reports

Use of raw data to enable incredible detail

The Deep Analytics are the easiest way to successfully amalgamate multifaceted data from your newsletters and campaigns. Our innovation puts you in the position to evaluate all your measures at any time and with little effort so that you can focus on the task of boosting sales. This know-how is based on large amounts of raw data that Episerver Campaign draws upon for each analysis. Our Deep Analytics module is an integrated solution that processes the raw data of past measures behind the scenes for all report requests to ensure you obtain the best available overview of your email marketing performance. No other solution is currently able to provide you with information at this level of quality and detail.

Analyze data using Excel – or simply with our software

The seamless exchange of reports between Episerver Campaign and CSV-based pivot tables represents a further highlight. This lets your individual templates be filled automatically by our software and visualized using pivot tables and diagrams. You also have the capability to edit and depict your pivot tables directly in Episerver Campaign. To enable this, the reports can be easily "clicked together" in Episerver Campaign beforehand.

Besides browser-based pivot tables and visualizations in Episerver Campaign, you can also initiate the export of data to Excel at any time. To obtain clear, detailed visualizations, you must correspondingly define your pivot tables just once. You may use the tables, graphics, diagrams and all further functions you are accustomed to in Excel for the creation of your report templates. Episerver Campaign supports both the xls/xlsx Excel formats as well as the CSV format.
The advantage of such integration is patent: Thanks to effective Excel/CSV support, you do without the time-consuming need to repeatedly prepare data anew. As such, you can concentrate on interpreting the aggregated, delivered reports and focus on the development of your email marketing measures.

Pivot tables in Excel

Excel-based pivot tables support easy data preparation and visualization – enabling fast monitoring of your performance figures. Large amounts of data can be reduced to a manageable level to aid the analysis. Get in touch with us if you require assistance with the creation of pivot tables or their visualization.

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Should you not wish to upload you own Excel template, the data is processed in the included standard template. This can be downloaded at any time and individually configured and edited in Excel according to your specific wishes. Once amended, upload the file to Episerver Campaign once more. Naturally, you also have the option to load the template directly in Episerver Campaign as a pivot table for editing.

Multidimensional analyses par excellence

To obtain detailed analyses, it is decisive to have access to a large number of measures. However, this large volume of data also means that reports can often be unclear and confusing. This is now a thing of the past thanks to the new Deep Analytics. Each measure represents a building block in your report template. More than 30 different parameters can be "clicked together" and prioritized in Episerver Campaign via drop-down lists and drag & drop. This ensures you never lose sight of developments in your email marketing KPIs.

The tremendous analytical depth that our software permits is certain to impress you. The most diverse groupings and combination of measures as well as complex nested structures are possible – such as according to target groups, click profiles or even specific fields of data in your email distribution list. Naturally, all data can also be depicted according to time, no matter if by year, month, day or calendar week.

The flexible grouping of data and the variable depth of detail ensure all measures are always shown in the desired combination: Do you wish to separately analyze the opening rates of the last five mailings according to "male" and "female"? This type of evaluation couldn't be simpler with our report innovation. Just as with the measures, you can arrange every grouping using drag & drop. This provides you with the opening rates of the separate individual mailings according to the selected target groups. Conversely, to see the opening rates of the separate individual target groups according to the selected mailings, you simply need to drag the **Target group** grouping to the front. In total, significantly more than 500 combinations of measures and groupings are at your disposal.

Supreme flexibility is also provided in terms of the time periods to be evaluated. Besides unlimited, freely selectable assessment intervals, incremental analyses are also supported. Instead of unclear, confusing data, you thereby always receive exactly the information that has been newly acquired since the desired report was executed the last time.

Regular reports via email

You can execute each report at the intervals you wish and have these automatically sent to a group of recipients via email without needing to log yourself into our software. As such, your individual analyses are comfortably delivered to your inbox – weekly, monthly or whenever you decide. This means you no longer need to manually invoke evaluations such as regular sales reports again. Furthermore, you can automatically inform managers and colleagues in your company regarding the performance of your email marketing measures. The completed reports are reliably sent on the date specified and in the layout selected. All reports retrievable by Episerver Campaign – including those manually retrievable for

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Microsoft Excel – can be dispatched. The report templates to be sent and the list of recipients are naturally also adjustable at any time.

Analyses across multiple clients

Simultaneous evaluations of multiple clients are possible with the Deep Analytics – without the need to merge the report data from the respective separate clients. You may also restrict the analysis to a particular mailing type or specific recipient segment or even evaluate split mailings individually. The reporting period can be freely selected and can extend from just a few hours or weeks to several years. You therefore have the possibility, for example, of evaluating a mailing practically in real time for openings and clicks just hours after dispatch. Furthermore, with every new analysis you also can compare the performance against analyses made over the past years. This not only lets individual campaigns and measures to be analyzed in great detail over long timeframes but also allows success factors to be identified for the future.

Target group-specific evaluations

The performance of individual target groups can be easily and effectively monitored and controlled with Episerver Campaign. Besides observing the development of particular recipient groups over time, target group-specific campaigns can be evaluated in freely defined periods. No matter how specific the target group selection you desire is, the information can be called up for several clients with just a click of the mouse. Key KPIs such as return on investment or sales per recipient can also be returned at any time. These analysis options are not least valuable when considered in combination with targeted response management, lifecycle and reactivation measures.

Introduction

➜ To start Deep Analytics, open the start menu and, under **Analytics**, click **Deep Analytics**.

✔ The introduction page is displayed at first use.

This page contains some hints about Deep Analytics reports and links to the introduction video and the online help of Episerver Campaign. If you are familiar with Deep Analytics, you can just skip this page by selecting the **Do not show this tab again check box** in the lower left corner of the window.

Overview

➜ To manage your reports, open the start menu and in the **Analytics** menu, click **Deep Analytics**.

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✔ The **Overview** tab shows all report templates on the upper section and all executed reports of the selected report template in the lower section. In the overview, you can manage reports and report templates: Create new or edit already existing report templates, execute reports manually, display executed reports or download reports.

Report templates and ad hoc reports

→ To manage your reports, open the start menu and under **Analytics**, click **Deep Analytics**.

✔ The **Overview** tab shows all report templates on the upper section and all executed reports of the selected report template in the lower section.

In the overview, you can manage reports and report templates: Create new or edit already existing report templates, execute reports manually, display executed reports or download reports.

Create report template

→ To create a new report template, in the **Deep Analytics – Overview** window, click New.

✔ The **New report** wizard opens in a separate window and guides you in four steps through the process of creating a report template:

- Step 1 - Introduction - Helpful links and information
- Step 2 - Report data - Select report data, measures and groupings
- Step 3 - Report template - Upload report template and configure automatic execution
- Step 4 - Sending options - Configure automatic dispatch of the report

Execute ad hoc report

After performing the steps 1 and 2 to create a report template, you can execute the report without configuring or saving it as a template:

→ 1. Click Execute report now.

→ 2. To use an Excel template, click Browse... and select a template. If you do not upload an Excel file, the Episerver default template is used.

→ 3. In the **Reporting period** area, select:

- **Specify period** and specify the reporting period, a start date and an end date for the period you want to analyze.
- **No restrictions** to define that all available data is analyzed at execution of the report. Note that by using this option the amount of data to be analyzed can be very large in the course

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of time. The execution of such reports may take some time. This option is activated by default.

→ 4. Click Sending options.

→ 5. If you want to send the report via email, enter the email addresses of the recipients in the **Recipients** box (separate multiple email addresses with a comma). In the **Subject** box, enter the subject of the email and in the **Message text** box, enter the message text of the email. Executed reports are attached to the emails. If you do not want to send the reports via email, leave these fields empty.

→ 6. Click Start execution.

✔ After execution, the report is shown in the overview window and can also be downloaded as an Excel or CSV file.

Reporting period

With the help of the reporting period, you specify the period of time from which the data that is used for the analysis is derived.

Edit or delete report template

→ 1. To edit a report template, select it in the **Report templates** list and then click Edit.

→ 2. Perform the same steps as described in the Create report template section.

→ 3. To delete a report, click a report template in the **Report templates** list and then click Delete.

Deleting or changing a template does not affect already executed reports. Reports that have been executed from deleted templates are shown as **Not assigned to a template** in the list.

Create report template: Step 1 – Introduction

The Introduction tab contains some hints about Deep Analytics and links to the video tutorial.

If you are already familiar with Deep Analytics, just skip this page. If you do not want to display this page any more, select **Do not show this tab again** in the lower left corner.

→ Click Report data.

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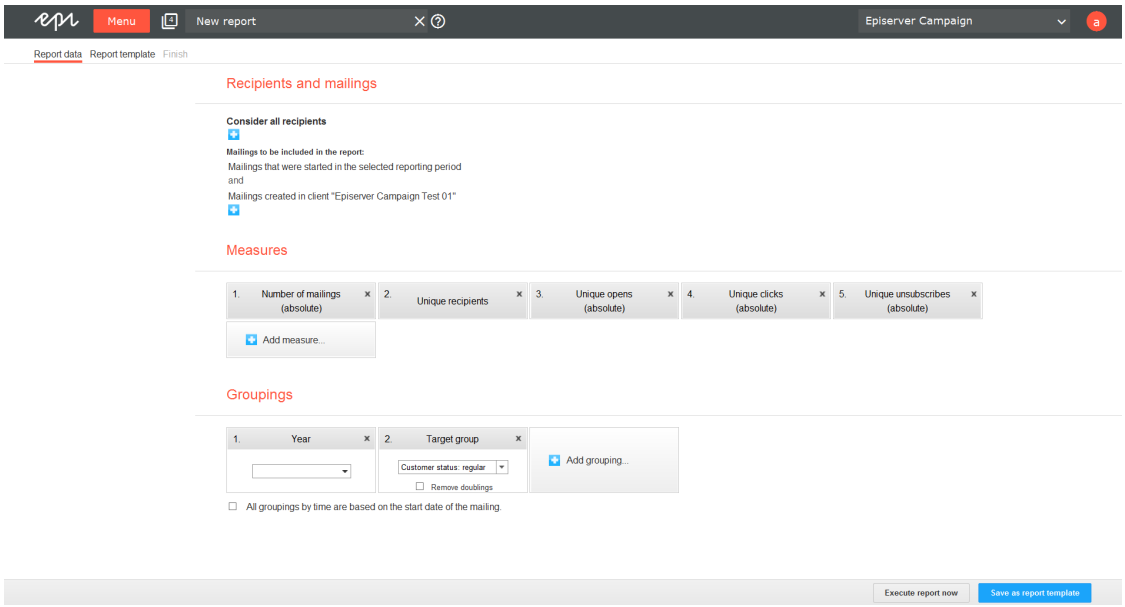
Create report template: Step 2 – Report data



In the **Report data** tab you can define, which data will be evaluated for this report. To define the report data, you can specify global parameters, measures and groupings as described in the following.

Recipients and mailings

If you only wish to analyze a subset of the available data, in the **Recipients and Mailings** area, define which recipient segments, mailings and clients you want to analyze. If you do not perform the following steps, all relevant data will be used for the report.

To analyze only a subset of the recipients by using available target groups, perform the following steps:

1. Below **Consider all recipients**, click +.
2. In the list, select a target group and click the tick button.
3. Repeat these steps if you want to consider multiple target groups for this report.

Selected target groups are applied to all selected clients when the report is being executed. Note that this may lead to unwanted results if, for example, a target group uses filter rules that do not match recipients in all selected clients. See the example given below to learn more about this.

If you want to analyze only certain mailings, mailing types or clients, perform the following steps:

1. Below **Mailings to be included in the report**, click +.
2. If you want to create an exclusive condition (e.g. "is not", "contains not", "has not"), in the left drop-down list, select **not**.

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- 3. In the next drop-down list, you can select whether to:
  - consider only mailings of a specific **client**. This option is available only if you have access to more than one client. By default, the client in which you are logged in, is pre-selected.
  - consider only mailings from specific **folders**. You can select the folder in the next step.
  - consider only specific **mailings**.
  - consider only mailings that have been started at a specific **date**. You can select the start date in the next step.
  - consider only mailings that have a specific **type**. You can select the mailing type in the next step.
  - consider only mailings that were started within the **reporting period**. This option is activated by default.
  - additionally create nested conditions by clicking the parentheses **(...)**.
- 4. In the next drop-down list, click the value for the selected filter option. The values given in this list depend on what you have selected in the previous step.
- 5. Click the tick button.

Reporting period

With the help of the reporting period, you specify the period of time from which the data that is used for the analysis is derived. By default, only mailings that have been started in the given period will be analyzed. If you remove this filter, opens, clicks, unsubscribes and returned emails or post clicks that have been created from mailings started prior to the reporting period, but have only been opened, clicked, unsubscribed, etc. within the given period, will be analyzed, too. For the **mailings** and **recipients** measures , this difference is irrelevant.

You can combine several of the above mentioned conditions. Click + to add a new condition. Between two conditions, either the logic relation **AND** or **OR** can be used. To change the type of relation, click it. Due to correctness and logical disambiguation, target groups without parentheses can contain only one type of logic relation. Thus, if you click a relation, all relations between the rules are changed. If you want to use different types of logic relations, use parentheses.

Parentheses group rules hierarchically to handle them with priority, like in a mathematical equation. Rules within the parentheses are applied first and then the rules in the second level and so on. Parentheses are especially useful if a complex condition is planned and different logic terms (**AND** or **OR**) shall be used.

Example: Report period

You want to analyze all recipients, that have subscribed after January 1st 2011 and that have indicated the interest "Travel".

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1. Create the respective target group.
2. In the **Consider all recipients...** area, select the target group.
3. If you want to include all sub-clients and analyze only regular mailings, in the **Consider all recipients...** area, select the mailing type **regular**.
4. Add another filter selecting the main client and all sub-clients.
5. Make sure that all recipient lists in all clients contain the field "interest" and verify that the values used in this field are identical, otherwise the selected target group may not work correctly.

Measures

A measure is defined as a numerical measure of a user interaction or characteristic of your mailing. Measures have the following characteristics:

- Measures are always expressed in form of a number.
- Measures are stand-alone entities. If you look at a metric in a stand-alone fashion, it provides you with information about the overall performance of your mailing.
- Measures form the columns of a report structure.
- You can combine any number of measures in a report.

For an overview and description of all available measures, see Measures.

In the **Measures** area, define which measures are to be evaluated for this report:

1. Click + **Add measure...**.
2. Click a measure group (for example, **Mailings**).
3. Click a measure inside the measure group (for example, **Number of mailings**).
4. Repeat these steps for all measures you want to analyze.

You can drag and drop the selected measures to the desired position, whenever you want to change it.

Groupings

Groupings (dimensions) have the following characteristics:

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- Groupings are non-numerical data fields.
- Unlike measures, groupings are not stand-alone entities, i.e., groupings are not generally meaningful when viewed individually.
- Groupings, when coupled with measures, provide meaningful context to the data.
- Groupings are used to segment a measure.

For an overview and description of all available grouping, see Groupings.

In the **Grouping** area, select on which groupings the above mentioned measures are to be matched:

1. Click + **Add grouping...**.
2. Click a group (for example, **Date or time**).
3. Click a grouping inside this group (for example, **Year**).
4. In the list, click a value (for example, the year **2018**) if you want to specify the grouping more exactly.
5. Repeat these steps for all groupings the report shall evaluate.

Time-based reports: To create a time-based report, select the **Date or time** grouping and then the time interval. To create a mailing-based report, select the **Mailing** grouping.

Groupings based on the start date: If you select the **All groupings by time are based on the start date of the mailing** check box, all recipient-specific actions (for example, opens) for a mailing are arranged according to the start date of the mailing (mailing-time-based analysis). If you clear the check box, all recipient-specific actions are arranged separately according to the point in time at which they occurred (time-action-based analysis).

Example: Time-based reports

Mailing "New Year Newsletter" was started on 01/01/2018.

Mailing "Information Newsletter" was started on 06/02/2018.

Time-action-based analysis (check box cleared):

Calendar week	Mailing	Opens (absolute)
01/2018	New Year Newsletter	5
03/2018	New Year Newsletter	5
04/2018	New Year Newsletter	10

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Calendar week	Mailing	Opens (absolute)
06/2018	Information Newsletter	5
08/2018	Information Newsletter	5
09/2018	Information Newsletter	5

Mailing-time-based analysis (check box selected):

Calendar week	Mailing	Opens (absolute)
01/2018	New Year Newsletter	20
06/2018	Information Newsletter	15

Remove doublings

You can remove double counts from the **Click profile**, **Link**, and **Target group** groupings automatically. For example, recipients that belong to several target groups will be counted for each of these target groups. A recipient in the target groups *Men* and *Age 30-40 years* is counted twice if you use both target groups in a report. Thus, the sum line also contains doublings. To prevent this, select the **Remove doubling** check box in the grouping. Thus, the report shows only one match for an arbitrary (applicable) target group of a recipient.

Example: Doublings in target groups

The recipient belongs to the target groups "Men" and "Age 30-40 years".

If you clear the **Remove doubling** check box, the following is shown in the report:

	Target Group	Recipients (absolute)
	Men	1
	Age 30-40 years	1
Sum line		2

If you select the **Remove doubling** check box, the following is shown in the report:

	Target Group	Recipients (absolute)
	Men	1
	Age 30-40 years	0

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	Target Group	Recipients (absolute)
Sum line		1

Combinations

You can combine multiple groupings to get multidimensional reports. For example, select the groupings **Mailing** and **Target group** to get a report that shows all measures per mailing and for each target group.

User-defined arrangement

You can drag and drop the selected groupings to the desired position, whenever you want to change it. The arrangement of groupings affects the result of the report correspondingly. If you commute the groupings **Mailing** and **Target group** in the above mentioned example, you get an evaluation of all target groups and each target group is evaluated according to all mailings.

Calculation of rates

To calculate rates (as percentages), for example open or click rates, make sure to select a grouping that delivers meaningful report data. To get, for example, the open rate (as percentage) of a mailing, the **Mailing** grouping must be selected. In the same way, the open rate by target group can be displayed. Open rates in a time-based report, though, do not deliver meaningful values.

Measures

The following groups are available for a Deep Analytics report. Each of the measure groups contains a number of measures that are displayed when you click on a group:

Mailings

All measures that refer to mailings:

Parameter	Description
Number of mailings (absolute)	Total number of all outgoing mailings.
Total volume	Number of recipients + Number of responses (total, non-unique) less skipped recipients.

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Recipients

All measures that refer to recipients:

Parameter	Description
Unique recipients	Number of unique recipients. If, for example, a recipient is contained in two recipient lists, the recipient is only counted once.
Recipients (absolute)	Total number of recipients.
Recipients minus bounces (absolute)	Total number of recipients whose email addresses did not produce a bounce (message of non-deliverability).
Recipients minus bounces (%)	Percentage of recipients whose email addresses did not produced a bounce (message of non-deliverability).

Opens

All measures that refer to opens:

Parameter	Description
Unique opens (absolute)	Total number of unique opens. Multiple opens by a recipient are seen as a unique open.
Opens (absolute)	Total number of unique opens.
Unique open rate (%)	Percentage of unique opens in relation to the number of recipients minus bounces.
Open rate (%)	Percentage of total opens in relation to the number of recipients minus bounces.
Unique gross open rate (%)	Percentage of unique opens in relation to the total number of recipients.
Gross open rate (%)	Percentage of total opens in relation to the total number of recipients.

Clicks

All measures that refer to clicks:

Parameter	Description
Unique clicks	Number of unique recipients that clicked an arbitrary link in a mailing. It does not

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Parameter	Description
	matter how often and which link the recipient clicked.
Clicks (absolute)	Total number of clicks.
Click rate (%)	Percentage of total clicks in relation to the number of recipients minus bounces.
Unique click rate (%)	Percentage of unique clicks in relation to the number of recipients w/o bounces.
Unique gross click rate (%)	Percentage of unique clicks in relation to the total number of recipients.
Gross click rate (%)	Percentage of total clicks in relation to the total number of recipients.
Effective unique click rate (%)	Percentage of unique clicks in relation to the unique opens.

Responses

All measures that refer to responses/returned emails:

Parameter	Description
Unique responses (absolute)	Total number of unique responses.
Unique response rate (%)	Percentage of unique responses in relation to the number of recipients minus bounces.
Unique autoresponder (absolute)	Total number of unique autoresponder messages.
Unique autoresponder rate (%)	Percentage of unique autoresponder messages in relation to the number of recipients minus bounces.
Unique replies (absolute)	Total number of unique replies.
Unique reply rate (%)	Percentage of unique replies in relation to the number of recipients minus bounces.
Unique bounces (absolute)	Total number of unique bounces.

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Parameter	Description
Unique bounce rate (%)	Percentage of unique bounces in relation to the number of recipients.
Unique hard bounces (absolute)	Total number of unique hard bounces (email address permanently unreachable).
Unique hard bounce rate (%)	Percentage of unique hard bounces in relation to the total number of bounces.
Unique soft bounces (absolute)	Total number of unique hard bounces (email address temporarily unreachable).
Unique soft bounce rate (%)	Percentage of unique soft bounces in relation to the total number of bounces.

Unsubscribes

All measures that refer to unsubscribes:

Parameter	Description
Unique unsubscribes (absolute)	Number of unique clicks on the unsubscribe link.
Unique unsubscribe rate (%)	Percentage of unique clicks on the unsubscribe link in relation to the number of recipients minus bounces.
Unique net unsubscribe rate (%)	Percentage of unique clicks on the unsubscribe link in relation to the total number of recipients.

Post click measures

These measures are available only if post click tracking is configured for your client. If you select the **Post click...** measure, a new window opens in which you can define the measure. To do this, perform the following steps:

1. Enter an arbitrary **name**.
2. Select a **service**. If you are using only one service, it is already selected.
3. Select whether the measure you wish to create is a number, a **sum** or an **average**.
4. If you have selected **Sum** or **Average** in the previous step, select a post click value from the drop-down list. If you do not wish to filter this value further, the definition can be saved.

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If you have selected **Count** in the previous step, no filters can be added.

5. To add filters, in the **Filter** area, click + and select an operator. The possible operators differ depending on whether the selected post click represents a number or a string value.
6. Enter a reference value to compare the post click value with. This comparison will be executed according to the operator selected in the previous step.
7. Click the tick button.
8. To add further filters values, click + and repeat the previous steps.
9. Click Save.

✔ The newly created post click measure is now shown in the **Report data** tab in the **New report** window.

Entering multiple values

If you select the operator **is one of the following values**, you can enter multiple values in one text box, for example, if you want to copy values from a CSV file:

1. Select the operator **is one of the following values** and enter the values, for example, comma-separated.
2. Open the drop-down list, click **Separate multiple values** and in the box, enter the used delimiter symbol.
3. Click the tick symbol.

✔ The entered values are now handled as single values.

Groupings

The following data are available for a Deep Analytics report, which allow you to group your data:

Parameter	Description
Date or time	Group by the date or time.
Domain	Group by the recipient domain.
Recipient list field	Group by the different kinds of recipient list fields of your recipient lists.
Click profile	Group by the used click profiles.

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Parameter	Description
Link	Group by the links used in the mailing.
Link type	Group by link types used in the mailing.
Mailing	Group by your mailings.
Client	Group by the clients you are allowed to access.
Folder	Group by the folders in which you store your mailings.
Subject	Group by subject lines that you use in your mailings. Only the standard subject line is taken into account here, irrespective of further target group-controlled subject lines.
Target group	Group by the recipients which apply to specific target groups.
Email program/Browser	Group by the email programs and browsers used by the recipients.
Operating system	Group by the operating systems used by the recipients.
Media type	Group by the media types.
Contact frequency	Group by the number of messages received by the recipient within the reporting period.

Create report template: Step 3 – Report template

To configure the automatic execution and sending of your template, perform the following steps after adding measures and groupings:

1. In the **New report** window, in the **Report data** tab, click Save as report template.
2. In the **Name** box, enter the name of the report template.
3. In the **Folder** list, you can select a folder in which you want to save the report template.
4. To use an Excel template, click Browse... and select a template. If no template is uploaded, the Episerver default template will be used.
5. In the **Interval** area, click the interval for the generation of reports from this template. If you change the interval, make sure that the last execution has run at least one hour ago.

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- **Manually**: Reports can only be executed manually.
- **Weekly**: Select the day of the week and the time of day when the report should be executed.
- **Monthly**: Select the day of the month and the time of day when the report should be executed.

→ 6. In the **Reporting Period** area, click ...

- **Since last execution** to define that the report contains only data that has been added since the last execution of the report. This option is activated by default. The selected interval is already taken into account for the first execution. If you select the Weekly interval, a reporting period of one week is used for the first execution. If you change the weekly execution interval, for example from Monday to Wednesday, the next execution uses the reporting period beginning Wednesday of the previous week.
- **No restrictions** to define that all available data is evaluated each time the report is being executed. Note that by using this option the amount of data to be evaluated can be very large in the course of time. The execution of such reports may take some time.

→ 7. Click Sending options.

Reporting period

With the help of the reporting period, you specify the period of time from which the data that is used for the analysis is derived. The **No restrictions** option relates only to the previously defined global report parameters and measured data. If you evaluate all openings in a report and have defined that only mailings that were started in 2018 should be considered, all openings for mailings of the year 2018 are counted. The **Incremental** option evaluates only data that is added since the last execution of the report.

Create report template: Step 4 – Sending options

If you do not want to send the reports via email, leave these fields empty.

If you want to send the report via email, perform the following steps:

→ 1. In the **Recipients** box, enter the email addresses of the recipients (separate multiple email addresses with a comma).

→ 2. In the **Subject** box, enter the subject of the email.

→ 3. In the **Message text** box, enter the message text of the email.

✔ Executed reports are attached to the emails.

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→ 4. Click Save.

✔ The final tab confirms that the report template has been saved.

→ 5. Close the window.

✔ The new report template is shown in the upper section of the **Deep Analytics – Overview** window.

Execute, display and download reports

Execute a report from a report template

You can execute a report from any of the templates directly in the overview. To manually execute a report, perform the following steps:

→ 1. In the **Report templates** area of the overview, click a report template the new report should be based on.

→ 2. Click Execute report now.

→ 3. To use an Excel template, click Browse... and select a template. If you select nothing here, the Episerver Campaign default template will be used.

→ 4. In the **Reporting period** area, select the option

- **Specify period** and specify the reporting period, in which the data should be evaluated.
- **Since last execution** to define that the report contains only data that has been added since the last execution of the report. This option is activated by default. The selected interval is already taken into account for the first execution. If the report is executed weekly, a reporting period of one week is used for the first execution. If you change the weekly execution interval, for example from Monday to Wednesday, the next execution uses the reporting period beginning Wednesday of the previous week.
- **No restrictions** to define that all available data is evaluated at execution of the report. Note that by using this option the amount of data to be evaluated can be very large in the course of time. The execution of such reports may take some time. This option is selected by default.

→ 5. Click Sending options.

→ 6. If you want to send the report via email, enter the email addresses of the recipients in the **Recipients** box (separate multiple email addresses with a comma). In the **Subject** box, enter the subject of the email and in the **Message Text** box, enter the message text of the email. Executed reports are attached to the emails. If you do not want to send the reports via email, leave these fields empty.

→ 7. Click Start execution.

✔ Depending on the amount of data to be processed, the execution of a report may take a while. As soon as the report has been executed, you can display and download it in the list in the lower section.

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Reporting period

With the help of the reporting period, you specify the period of time from which the data that is used for the analysis is derived.

Display and download a Deep Analytics report

To display and download a report, perform the following steps:

1. In the **Report templates** area of the overview tab, select a report template.

✔ The area **Executed Reports** displays all reports, that have been executed from the selected template.

2. If you want to display a report that was not executed from a template, click **Not assigned to a template** in the **Report Templates** area.
3. In the **Executed Reports** area, select a report and click Show as table to display the report in the standard HTML table without formatting.To display the report immediately as a pivot table, click Show as pivot table.
4. To display the report in a chart using Microsoft Excel, click Download as Excel file.

The Excel format gives you many possible ways of reporting and displaying your data. You may use your own Excel template or the Episerver default template to create your own analyses and display the data in several charts or pivot tables. To learn more, see Data evaluation using Microsoft Excel.

5. To download the report in a CSV file, click Download as CSV file.

The CSV file contains comma-separated values. This file format can be used to import the report data into another application.

Open CSV files with Microsoft Excel

Episerver Campaign creates CSV files in UTF-8 without BOM. Microsoft Excel incorrectly interprets the format as ISO-88591. To correctly open CSV files in Excel, perform the following steps:

1. Open a blank Excel spreadsheet.
2. Click the **Data** tab.
3. In the Get external data area, click **From text**.

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4. Select the file to open and click **Import**.
5. In the **Original data type** area, click **Delimited**, set the file origin (character encoding) to UTF-8 and click **Next**.
6. Select the **Delimiters** check box, **Semicolon** and click **Next**.
7. Click **Finish**.

Data evaluation using Microsoft Excel

As an alternative to the CSV format, you can download your data as Microsoft Excel spreadsheet. The Excel format allows rich formatting, calculations and output in pivot tables and in a chart. To use your own Excel template, download the default template, customize it and upload it afterwards. This Excel template contains the report data in the first worksheet grouped by the selected groupings. The second worksheet contains a copy of the data without sum fields. Use this worksheet to reference data you wish to display in further tables or charts (e.g. pivot tables).

In general, the following standards apply when formatting the Excel templates:

- **Supported file formats**: Episerver Campaign is able to handle files using the Excel '97 format (file suffix .xls) and Excel 2007 (file suffix .xlsx). We do not guarantee support of all functions and formatting of these two formats.
- **Data export and data format**: The exported data are exported into the first (table with sum fields) and second worksheet (table without sum fields). Do not change these worksheets, otherwise the correct export of the data fails. The format of the header page is completely adopted, but not the content. The data formats of the first data row (row 2 in the Excel worksheet) are adopted. Thus, values can be formatted and the formatting can be changed.
- **Evaluations**: Evaluations can be performed on the second and all subsequent worksheets. Because an unlimited number of rows may be added when executing the report, chart data, pivot tables and formulas must always be designed for a very large number of data rows. This especially applies to reports without time restriction.
- **Pivot tables**: Automatic updates must be turned on startup.

Upon request, we create Excel templates with pivot tables, charts and using the layout of your choice. Contact our customer support.

Pivot tables

To organize and display huge amounts of raw data that are created with the Deep Analytics, you can aggregate these data in Pivot tables. Pivot tables can be created in the online view as well as in the downloadable Excel templates. The great advantage of Pivot tables is the ability to analyze and show what is important without losing any details. In a Pivot table, the orientation and grouping of the data can

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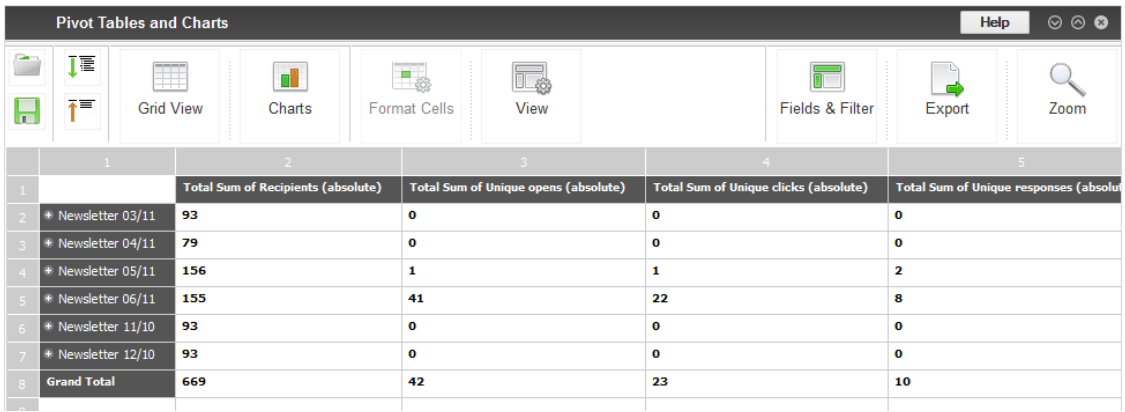
simply be changed as well as the hierarchical order of groups and categories, so that one and the same Pivot table can be used to display different kinds of analyses scenarios. Raw data are stored in the background. Even if you group data or omit categories in the table or chart display, no data is eliminated and you can switch back to display all data at any time.

Example

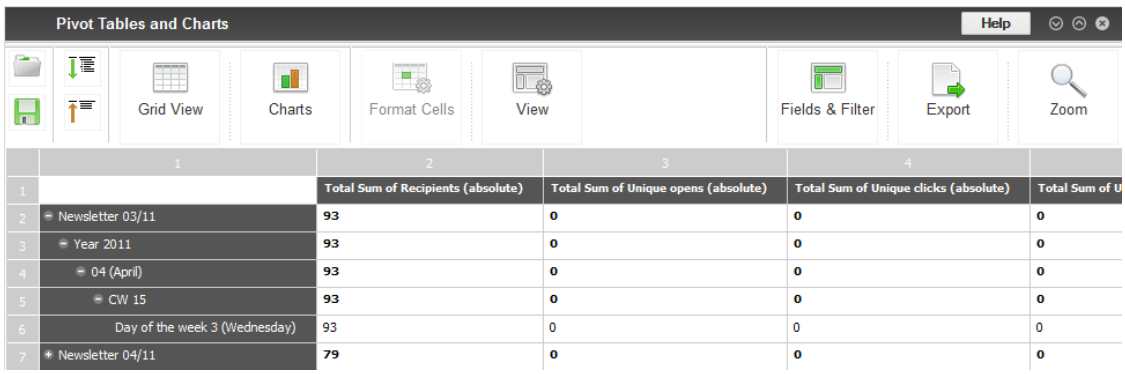
The following example demonstrates how you can use Pivot tables for exact analyses of the desired data and details, using different criteria in one and the same report. By grouping, sorting and omitting data, you get reports that can be captured at a glance. You do not lose any data, though. Should it be necessary to show more details, you can unfold the table and re-order groups and categories at any time.

The following image shows an analysis of recipients, opens and clicks by mailing:



	Total Sum of Recipients (absolute)	Total Sum of Unique opens (absolute)	Total Sum of Unique clicks (absolute)	Total Sum of Unique responses (absolu
+ Newsletter 03/11	93	0	0	0
+ Newsletter 04/11	79	0	0	0
+ Newsletter 05/11	156	1	1	2
+ Newsletter 06/11	155	41	22	8
+ Newsletter 11/10	93	0	0	0
+ Newsletter 12/10	93	0	0	0
Grand Total	669	42	23	10

→ You can break down the same analysis – by clicking the **+** sign next to the grouping and without creating a new table – to the year, month, calendar week and day of the week, as shown in the following image:



	Total Sum of Recipients (absolute)	Total Sum of Unique opens (absolute)	Total Sum of Unique clicks (absolute)	Total Sum of U
− Newsletter 03/11	93	0	0	0
− Year 2011	93	0	0	0
− 04 (April)	93	0	0	0
− CW 15	93	0	0	0
Day of the week 3 (Wednesday)	93	0	0	0
+ Newsletter 04/11	79	0	0	0

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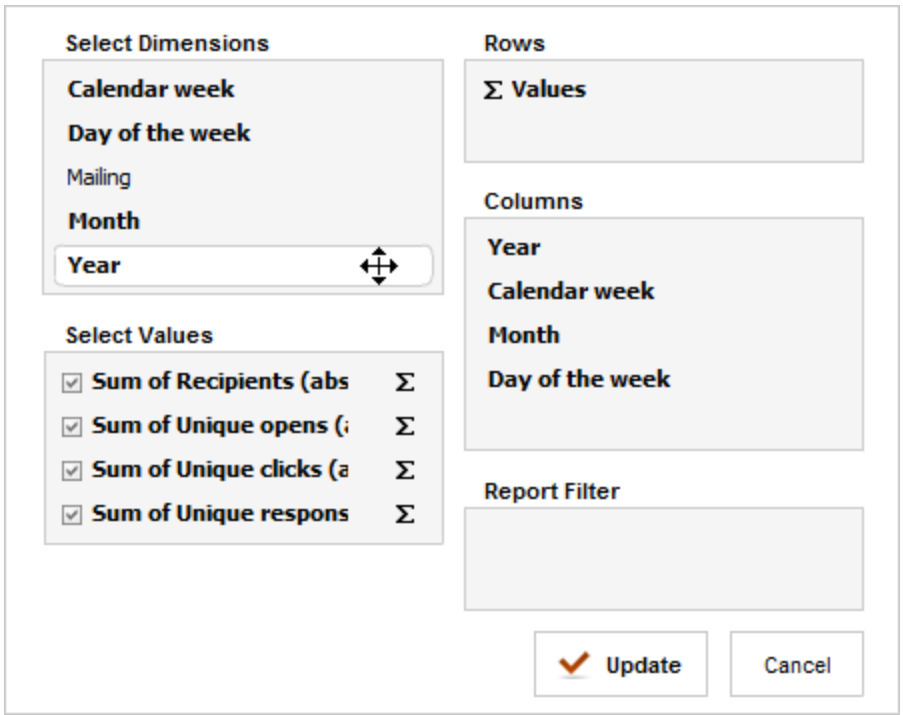
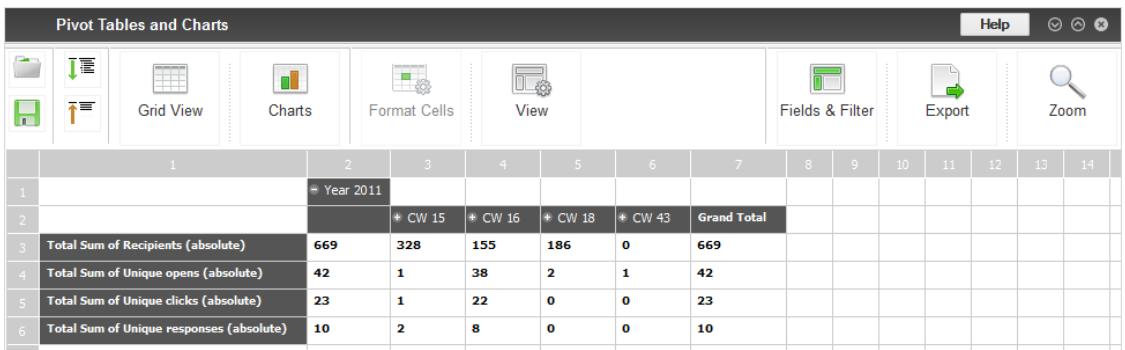
➜ Click the **Fields & Filters** button and drag and drop groupings, measures, lines and columns as shown in the following image. Note that the grouping **Mailing** has now disappeared and the analysis is now time-based:



➜ Finally, click **Refresh**, to create a new analysis:



	Year 2011					
		CW 15	CW 16	CW 18	CW 43	Grand Total
Total Sum of Recipients (absolute)	669	328	155	186	0	669
Total Sum of Unique opens (absolute)	42	1	38	2	1	42
Total Sum of Unique clicks (absolute)	23	1	22	0	0	23
Total Sum of Unique responses (absolute)	10	2	8	0	0	10

Reports

This module makes the simple analysis of the mailings' most important statistics possible. For this reason your account is normally provided with one or more report templates. If this is not the case or if special requirements for the analysis are necessary, which are not covered by the templates, it is

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possible to create a new report at any time that can be saved as a template, so that it can be used for subsequent mailings.

➔ To open the report overview, open the start menu and, under **Analytics**, click **Reports**.

Create and edit reports and report templates

Your account should already be equipped with one or more descriptive report templates. With the help of these report templates you can easily analyze the main characteristics of your mailings. You can also create your own report templates with a few clicks.

To create a new report or report template, perform the following steps in the **Manage Reports** window:

➔ 1. Click New.

✔ The **New Report** window opens.

➔ 2. In the **Title** box, enter a name for the new report, which allows you to identify it later, especially if you create several different reports.

➔ 3. To use a report as report template for other mailings, select the **Template** check box.

➔ 4. In the **Type of chart** list, select how the data of your report shall be displayed:

- **Aggregated**: The selected indicators are displayed as aggregated numbers, for example the total number of clicks or the total open rate within a particular time frame.
- **Time elapsed**: Here the indicators are displayed per hour, day, week, and month.

➔ 5. Click Chart.

✔ The **Create Chart** window opens.

Select measures and mailings

You can use various measures for your report:

- Unsubscribes
- Number of recipients
- Clicks
- Opens
- Returned emails
- Post Click – you can use this measure if your client has been set up accordingly.

These measures can be shown in various configurations. These include:

- Absolute: This is the total number of clicks, opens, etc. The indicator is called **Clicks** or **Opens**.
- As a percentage: The information is provided as a percentage.

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- Based on domains (cumulative): This displays how many events (clicks, etc.) were activated by recipients whose email addresses indicate a specific domain (such as "example.com"). In this way you can recognize how active recipients are from the various providers.
- Based on domains as a percentage (cumulative): Same as above, but as a percentage.
- Based on domains (separated): Divides the display of the measured events based on the recipient email addresses.
- Based on domains as a percentage (separated): Same as above, but as a percentage.
- By profile: This option is only available to display the clicks by click profile. Unique or total clicks can be displayed. Note that a unique click in a profile means that the recipient has clicked once on any link in this profile. Several unique clicks on different links of that profile still produce only one unique click in the profile.

To add measures and mailings to your report, perform the following steps:

1. In the **Data source** area, in the **Category** drop-down list, select the measure you want to analyze.
2. Click the **Mailings** list and then select the check boxes next to the mailings, you want to analyze. If you select more than one mailing, the results are compared in the same chart. So you can compare multiple mailings easily.
3. Click OK.
4. Click Add.

✔ In the **Preview** tab a bar with the respective data is displayed.

Execute report

To analyze a mailing based on an existing report template, perform the following steps in the **Manage Reports** window:

1. In the overview, click the mailing for which you want to execute a report. If you select multiple mailings, the results are easily comparable within the report.
2. In the **Templates** area, click the template you want to use.
3. Click Show.

✔ The **Show Report** window opens.

You can also select all mailings (by selecting the check box in the header of the table), **Last mailing**, **Last 2 mailings**, **Last 3 mailing**s, or **Last 5 mailings**. This is particularly useful if you would like to save the new report as a template and use it for other mailings at a later time. If you select the relative information just mentioned, it is certain that the report will always display correct data.

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Edit report template

1. To edit a report template, in the **Templates** area, click the report template you want to edit and then Edit .

✔ The **Edit Report** window opens.

2. Then, go on as described in Create and edit reports and report templates.

Delete report template

To delete a report template, in the **Templates** area, click the report template you want to delete and click Delete .

Evaluate and edit charts

1. Click the **Data** tab to display the numerical values.

✔ For each measure that you add a tab is displayed in the upper area of the window next to **Data source**.

2. Click this tab to make additional settings for each measure, e.g. to change the name or the color of the bar.

Depending on the data source, other options are available, such as limiting the links to be accounted for when counting clicks.

3. To remove a measure, click the **x** on the tab.

4. To change the arrangement of the bars in the chart, use the arrows on the tabs to move them right or left. You can change the order of the bars in the same way.

5. In the right area of the window, you can define the chart type you want to use as well as labels, size and background color.

6. Afterwards, click Refresh to see how your settings affect the graph and table view and then click Save .

✔ You have the following options to customize your charts:

- General
- Chart
- X axis
- Y axis

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General

1. In the **Chart type** list, click the chart type you want to use:
   - **Bar chart**: Use this type for example to compare recipients, opens, clicks and unsubscribes.
   - **Area chart**: This type displays two indicators on a time elapsed base to compare both.
   - **Line graph**: This is another time elapsed chart type to visualize the progress of an indicator over a certain period.
   - **Pie chart**: This type visualizes for example a percentage distribution. Use this type to display items or values that sum up to a whole or 100%.
2. In the **Title** box, enter the title of the chart.
3. In the **Data orientation** list, whether the table in the **Data** tab is displayed horizontally or vertically.
4. Select the **Use URL as link description** check box to display links with their URL to know what is behind each link.
5. Select or clear the **Show captions** check box to hide or show the captions.
6. Define the width, height, transparency and border color of the chart.
7. Select the **Show border** check box, to frame the chart.

Chart

In the **Chart** tab, you can customize the layout of your chart:

1. In the **Orientation** list, select whether the chart is displayed horizontally or vertically.
2. In the **Background color**, click the background color you want to use and in the **Chart border color** list, click the frame color you want to use.
3. Select the **Show bar border** to frame the each bar of the chart.
4. Define the border color of the bars.
5. In the **Caption orientation** whether the captions of the bars are displayed horizontally or vertically.

X axis

1. Select or clear the **show** check box to show or hide the X axis.
2. In the **Title** box, enter a title for the X axis.
3. Select or clear the **Show grid lines** check box to show or hide the grid lines.
4. Define the grid line color and grid line style.

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Y axis

1. Select or clear the **show** check box to show or hide the Y axis.
2. In the **Title** box, enter a title for the Y axis.
3. Select or clear the **Show captions** check box to show or hide the labels.
4. Select or clear the **Axis marks** check box to show or hide the axis marks.
5. Select or clear the **Show grid line**s check box to show or hide the grid lines.
6. Define the **grid line color** and **grid line style**.

Save new report

In the bottom of the **New Report** window, you can see all analyses that have been created for this report. For the **Graphics and data** tab the complete analysis is shown (which means with image and text); for the **Graphics** or **Data** tabs only those display formats are shown. Using the buttons below every analysis you can perform the following actions:

- **Edit**: Opens a window where all the settings for the analysis can be changed.
- **Delete**: The analysis is erased from the report after the security dialog has been confirmed.
- **Up**: The analysis is moved up in the report.
- **Down**: The analysis is moved down in the report.

If one of the charts in the report is time elapsed (option **Type of chart**), then the tabs found over the chart can be used to switch between the hour, day, week, or month modes. With the **Start date** and **End date** fields, the exact time period can be set that is to be displayed. Click Apply to recalculate the chart. If Apply to all is clicked instead, then all of the charts in the report will also be recalculated based on the newly set time period.

To save the report, click Save.

Live Analytics

With Live Analytics you always have an eye on recipient development and create RFM analyses in real time from your entire recipient dataset or from a defined portion of your recipients. Live Analytics hold all recipient data from your mailing lists and analyze recipient actions from the previous 12 months. The data is updated daily. Live Analytics also ensure high performance for the analysis of large quantities of data. Once set up, the running analyses show you an always up-to-date image of your recipients with regard to the customer life cycle, preferences, sales volume and purchases.

What is an RFM analysis?

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RFM analysis is an effective procedure for the analysis, prediction and optimization of the customer base. RFM stands for the following three parameters that are indicators of the probability that a customer will react to a marketing campaign in the future:

- **Recency**: This parameter indicates how long ago the most recent action of a customer was made. Actions include purchases, aborted orders or a product view.
- **Frequency**: This parameter indicates the frequency with which the actions specified above were performed by a customer.
- **Monetary**: This parameter indicates the sales volume that a customer has previously generated. This means, for this value, only the purchase action is analyzed.

The combination of these three parameters makes it possible to increase profitability and the return on investment (ROI) of your campaigns. Each recipient is assigned to an RFM segment. You therefore always have an eye on the entire recipient base and can view individual segments from it, constrain them further and define them as a target group for a campaign.

Live Analytics packages

You can carry out up to three Live Analytics analyses at the same time using the standard package. If you need further analyses, then you can expand your standard package. Contact customer support for further information.

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Overview

➜ To start Live Analytics, open the start menu, and under **Analytics**, click **Live Analytics**.

✔ The following **Live Analytics** window shows an overview of running analyses in the selected display (pie, line or bar chart).

➜ You can arrange the analyses in the desired order in this window using drag and drop. To do this, move the pointer over an analysis in the blue bars on the upper edge until the pointer switches to the **Drag and drop symbol** and drag the analysis to the desired position.

You can then perform the following actions in the overview:

- Create
- Detail view
- Edit
- Delete

Create

➜ To create a new analysis, click in the open field with the **Add symbol** and perform the steps described in the Create and edit Live Analytics analysis section.

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Detail view

→ To open the detail view, move the pointer over the analysis and click **Details** . For more information, see the Live Analytics detail view section.

The data is updated daily.

Edit

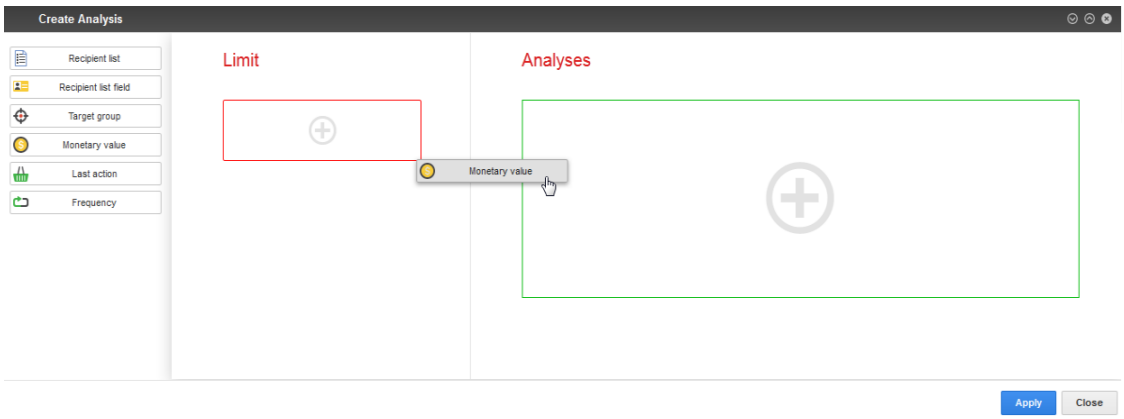
→ To edit the analysis, move the pointer over the analysis and click **Edit** . Then, perform the steps described in the Create and edit Live Analytics analysis section.

Delete

→ To delete an analysis, move the pointer over the analysis, click **Delete** and then Delete.

Create and edit Live Analytics analysis

Create analysis



To create a new analysis, in the **Live Analytics** window perform the following steps:

→ 1. Click in the open field with the **Add** ⊕ symbol.

✔ The **Create analysis** window opens.

→ 2. Drag the desired Live Analytics analysis items from the left action area to the areas **Limitations** (to perform a pre-selection of the analyzed recipients) and **Charts**.

→ 3. To edit an analysis item, move the pointer over the desired item in the **Limitations** or **Charts** area and click **Edit** .

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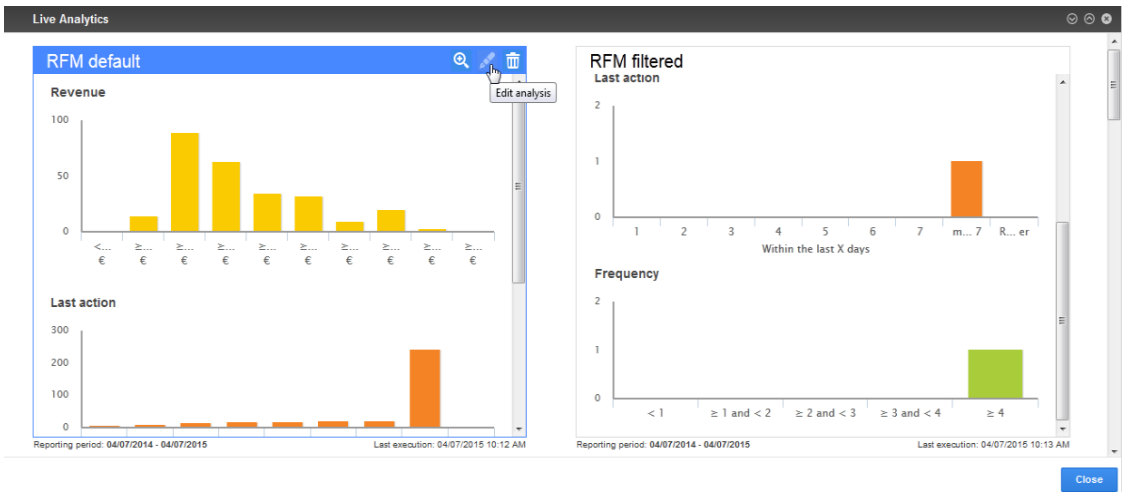
4. To change the chart type of an analysis item, move the pointer over the desired item in the **Charts** area and click the desired chart symbol for pie, line, or bar charts: . Further information on the various chart views can be found in Charts.
5. Configure the campaign activity as described in the section Analysis items.
6. To remove an analysis item, move the pointer over the item and click **Delete** .
7. You can arrange the analysis items in the desired order, both under **Limitations** and **Charts**. To move an item, move the pointer over the item. The pointer now switches to the **Move** symbol . Click and drag the item to the desired position.
8. Click Apply.
9. In the **Name** field, enter a name for the analysis and click Apply.

✔ The analysis is now shown in the overview. The computation of the analysis data can take some time. If no analysis data is available yet, a corresponding notification will be displayed. As soon as the computation of the analysis data is concluded, the charts and data will be displayed.

Notes

- An analysis must include at least one chart.
- You can include multiple charts in one analysis.
- Invalid parameters or missing configurations are displayed as soon as you add an analysis item as a constraint or chart.

Edit analysis



To edit an analysis, in the Live Analytics window perform the following steps:

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1. Move the pointer over the desired analysis and click **Edit** .

The **Edit analysis** window opens.

2. To edit an analysis item, move the pointer over the desired item in the **Limitations** or **Charts** area and click **Edit** .

3. To change the chart type of an analysis item, move the pointer over the desired item in the **Charts** area and click the desired chart symbol for pie, line, or bar charts: . Further information on the various chart views can be found in Charts.

4. To add an analysis item, drag it from the left action area to the Limitations area (to perform a pre-selection of the analyzed recipients) or the Charts area.

5. Configure the campaign activity as described in Analysis items.

6. To remove an analysis item, move the pointer over the item and click **Delete** .

7. You can arrange the analysis items in the desired order, both under Limitations and Charts. To move an item, move the pointer over the item. The pointer now switches to the drag symbol. Click and drag the item to the desired position.

8. Click Apply .

9. In the **Name** field, enter a name for the analysis and click Apply .

Analysis items

Analysis items form dimensions that can be used as a limitation or chart in an analysis. Specific restrictions apply for the use of analysis items as a limitation. The following table shows all available analysis items and their options for use. Click on an analysis item in the table to read further information on its use and configuration.

Analysis item	Description	Constraint	Chart
Recipient list	Constrains recipients to one or more recipient lists or analyzes recipients sorted according to recipient lists.	✓	✓
Recipient list field	Constrains recipients to a recipient list with a specific value or analyzes recipients sorted according to the values of a recipient list field.	✓	✓
Target group	Constrains recipients to one or more target groups or analyzes recipients sorted according to target groups.	✓	✓

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Analysis item	Description	Constraint	Chart
	Target groups must be previously created in the function Target groups.		
Monetary value	Analyzes recipients sorted according to sales figures within the past 12 months.	✘	✓
Last action	Analyzes recipients sorted according to the time period of their last action (purchase, product view, abandoned shopping cart) within the last 12 months.	✘	✓
Frequency	Analyzes recipients sorted according to the frequency of an action (purchase, product view, abandoned shopping cart) within the last 12 months.	✘	✓

Limitations

To constrain the recipients included in an analysis, you can make limitations in the analysis according to the following criteria:

- **Recipient lists**: Select one or more recipient lists that you would like to include in the analysis.
- **Recipient list fields**: Select a recipient list field and a value range to include only recipients with these attributes in the analysis.
- **Target groups**: Select one or more target groups to constrain the analysis to recipients from these target groups.

If you do not make any limitations, then all active recipients of your client will be taken into account for the computation of the analysis. You can deactivate selected limitations later in the detail view of an analysis.

Charts

A analysis includes one or more charts, each of which you can configure further. Three chart types are available:

- **Pie chart**: Each piece of the pie represents one recipient segment for a period, a frequency or a sales volume. Click on a piece of the pie to constrain the selection to this segment.

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- **Line chart**: Each point of the line represents one recipient segment for a period, a frequency or a sales volume. Click on a point to constrain the selection to this segment.
- **Bar chart**: Each bar represents one recipient segment for a period, a frequency or a sales volume. Click on a bar to constrain the selection to this segment.

Live Analytics analysis items

A **limitation** limits the data to be analyzed with the aid of an analysis item. You can add or remove limitations in running analyses. You can also create analyses without limitations.

In a **chart**, the value range of an analysis item is displayed segmented according to the selected dimension. The segmentation can be carried out according to time, frequency, sales volume, grouping or defined values.

To use an analysis item, drag it from the left action area to the areas **Limitations** and **Charts**.

Configure the analysis items as a limitation or chart as described below:

> The analysis items **Monetary value**, **Last action** and **Frequency** can only be used in charts.

Recipient list

Limitation

1. Drag the analysis item from the left action area to the **Limitations** area.
2. Enter a distinct name for the limitation, if necessary.

> If you are using multiple analysis items of the same type, we recommend entering a separate name for each individual one to better differentiate between them.

3. In the list, select the desired recipient list(s).
4. Click Close.

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Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter a distinct name for the chart, if necessary.

   If you are using multiple analysis items of the same type, we recommend entering a separate name for each individual one to better differentiate between them.

3. In the list, select the desired recipient list(s).

   It is only if you enter multiple recipient lists here, then you will receive a segmented evaluation in the chart.

4. Click Close.
5. Move the pointer over the added analysis item and click the desired chart symbol: .

   You can change the chart type at any time, even in running analyses.

Recipient list field

Limitation

1. Drag the analysis item from the left action area to the **Limitations** area.
2. Enter a distinct name for the limitation, if necessary.

   If you are using multiple analysis items of the same type, we recommend entering a separate name for each individual one to better differentiate between them.

3. In the list, select the desired recipient list field (e.g., country, age, modified). Depending on the file type, you can now configure discrete values, value ranges or intervals:
   - Text fields: In the box below, enter a value that you would like to use as the filter for the selected recipient list field, e.g., "France". The value must be entered precisely as it is specified in the recipient list (including capitalization). If you would like to filter the selected

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recipient list field by multiple filters, click + and enter another value. Repeat this step for all values that you would like to use as filters.

You can enter a maximum of ten values per chart.

- Numeric fields: In the list, select whether you would like a multiple selection, an interval or a threshold value to be displayed. If you have selected the **Multiple values can be selected** option, proceed as described above under "Text fields". If you have selected **Interval** or **Threshold** option, in the **Unit** field, enter a unit (e.g., years) and a lower or upper limit in the following fields. If you define a threshold value, also select whether you would like to filter values above or below the threshold value.
- Date fields: In the list, select a date field (e.g., modified) according to which you would like to segment the evaluation. Select the time interval later in the detail view of the analysis.

4. Click Close.

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter a distinct name for the chart, if necessary. If you are using multiple analysis items of the same type, we recommend entering a separate name for each individual one to better differentiate between them.
3. In the list, select the desired recipient list field e.g., country, age, modified. Depending on the file type, you can now configure discrete values, value ranges or intervals:
   - Text fields: In the box below, enter a value that you would like to use as the filter for the selected recipient list field, e.g., "France". The value must be entered precisely as it is specified in the recipient list (including capitalization). If you would like to filter the selected recipient list field by multiple filters, click + and enter another value. Repeat this step for all values that you would like to use as filters.

Notes

- You can enter a maximum of ten values per chart.
- It is only if you enter multiple values here then you will receive a segmented evaluation in the chart.

   - Numeric fields: Define the value ranges (intervals) that you would like to display in the chart, starting with the smallest segment. In the box after **Values lesser than or equal to**, enter a numerical value, e.g.,10. Then click + and add the next higher value range, e.g.

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20, 50, 100, 150, ... Repeat this step until you have defined all of the desired value ranges.

Notes

- You can define a maximum of ten values ranges per chart.
- If you enter multiple value ranges here, then you will receive a segmented evaluation in the chart.

- Date fields: In the **Reporting period** list, select an evaluation period for the data. within the last 7 days, within the last 8 weeks, within the last 12 months or within the last 10 years. Optionally, you can also display values outside of the selected evaluation period by selecting the **Show values beyond the reporting period** check box. In the chart, an additional segment for all previous events and an additional segment for all recipients without a corresponding event (**Remainders**) will be displayed.

  Example: If you selected the reporting period **the last 12 months** for the recipient list field "Last changed", with activated **Show values beyond the reporting period** option, 14 segments will be displayed in the diagram; one each for the last 12 months, another for all recipients whose datasets last changed more than 12 months ago as well as for all recipients whose datasets have not changed since being created.

4. Click Close.
5. Move the pointer over the added analysis item and click the desired chart symbol: .

You can change the chart type at any time, even in running analyses.

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Target group

Limitation

1. Drag the analysis item from the left action area to the **Limitations** area.
2. Enter a distinct name for the limitation, if necessary.

   If you are using multiple analysis items of the same type, we recommend entering a separate name for each individual one to better differentiate between them.

3. In the list, select the desired target group(s).
4. Click Close.

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter a distinct name for the chart, if necessary.

   If you are using multiple analysis items of the same type, we recommend entering a separate name for each individual one to better differentiate between them.

3. In the list, select the desired target group(s).

   It is only if you enter multiple target groups here then you will receive a segmented evaluation in the chart.

4. Click Close.
5. Move the pointer over the added analysis item and click the desired chart symbol: .

   You can change the chart type at any time, even in running analyses.

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Monetary value

Limitation

This item cannot be used as a limitation.

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter a distinct name for the chart, if necessary.

> If you are using multiple analysis items of the same type, we recommend entering a separate name for each individual one to better differentiate between them.

3. If you are using multiple post click services, select a post click service in the list below it. If you are only using one post click service then this list is not displayed.
4. In the **Revenue field** list, select the post click value that tracks sales. The name of this value can be different depending on the post click service and configuration, e.g., revenue, sales, and so on.
5. Define the value ranges (intervals) that you would like to display in the chart, starting with the smallest value. In the box after **Values less than or equal to**, enter a numerical value, e.g., 10. Then click + and add the next higher value range, e.g., 20, 50, 100, 150, ... Repeat this step until you have defined all of the desired value ranges.

> **Notes**
>
> - You can define a maximum of ten values ranges per chart.
> - If you enter multiple value ranges here, then you will receive a segmented evaluation in the chart.

6. Click Close.
7. Move the pointer over the added analysis item and click the desired chart symbol: .

> You can change the chart type at any time, even in running analyses.

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Last action

Limitation

This item cannot be used as a limitation.

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter a distinct name for the chart, if necessary.

   If you are using multiple analysis items of the same type, we recommend entering a separate name for each individual one to better differentiate between them.

3. If you are using multiple post click services, in the drop-down list, select a post click service . If you are only using one post click service then this list is not displayed.
4. Select the desired period in the **Reporting period** list.
5. Optionally, you can also display values outside of the selected evaluation period by activating the control box **Show values beyond the reporting period**. An additional segment with all recipients whose most recent action took place further in the past than the selected period of time and a segment with all recipients that have not performed any action at all (**Remainders**) will then be displayed in the diagram.

   Example: If you have selected the evaluation period within the last 7 days, then for the activated option **Show values beyond the reporting period**, nine segments will be displayed in the diagram; one each for the last 7 days, another for all actions taken more than 7 days ago as well as a segment with all recipients who have not performed any action at all (**Remainders**).
6. Click Close.
7. Move the pointer over the added analysis item and click the desired chart symbol: .

   You can change the chart type at any time, even in running analyses.

Frequency

Limitation

This item cannot be used as a limitation.

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Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter a distinct name for the chart, if necessary. If you are using multiple analysis items of the same type, we recommend entering a separate name for each individual one to better differentiate between them.
3. If you are using multiple post click services, in the drop-down list, select a post click service. If you are only using one post click service, this list is not displayed.
4. Define the value ranges (number of actions) that you would like to display in the chart, starting with the smallest segment, e.g., 0. Then click + and add the next higher value range, e.g., 2, 5, 10, ... Repeat this step until you have defined all of the desired value ranges.

Notes

- You can define a maximum of ten values ranges per chart.
- If you enter multiple value ranges here, then you will receive a segmented evaluation in the chart.

5. Click Close.
6. Move the pointer over the added analysis item and click the desired chart symbol: .

You can change the chart type at any time, even in running analyses.

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Live Analytics detail view

The detail view shows limitations selected in the analysis as well as the recipient segments as a chart. In the upper right corner of the window, you will first see the accumulated total number of recipients of all segments of this analysis and the analysis parameters. Here, you will also find the button for saving the selected segment or the selected segments as a target group.

Display of recipients

In the left column, at the very top in each detail view of an analysis, there is the **Show** drop-down list. Here, you can choose between two display options:

- **Potential recipients**: This option is the default selection. It shows all potential recipients of the selected segments, i.e., all recipients from the recipient lists that correspond to the defined criteria. If you change the limitations of an analysis or select individual segments, the number of potential recipients will also be adjusted in real time.

  This number can also include recipients that do not currently receive any mailings because they unsubscribed from the newsletter, exceeded the bounce limit or are blacklisted.

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- **Contacted recipients**: This option shows you all recipients that are included in the current selection and have already received at least one mailing.

  This does not necessarily mean that a campaign has already been sent with the segment shown in the analysis. It merely means that recipients have already been addressed using the same recipient list(s) and target group(s) as in the current analysis.

Change limitations

The selected limitations are displayed in the left column. Refine or expand the displayed analysis by activating or deactivating limitations:

- Entire limitation: To exclude the entire limitation, clear the control box to the left of the name.
- Individual segments of a limitation: To exclude a segment from an analysis, clear the check box to the left of the segment.
- Interval or threshold value for numeric values: To adjust the limitation interval or threshold value, move the slider bar for an interval or threshold value limitation.
- Time interval for date fields: To set or adjust the time interval, click the left data field and enter a starting date using the calendar selection. Then click the right date field and enter an end date using the calendar selection.

Notes

- If you select some limitations (not all), the number of potential recipients in an analysis will decrease or remain the same.
- If the number of potential recipients does not change after you selected a limitation, then this means that this limitation is not relevant for the analysis.
- If you select all limitations, then the number of potential recipients will increase because now all recipients from your client are being taken into account.

Ad-hoc segmentation

To receive the selected recipient segment, click a bar, point or slice of the pie in a chart. The display of analysis data in the upper right will change and now display the potential recipients and contacted recipients in the selected segment. If you have created multiple charts in an analysis, then the display will change in these charts, too. Only recipients from the segment selected in the first chart will still be displayed there.

You can now refine the selection of recipients by selecting an additional segment in these respective charts. After each selection the display of the other charts will adjust to the refined selection.

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The order in which you make the selection does not matter. You can start with any chart and then select a segment in the other charts.

A recipient segment is formed from an RFM analysis in the example:

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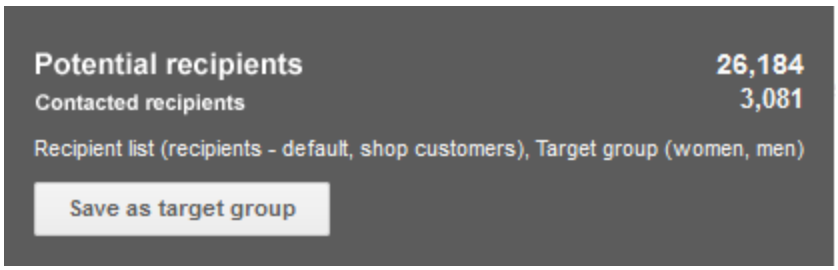
1. First, all recipients are selected whose most recent action (purchase, product view, abandoned shopping cart) took place in the last 6 weeks.
2. In the next step, these recipients are further limited to recipients who have performed one or two actions in the last 12 months. Both purchases as well as product views and abandoned shopping carts are evaluated here, too.
3. In the final step, these recipients are limited to those who have had purchased for more than 150 Euro in the last 12 months.

Save as a target group

After you have selected the desired recipient segment you can save this segment as a target group in a few clicks to address these recipients in a campaign.



To save a segment as a target group, perform the following steps:

→ 1. Move the cursor over the gray field in the upper right corner in which the analysis data is displayed.

✔ The field will thereby become active and highlighted.

> If a recipient is included in multiple categories, the potential recipients displayed in Live Analytics may differ from the actual number of recipients. If you would like to calculate the exact number of potential recipients, use the analysis feature in the **Create target group** window (see also Target group analysis).

→ 2. Click Save as target group .

✔ The **Create target group** window opens.

→ 3. In the **Target group definition** area, in the **Client** list, select the client in which you would like to create the target group.

→ 4. Click Properties .

→ 5. Optionally, select a folder in which you would like to save this target group.

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6. The name of the target group will be automatically generated according to the scheme "Created from [analysis title] on [date] at [time]". If you would like to give it a distinct name, delete this and enter the desired name.
7. Optionally, enter a description of the target group.
8. Click Create.

You can now select the target group in a regular campaign (in the menu item **Smart Campaigns**) or in an automated campaign (in the menu item **Marketing Automation**) and create a campaign for these recipients.

Pre-check for deliverability

This innovative module[1] enables you to automatically test whether your mailing will arrive at the 20 most important providers and free mail systems, even before sending it off. In addition, screenshots are created for the largest providers that show you how your mailing will look to its recipients.

The reason we offer this option is that more and more providers are employing spam filters to protect their users from undesired advertising. The more restrictive the filters are, the more they unnecessarily block serious and desired marketing emails.

Episerver addresses this problem with several coordinated strategies. We maintain constant contact with all of the major providers and free mail systems to guarantee that the IP addresses of our mail servers are included on the lists of serious senders (white lists). These efforts are bolstered by our membership in the Certified Senders Alliance (CSA), the first nationwide German white list project.

A refined monitoring system makes sure that our administrators are informed in real time of any problems in delivery. In many cases they are able to take appropriate measures, even during the sending of a particular mailing.

As a customer, you may also be active in assuring the highest rates of delivery by using the **Pre-check for deliverability** module. The best time to do this is after you have created a mailing and before you start the mailing.

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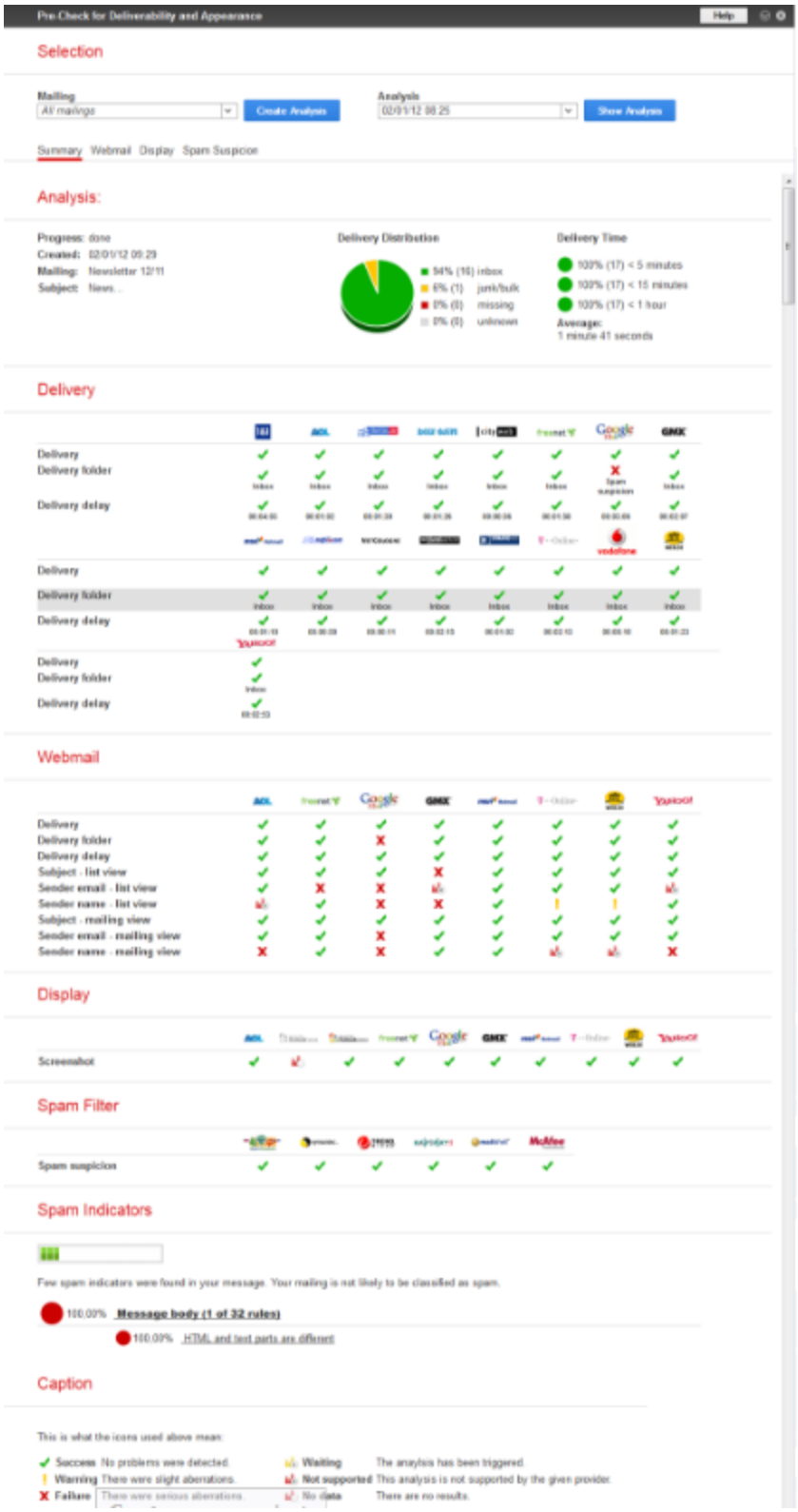

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[1] This feature is only available in Germany.

Execute and display pre-check

To create a pre-check[1], perform the following steps:

1. Open the start menu and, under **Analytics**, click **Pre-check for deliverability**.

✔ The **Pre-Check for Deliverability and Appearance** window opens.

2. In the **Mailing** list, click the mailing to be tested.
3. Click OK.
4. Click Create analysis.

✔ The **Create Analysis** window opens.

5. Specify what needs to be analyzed by selecting or clearing the corresponding check boxes next to the following categories:
   - **Webmail** validates the delivery and other formal criteria your mailing must match to be delivered to the inbox of the most common ISP's.
   - **Display** creates screenshots of your mailing from email accounts at the providers listed above. This helps you to detect incorrect font and formatting output.
   - **Spam suspicion** checks your mailing with over a hundred spam filter rules used by the most common providers and by spam protection software.
6. In the **Description** box, enter a short description of the analysis. This can be helpful if you change a mailing several times and require a report after each change. The description (e.g. "Third run after abbreviating subject") enables you to track the effectiveness of each modification.
7. In the **Recipient list** list, click a recipient list and then, in the **Recipient** area, click a recipient. The recipient data is only used for personalization purposes. The selected recipient will not receive an email.
8. Click Start analysis.

Conducting a complete analysis requires some time (at least 15 minutes).

✔ The results are shown in the **Details** area. The display window is actualized frequently, so that always the latest results are shown.

To display a pre-check, perform the following steps:

1. Open the start menu and, under **Analytics**, click **Pre-check for deliverability**.

✔ The **Pre-Check for Deliverability and Appearance** window opens.

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→ 2. In the **Analysis** list, click an existing or the current analysis. In this list, you can see the progress and creation date of each analysis.

→ 3. Click OK and then Show analysis.

✔ The analysis shows the following tabs:

- Summary
- Webmail
- Display
- Spam Suspicion

Summary

The **Summary** tab shows you the most important results in one overview.

- **Analysis**: Here you will find general data such as the status and description of the report.
- **Delivery distribution**: This pie chart shows you how the distribution is spread amongst the 20 tested providers. Do the mails make it to the inbox or land in the spam folder; were they delivered at all; has the status been determined yet?
- **Delivery time**: Provides information about the delivery times of test mails. Details include average time, percentage of mails delivered in less than five minutes, less than 15 minutes, and less than an hour.
- **Delivery**: Episerver maintains test accounts with the 20 most important providers and free mail systems. As soon as you start a report, your mailing is automatically sent to these addresses. Then Episerver Campaign shows you whether the attempt was successful, in which folders the mail arrived, and how long it took to deliver the mail. If you see a gray gear symbol next to a provider, the results have not yet been determined.
- **Webmail**: This is a preview on the **Webmail** tab that provides further details about how the mails were processed by the most important providers.
- **Display**: Here you see, for which email clients and email providers a screenshot is available. Check the screenshot in the **Display** tab to see if your mailing is displayed correctly.
- **Spam filter**: This is a preview on the **Spam suspicion** tab where you can read whether commonly used spam filter rules have identified your mailing.

Webmail

As mentioned above, the most important of the 20 providers analyzed are tested using additional formal criteria such as the clipping of subject lines or sender information. The results can be found on this tab. On the left side you can select which provider you want to see the results for. These are then shown on the right side.

First you will be informed whether the test mail arrived, in which folder it landed, and how long it took to deliver the mail. Under this you will see the results of testing for various formal criteria. It will be checked to see whether the subject, the sender name, and the sender email address were displayed

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completely. In case any parts were cut, Episerver Campaign shows you how many characters were clipped and what the changed text looks like. This check is also made for **Message list** (e.g., inbox folder) and **Details** (meaning a display of the entire mail).

This module helps you to identify formal shortcomings in your mailing. For example, if you discover that several providers cut off your subject line, you should consider editing the mailing and restarting the report.

Display

Episerver Campaign automatically creates screenshots after sending a test mail that show you how your recipients will see the mails in the largest free mail systems and in Microsoft Outlook , the most widely distributed email client. Select the desired provider from the left side. You can then select the screen resolution for the screenshot on the right side. This allows you to see how recipients with various screen resolutions will be viewing your mailing.

The first of these two links (e.g., **800x600**) shows a smaller preview, while clicking **Original** displays the screenshot in its actual size. The first three links show a fixed resolution so that you can see how much of your mailing is immediately viewable without scrolling. Links 4 to 6 use the same resolution but have no lower cut-off, which allows you to check the display of the entire email.

In general, this module should help you recognize irregularities in the display of your mailings by particular providers. If you notice, for example, that your links are displayed by web.de in red instead of blue, this could be a reason to check the HTML code of your mailing. If this is true, you should edit your mailing and restart the report.

Spam Suspicion

To address the fact that most mailing lists consist of more than just free mail addresses, we created the **Possible Spam** module, which checks your mailing using more than 700 commonly used spam filter rules. On this basis, Episerver Campaign determines the specific spam indicator for your mailing. The fewer bars the indicator graphic has, the more certain you can be that your mailing will safely pass through the spam filters on your computer or in the companies of your recipients. However, if more bars appear and you find yourself in the orange or red range, it might make sense to edit the content of your mailing.

For this purpose, Episerver Campaign shows you which spam filter rules came into play. The rules are divided into nine main categories. A pie chart on the far left side next to the name of the corresponding category displays the percentage of this category's involvement in the results of the spam check. The individual rules within a category function in a similar way. Here the pie chart shows how much this rule plays a part in the total value of the corresponding category. Be aware that there is not an automatically negative effect on the delivery rate of your mailings if a few rules are affected. What's decisive is the overall spam suspicion. Many rules are harmless in themselves, as spam filters become active only after many indicators are recognized.

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In addition, Episerver Campaign tests the most important spam filter software that many Internet users have installed on their computers. This includes software from Kaspersky, Trend Micro and McAfee. A green symbol below the corresponding manufacturer logo means that the mailing has passed the test—a red symbol means the filter identified your mailing as spam.

[1] This feature is only available in Germany.

Post click tracking

Post click tracking is a powerful tool to analyze actions of email recipients on your website. It allows you to know, for example, whether a customer has placed an order, watched a product or at which point the customer has cancelled an order.

To integrate post click tracking and email marketing, it is necessary that every action a visitor performs on a website can be assigned to a recipient (i.e., an email address). Only then you can use the collected data for your email marketing campaigns. The post click tracking and the target group module include the following functions:

- **Date and time range selection**: You can configure post click filters in the target group module so that only post clicks that have been generated in a defined time range or at a specific date are matched.
- **Autocomplete for product names etc.**: The input fields for product names or similar items are designed as drop-down menus or provide an autocomplete function. This makes work much more convenient and avoids incorrect entries when creating target groups.
- **Mailing-independent customer actions**: It is now possible to import post click data that are not assigned to a mailing, but for which an email address is available. If, for example, a new customer orders for the first time in your online shop and indicates his/her email address, order details are available as post clicks in the target group module as soon as this customer registers for the newsletter.
- **Universal interface for integrating web analytics software**: Episerver Campaign supports a universal interface that allows you to integrate almost any web analytics software in a unidirectional way, for example Google Analytics or eTracker . For the web analytics solutions Adobe Analytics and Webtrekk, even a more powerful bi-directional interface is available.

Setup

In your Episerver Campaign client

Post click tracking is set up together with your client configuration. One or more post click services (this is either the proprietary post click tracking or the web analytics software you are using) can be configured in one client. For each service, the desired categories to be tracked are defined. Typical categories are "purchased products", "viewed product", "product group" or numeric values like "product

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price" or "revenue". Using these categories, you can define target groups or evaluate the success of your mailings.

On your website

The proprietary post click tracking uses tracking pixels. A tracking pixel is a transparent image file (usually a GIF file) of one pixel width and height, which is loaded from a server when a customer clicks on a link. The customer will not notice that the file is loaded. When the tracking pixel is loaded, the URL of the tracking pixel and parameters attached to this URL are submitted to the post click tracking server. These parameters represent the categories that have been defined and, additionally, the mailing ID (except for customer actions, where no mailing is necessary) and the recipient ID, which is usually the email address. The tracking pixel must be integrated on an appropriate page, for example on the page that is shown to the customer after he/she placed an order ("Thank you for your order."). The post click tracking server stores the data in a database so that they are available in Episerver Campaign. Simultaneously, the time of the click is detected and stored.

Basically, one tracking pixel can transmit up to 19 values (nine string values and ten numeric values). One parameter is reserved as an identifier. This identifier ensures that each post click is only tracked once. If a page is reloaded by the customer, the identifier ensures that actions are not tracked on several occasions.

SSL certificate

If the site where the tracking pixel is implemented uses a SSL ctificate, the post click tracking needs a SSL certificate as well.

To order and store the certificate on our server, we need the following from you:

- **A domain**: The domain name (e.g., example.com) for which the certificate will be issued.
- **A contact person from your IT department**: Send us the following data: first name, last name, company name, address, CIP code, phone number, email address and fax address (if there is one).
- **A contact person for organizational issues**: Send us the following data: first name, last name, company name, address, CIP code, phone number, email address and fax address (if there is one).
- **An administrative email address**: This email address will be used for the administration of the certificate and must have the same domain part as the domain the certificate is issued for. (So, if your domain is *newsletter.example.com*, the email address must be one of the following. *admin@example.com*, *administrator@example.com*, *hostmaster@example.com*, *webmaster@example.com*). Note that only the local parts *admin*, *administrator*, *hostmaster* or *webmaster* are allowed.

Technical implementation

A tracking pixel consists basically of an image URL, which is added to your website:

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```
<img src="{url}" width="1" height="1" alt="" border="0">
```

The placeholder `{url}` must be replaced by the actual URL, to which the submitted parameters are attached (the example URL *news.example.com* must be replaced by your URL):

Example:

```
http://news.example.com/pc?mg=1234567890&bi=0&service=default
       &fvalue1=[product ID]
       &fvalue2=[number of items]
       &fvalue3=[price]
       &gvalue1=[category1]
       &gvalue10=[order number+product ID]
```

- The parameter `mg` (mailing group) submits the ID of your Episerver Campaign client. If you do not know your client ID, ask customer support.
- The parameter `bi` (browser identifier) is set to 0 by default. The user agent of the browser is used. If you have a proprietary implementation that identifies the user agent, you can submit the value with this parameter.
- The parameter `service` identifies the post click service to be used. In this example, the proprietary Episerver Campaign post click tracking (`default`) is used.
- The parameters `fvalue1` to fvalue10 can be used to submit ten different numeric values. The names in brackets are only examples and may vary.
- The parameters `gvalue1` to gvalue9 can be used to submit categories (string values).
- The parameter `gvalue10` is reserved for the identifier (e.g. shopping cart ID) which ensures that post clicks are submitted only once when the content is reloaded. If several tracking pixels are used for each product, this identifier must contain the product ID as well, otherwise the tracking pixels would have the same ID.

The identifier is an indispensable parameter that assures the creation of unique post click data. Missing or incorrect identifiers may cause data loss or incorrect sales figures.

Use cases

One of the most common use cases is the tracking of the basic sales figures, such as revenue, number of bought items, order number and shopping cart ID. This can be done with a tracking pixel placed on the page that is shown to the customer after he/she placed an order. Only one tracking pixel is necessary. The URL of the tracking pixel, including the attached parameters, is as follows:

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```
=1461858149&b-
bi=0&service=default&fvalue1=20.0&fvalue2=3&fvalue3=8866442211&gvalue1=
mark.spencer@example.com&gvalue10=1234567890
```

- /pc?mg=1461858149&bi=0&service=default&fvalue1=20.0 **= Revenue**
- &fvalue2=3 **= Number of bought items**
- &fvalue3=8866442211 **= Order number**
- &gvalue1=hans.mustermann@example.com **= The customer's email address**
- &gvalue10=1234567890 **= Shopping cart ID**

To obtain more detailed data, it is possible to load a tracking pixel for each item bought by the customer. The URL used for the tracking pixel is identical for each tracking pixel, only the attached parameters are different for each item. With this setting, post click data for each item, like product ID, product name, price, etc. can be submitted. The tracking pixel URL is the same as in the example given above, an additional parameter that contains the product ID (fvalue) and/or the product name (gvalue) is submitted.

Working with post click data

Third party web analytics programs

To create reports and analyses with third party web analytics programs, use the web interface of the respective program. Read the user manual provided with the product to learn more about reporting options.

Analyze and monitor the success of mailing campaigns

You can analyze and represent post click data using the Episerver Campaign Deep Analytics (**Deep Analytics** menu item in the **Analytics** menu) by adding a post click measure to a report:

1. Create or edit a report template or an ad-hoc report. For more information, see Deep Analytics.
2. In the **Report data** tab, click + Add measure.. and then **Post click...**.
3. In the **Name** box, enter an arbitrary name for the post click measure.
4. If you are using more than one service (provider), select the one you want to use from the **Service** drop-down list.
5. In the **Value** drop-down list, select whether the measure you wish to create is a number, a sum or an average.
6. If you have selected **Sum** or **Average** in the previous step, select a post click value from the drop-down list. If you do not wish to filter this value further, the definition can be saved. If you have selected **Number** in the previous step, no filters can be added.

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7. To add filters, in the **Filter** area, click +.

8. In the **Category** drop-down list, click a post click value/category and select an operator.

The possible operators differ depending on whether the selected post click represents a number or a string value.

9. Enter a reference value to compare the post click value with.

10. Click the tick button.

11. To add further filters values, click + and repeat the previous steps.

12. Click Save.

✔ The newly created post click measure is now shown in the **Report data** tab.

13. Continue editing the report template/ad-hoc report–as described in the user manual–and then execute the report.

Example: Create the post click measure Men's fashion revenue

1. In the **Value** drop-down list, click **Sum** and then in the **of** drop-down list, click **Revenue**.

2. In the **Filter** area, click +.

3. In the **Category** drop-down list, click **Shop category** and select the **equals** operator.

4. Enter the reference value **Men's fashion**.

5. Click the tick button.

6. Click Save.

The example requires that a parameter with the shop category is passed in your tracking pixel.

Target groups with post click filters

To create a target group with a post click filter, perform the following steps:

1. Open the start menu and, under **Recipients**, click **Target groups**.

2. Click Create.

3. In the **Name** box, enter a name for the target group and in the **Target group** area, click +.

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4. In the second drop-down list, click **Action** and in following drop-down list, click **has created post click**.
5. If you are using more than one service (provider), select the one you want to use from the **Service** drop-down list.
6. If you want to consider only post clicks created from one or more mailings, select the mailing/s from the **Mailing** drop-down list. If no mailing is selected, all mailings and also actions that have not been created from a mailing (customer actions) are considered.
7. Select a date or time in the **Period** drop-down list to select only post clicks that have been created within a defined time range or at a certain date. All times entered as a number of days (e.g. "Exactly 30 days ago") are referring to the current day.
8. In the **Category** drop-down list, click a post click value/category and select an operator.
9. Enter a reference value to compare the post click value with.
10. Click the tick button.
11. To add further filters values, click + and repeat the previous steps.
12. Click Create.

Example: Create the target group "Buyers—Men's fashion"

To define a target group that contains all buyers of men's fashion of the first quarter of the year 2018, perform the following steps in the **Create target group** window:

1. In the **Name** box, enter `Buyers—Men's Fashion` and in the **Target group** area, click +.
2. In the second drop-down list, click **Action** and in following drop-down list, click **has created post click**.
3. In the **Period** drop-down list, click **From...until...** and select the period from 1 January 2018 to 31 March 2018.
4. In the **Category** drop-down list, click **Shop category** and select the **equals** operator.
5. Enter the reference value `Men's fashion`.
6. Click the tick button.
7. Click Create.

The example requires that a parameter with the shop category is passed in your tracking pixel.

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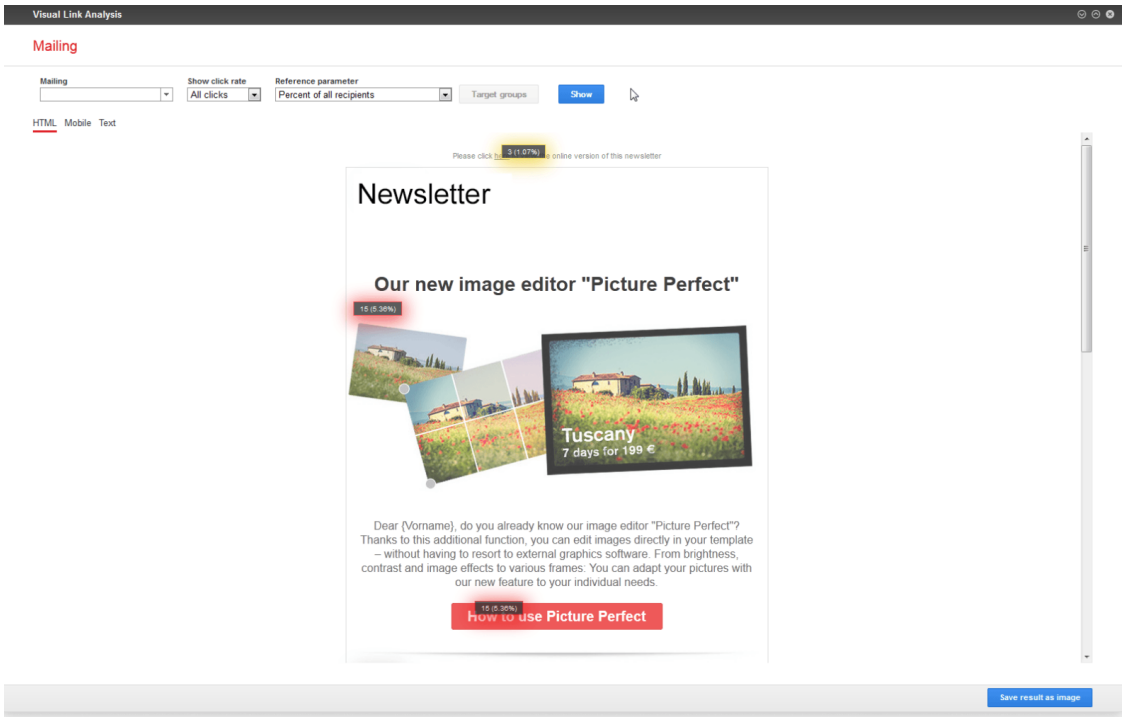
Visual link analysis



The visual link analysis shows you at one glance how often each link within a mailing has been clicked. The analysis data is displayed directly over a screenshot of the original mailing. It is very helpful to detect correlations that might not be obvious when you edit the mailing, e.g., if recipients click preferably on links in a certain area of the mailing.

To create a visual link analysis, perform the following steps:

1. Open the start menu and, under **Analytics**, click **Visual link analysis**.

✔ The **Visual link analysis** window opens.

2. Click the **Mailings** box and then the mailing you want to analyze.

3. In the **Show click rate** drop-down list, click the type of clicks you want to analyze:
   - **All clicks**: If you select all clicks, each click is counted, including multiple clicks from the same recipient.
   - **Unique clicks**: If you select unique clicks, multiple clicks from the same recipient on one URL are only counted once. If a recipient clicks on different links to the same URL (e.g., text and image), this is one unique click as well, since not the link itself, but the URL, to which it links, is decisive.

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Calculation of the unique click rate

The unique click rate for each link is calculated in relation to the total number of unique clicks on each link in the mailing. This differs from the unique click rate of the whole mailing, as given in the mailing report. In the visual link analysis, one recipient can generate as many unique clicks as there are links in the mailing (exactly one per link). The total number of unique clicks (i.e., the sum of all unique clicks on each link) is usually higher than the total number of unique clicks as given in the mailing reports, since some recipients will click various links in the mailing. The percentage of unique clicks for each link is calculated in relation to this number. Note that both values, unique clicks in the overall mailing report and unique clicks in the visual link analysis are not identical values, since they are calculated differently.

→ 4. In the **Reference parameter** list, click the reference value you want to use to display the attractiveness of the individual links:

- **Percent of all recipients**: Shows the clicks on a link in relation to all recipients of the mailing.
- **Percent of all (unique) clicks**: Shows the clicks on a link in relation to all (unique) clicks on all links of the mailing.
- **Percent of all recipients/(unique) clicks**: Shows the clicks on a link in relation to all (unique) clicks on all links in the mailing and in relation to all recipients of the mailing.

→ 5. If your client is set up for post click tracking, in the **Additional data** list, you can select the post click option. It shows the post click actions created from each link, e.g., the number of items bought. The data shown in this option depends on what kind of data is tracked with post click tracking.

→ 6. Click Show.

✔ The visual link analysis is started. This may take a few seconds.

→ 7. To show only the elements that are assigned to specific target groups, click Target groups, select one more target group and click Submit selection.

✔ In the background, a screenshot of the mailing is shown. Over each link, the respective numbers (clicks and percentages) are shown in a small box.

You can switch between the different versions of your mailings by clicking the appropriate tab (**HTML**, **Mobile** and **Text**). Optionally, you can save the result of the analysis by clicking Save result as image. The box also has a color indicator. White

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means, a link has not been clicked at all, while red means a link has been clicked very often. Yellow and orange indicate a low and medium click rate.

Multiple links with the same link target

Note that multiple links to the same URL, e.g., an image and a text link, are not analyzed separately. That is, over each link item to the same URL, the total number of clicks/unique clicks is shown. It is not possible to tell, for instance, whether recipients preferred to click an image or a text link to the same target URL.

Visual link analysis of post clicks

The visual link analysis feature allows you to see a graphical representation of post clicks. All numerical post click parameters can be configured (e.g., item price, item number or total price). The selected parameters are displayed as either a sum, average or quantity. This allows various analyses to be visualized, such as:

- Total revenue generated by a link
- Average revenue generated by a link
- Number of orders resulting from a link

This function is available as add-on for Episerver Campaign. If you want to use this function, contact customer support.

Attention analysis

The attention analysis is subject to extra charges.

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Test the usability of your mailings, templates or drafts before sending them out. The attention analysis gives you a graphic analysis, within seconds, that shows whether the crucial elements (logo, call-to-action, promotional offers) are placed where they should to immediately draw the viewer's attention.

→ To open the overview of all Attention analyses, open the start menu and, under **Analytics**, click **Attention analysis**.

✔ In the overview, you can see how many analyses you already created, and a list of already created and requested analyses.

New attention analysis

To analyze a screenshot, perform the following steps in the **Attention analysis** window:

→ 1. Click New analysis.

✔ The **New attention analysis** window opens.

→ 2. Click **Screenshot upload** and then Select.

→ 3. Click Browse... and select the screenshot from your local hard disk.

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→ 4. Optionally, enter a description of the analysis and click Preview.

→ 5. If you are satisfied with the screenshot shown in the preview, click Start analysis.

Image files must not exceed 5 MB.
The formats PNG, JPEG, BMP and GIF are supported.
The image will be scaled automatically. This may result in very small images, for instance if the original page orientation is an extreme portrait.

To analyze an existing mailing or landing page, perform the following steps in the **Attention analysis** window:

→ 1. Click New analysis.

✔ The **New attention analysis** window opens.

→ 2. Click **Mailing** and then Select.

→ 3. In the mailing overview, select the mailing you want to analyze. To analyze a landing page, you must also select the mailing with which it is associated.

→ 4. In the **Mailing part to analyze** area, in the list, select the mailing or the landing page. If you have not created any landing pages for your mailing, the mailing is the only option in this list.

→ 5. Optionally, enter a description of the analysis and click Preview.

→ 6. If you are satisfied with the screenshot shown in the preview, click Start analysis.

✔ After a few seconds, the analysis is available. You can select between the following modes:

- **Perception map**: This mode highlights those areas that the user perceives in the very first seconds. Important items and information that draw the user's attention to continue reading should appear in these areas.
- **Attention map**: In this mode, a heat-map displays the areas of your mailing that create most attention. This mode allows you to check whether your logo, contact etc. are properly placed.

You can also run an attention analysis when editing a mailing:

→ 1. In the upper menu bar of the **Edit** window, click Attention analysis.

✔ A screenshot of the mailing you are editing is taken.

→ 2. To submit the screenshot and request an analysis, click Start analysis.

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The attention analysis is based upon universal laws of perception. Some aspects though, such as the perception of an image from above left to below right, are cultural patterns and thus only applicable to occidental viewers.

Attention analyses guide

The first impression counts

Optimization of mailings to achieve higher conversion rates is a daily challenge in email marketing. The time a recipient spends looking at and reading an email newsletter, is only a few seconds. This time must be sufficient to arouse his interest, to communicate the crucial information and create a stimulus to click on a link. The path from the inbox to the "To payment" button in an online shop consists of many steps to be optimized. Each of them should be considered carefully to make email marketing an advanced and powerful marketing tool. The attention analysis is a revolutionary tool in email marketing. With its integration in Episerver Campaign, customers can now analyze and optimize what used to be a blind spot for marketers – the initial and unconscious attention a recipient pays to an email newsletter.

What is perceived in the first seconds after opening a mailing? Where does the recipient look first and which items attract his attention most? Before a recipient reads the text and looks at the images of an email, complex neuronal processes control the attention and predestine his later behavior. Whether a recipient finds an email interesting and continues reading, does not depend on the actual content alone, but also on the look & feel of an email, on perception paths and the eye-catching potential of its items. This is where Episerver Campaign attention analysis comes into play. It analyzes, based on a scientific model and mathematical algorithms, how a recipient perceives an email in the very first moments, which spots his eyes fixate on and which areas catch his attention.

Revolutionary testing

The Episerver Campaign attention analysis is based on the EyeQuant Software developed by WhiteMatter Labs. WhiteMatter Labs is a spin-off founded by Prof. Dr. Peter König, one of the leading European neuroscientist from the University of Osnabrueck. For the first time, the results of long-term fundamental research are available in marketing. Until this time, analyzing user behavior meant conducting expensive eye tracking studies with large sample sizes. With EyeQuant, real test persons are no longer necessary. Neuroscientific models allow forecasting of viewing patterns within seconds and at low costs. The attention analysis was specifically developed to analyze newsletters, websites and related items. The seamless integration in Episerver Campaign makes it possible to run attention analyses as an integral part of a continuous, iterative optimization process for mailing campaigns:

- Evaluation of different design drafts at the first stage
- Pre-test of templates, landing pages and micro sites
- Testing of special design elements

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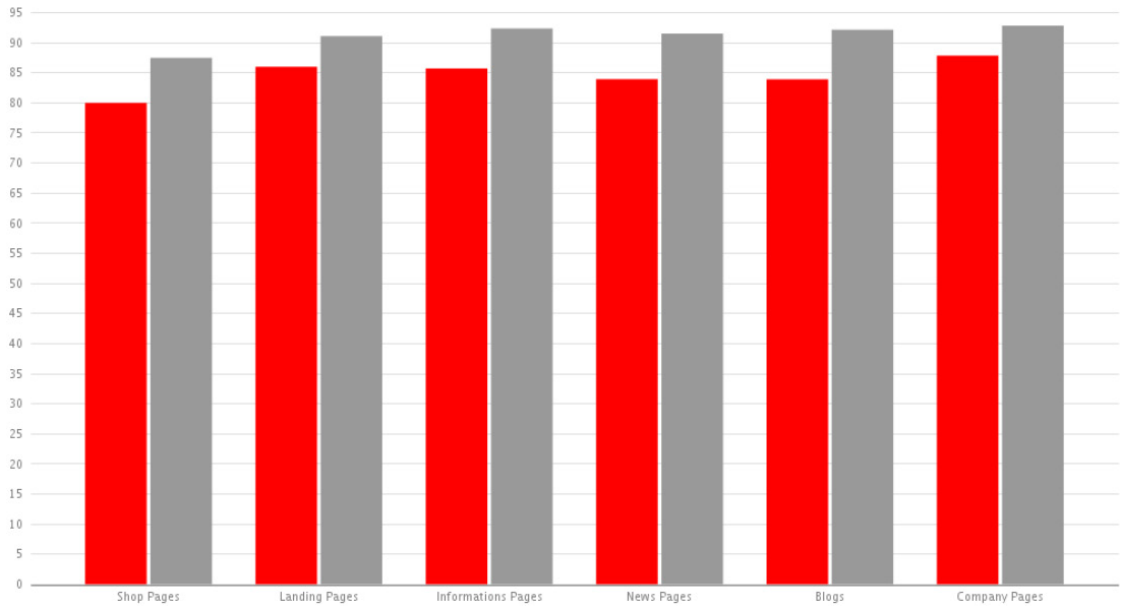
What exactly does attention analysis?

The attention analysis delivers a forecast of the first seconds of viewing a mailing. Like any image, an email, being opened, is scanned by the human eyes. During scanning, the focus rests several times on the so-called fixation points. Image information is processed subconsciously during these moments. The Episerver Campaign attention analysis is not a semantic analysis, i.e. it does not analyze the meaning of words, the content of images etc. It analyzes visual, physical stimuli and deduces, how much attention each item and area of the image receives. The result helps to optimize size, color, placement etc. of those items to make them more eye-catching. The attention analysis is applicable for mailings as well as landing pages. Each analysis consists of more than 50 image properties, e.g. colors, brightness, contrast, size, position, color saturation, outlines and textures. These data are processed by a computer designed model to forecast the viewing behavior. The model was designed using attention signatures of real test persons. WhiteMatter Labs has been developing and verifying this model constantly.

Validity

The model of attentional deployment has been developed based on the statistical evaluation of more than 15,000 tested images. The viewing behavior of more than 300 test persons has been analyzed to create attentional signatures and to calibrate the model. A comparative study with empirical eye tracking data on the predictive power has found a high correlation of both – empirical data and computed data. While eye tracking studies reached a predictive accuracy (i.e. correlation of forecast and effective eye movement) of approximately 90%, automatically created attention analyses reached about 85%.

Predictive power (in per cent): red = EyeQuant model, gray = Eye tracking study



New analysis

To analyze a screenshot, perform the following steps in the **Attention analysis** window:

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1. Click New analysis.
✔ The **New attention analysis** window opens.
2. Click **Screenshot upload** and then Select.
3. Click Browse... and select the screenshot from your local hard disk.
4. Optionally, enter a description of the analysis and click Preview.
5. If you are satisfied with the screenshot shown in the preview, click Start analysis.

Image files must not exceed 5 MB. The formats PNG, JPEG, BMP and GIF are supported. The image will be scaled automatically. This may result in very small images, for instance if the original page orientation is an extreme portrait.

To analyze an existing mailing or landing page, perform the following steps in the **Attention analysis** window:

1. Click New analysis.
✔ The **New attention analysis** window opens.
2. Click **Mailing** and then Select.
3. In the mailing overview, select the mailing you want to analyze. To analyze a landing page, you must also select the mailing, it is associated with.
4. In the **Mailing part to analyze** area, in the list, select the mailing or the landing page. If you have not created any landing pages for your mailing, the mailing is the only option in this list.
5. Optionally, enter a description of the analysis and click Preview.
6. If you are satisfied with the screenshot shown in the preview, click Start analysis.

You can as well run an attention analysis when editing a mailing:

1. In the upper menu bar of the Edit window, click Attention analysis.
✔ A screenshot of the mailing you are editing is taken.
2. To submit the screenshot and request an analysis, click Start analysis.

Analyses with only a few clicks

To display an already generated analysis, perform the following steps:

1. Open the start menu and, under **Analytics**, click **Attention analysis**.
✔ The overview displays all generated analyses.

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2. To view the result, click an analysis in the **Analyses** list, and then click either Perception map or Attention map .

Perception map

The first layer of the attention analysis shows, which areas gain most attention in the first moments of perception. These areas should contain logos, specially formatted product information etc. Small areas mean more focused attention, while larger areas indicate a more dispersed attention. Images with little contrast in color and brightness will probably disperse the initial attention more widely.

Attention map

The second layer analyzes the attentional potential of the elements in the overall context of the mailing. Red and yellow areas indicate a high attentional potential, while blue and turquoise areas indicate a low attentional potential. Items with red and blue parts have a high attentional potential, since they are perceived as one item. As said above, a high contrast between an item and the background leads to a more focused attention.

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Interpretation of results

The attention analysis gives you useful indicators on how to optimize your mailings or landing pages:

- Are the products you want to promote in the newsletter eye-catchers?
- Is the product information (description, image, price) properly placed and grouped?
- Are the calls-to-action integrated in the perception path, so that a viewer can follow them easily?

Note that too much attention might have a negative impact on the mailing performance:

- Less important items might be more eye-catching than other, more important items.
- The viewer might be distracted by too many items with a high attentional potential.
- Very eye-catching items might appear too blatant for certain recipients.

Optimization options

There are a couple of options to optimize the layout and graphic design of a newsletter. None of them requires magic, but follows the general rules of design and layout. In this paper, we would like to give you a few examples on how to optimize a newsletter.

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- Strong contrasts of fore- and background attract the attention. Contrasts can be achieved through brightness (black/white) as well as through colors.
- Complementary colors (e.g. red/green) create a higher contrast and more attention than colors that lie closer in the color space.
- Images are more eye-catching when the background is masked and uncolored (high figure-background contrast).
- The general attention path in the occident goes from the top left to the lower right. You can follow this pattern or break it up intentionally using an eye-catching item.
- One spot that gains high attention is situated in the left upper corner. Usually, logos etc. are placed here.
- A second area that gains particular attention lies between the mentioned above and the center. This area is often the point of entry for the viewer.
- Grouping eye-catching items with less eye-catching ones (relative positioning) can heighten the attention for all items. For example, to make an item more eye-catching, just place it close to an item that already receives a lot of attention.
- To heighten the attention for an item, it should be placed in a "calm" environment.
- Less is more. Few eye-catching items may be better than too many. The more eye-catching items you place in your newsletter, the more they compete against each other.

Optimization example

This sample newsletter, at first glance, is clearly structured and well-arranged. The title is eye-catching, but the attention analysis shows that only one of the three promoted products below receives some attention. The product price, although in red, is not focused on by the viewer:

Initial design: The analysis perception map shows a focus on the first product shown.

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This is an optimized version of the same newsletter. Some changes have been made: The price is now positioned closer and top-left to the product. Instead of the red font, an inverted font, similar to the title, is used. These changes cause a significant shift of attention:

Optimized: The perception is equally distributed on the three products – a focus is on the prices.

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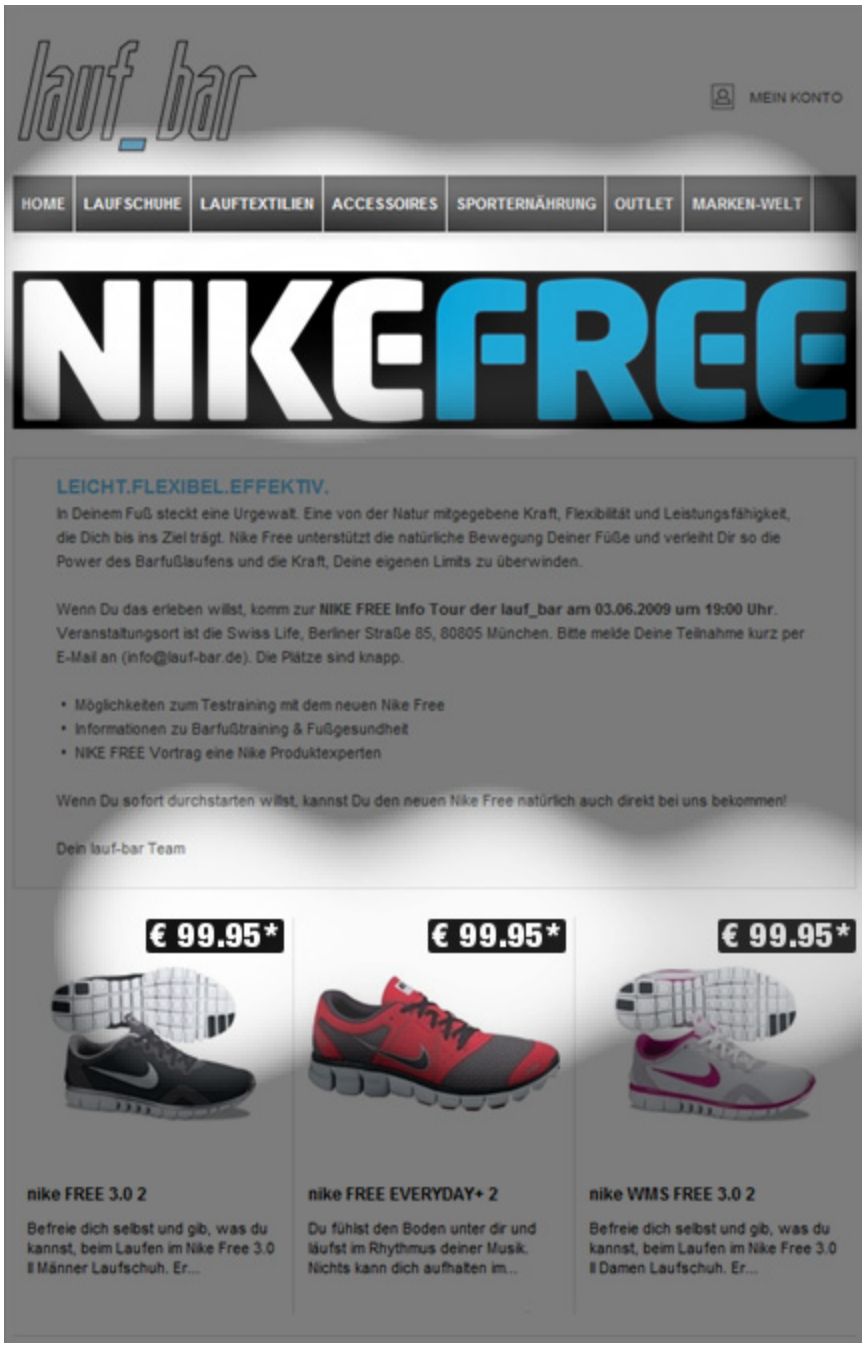

Activity overview

The activity overview shows all mailings for a defined period in a single clearly laid out screen. This enables you to obtain information relevant for the evaluation of your marketing activities – which customer dialogs you have sent, are currently sending and are about to send. Transactional emails and registration confirmations are also supported.

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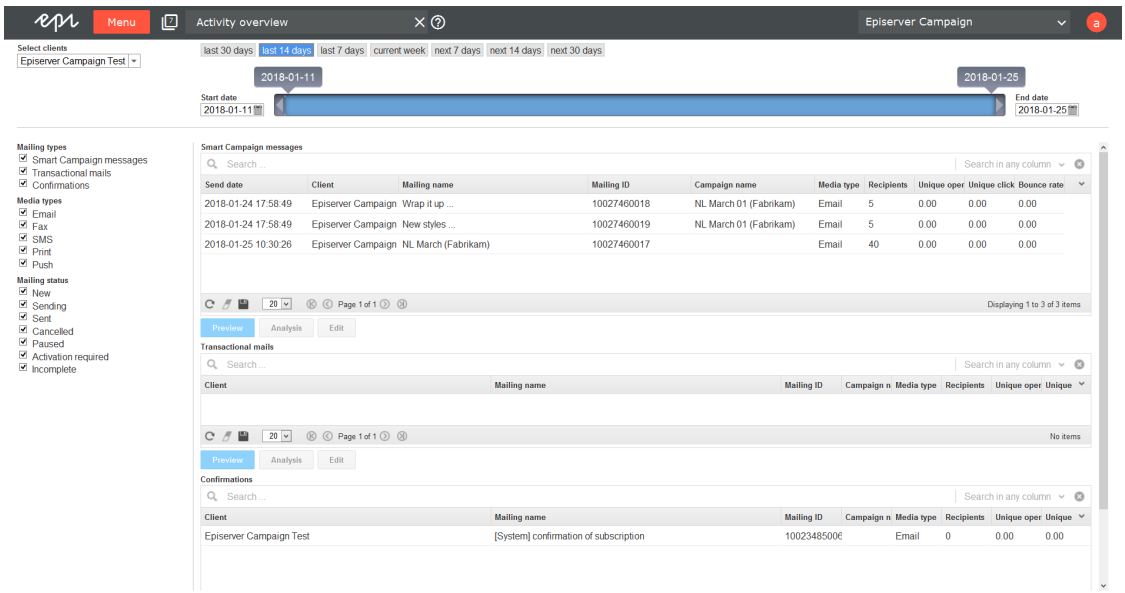
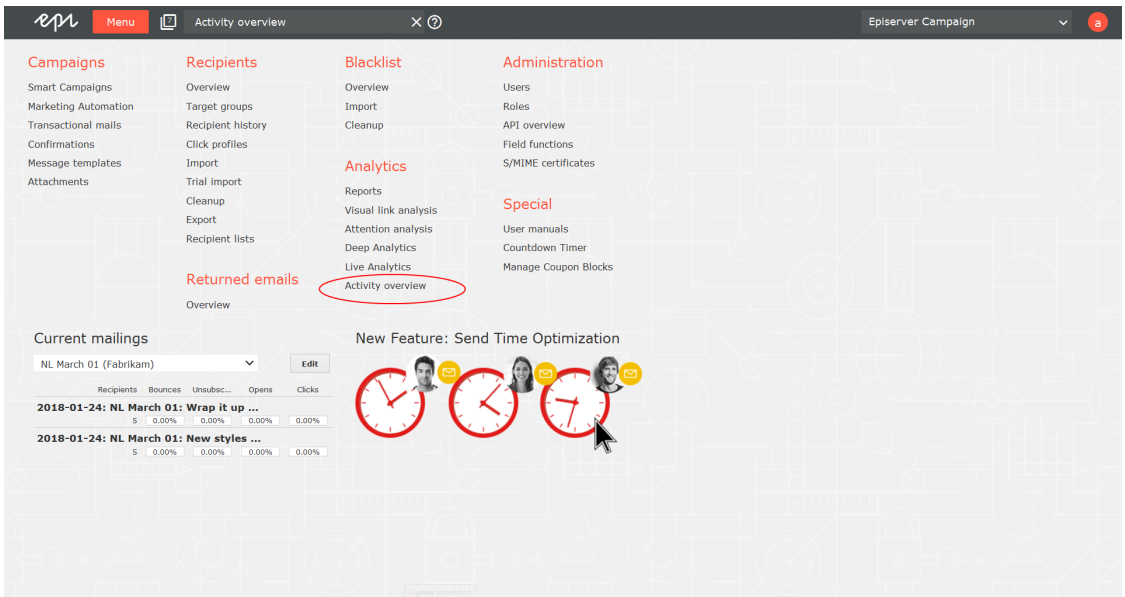
And: If your company has subsidiaries, branches or affiliate companies, using the activity overview you can plan, steer and control the campaigns of your branches and associated companies.



Set up the activity overview

➜ To set up the activity overview, contact customer support who will enable this feature.

✔ If the optional feature was enabled for you, the activity overview can be found in the start menu under **Analytics**.



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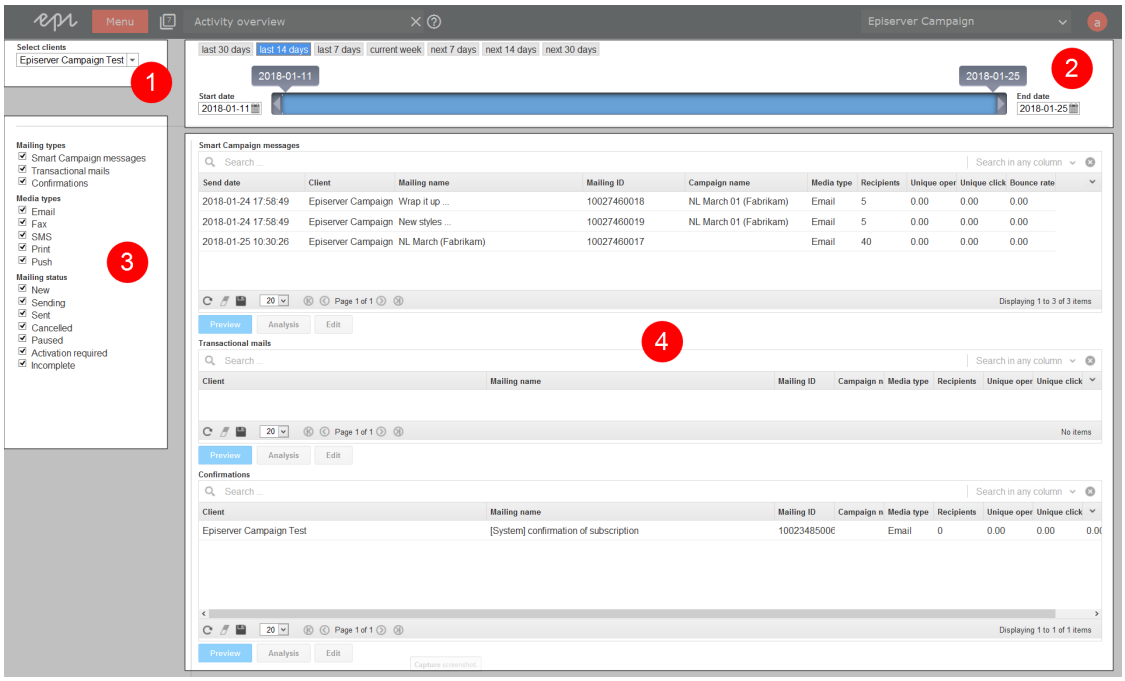
Layout of the activity overview



The activity overview display is divided into four areas:

- In area 1 select one or more clients for which you want to display the activity overview.
- In area 2 select the period for which you want to view the marketing activities.
- In area 3 you can filter mailings in the activity overview by mail type, media type and mailing status.
- In area 4 the activity overview will be displayed. Other features are also available to you in this area, such as showing a content preview of a selected mailing, opening a campaign analysis or switching to the edit window of a selected element.

In the following you will learn how to use the activity overview and apply settings in the specific areas.

Use the activity overview

To get information on your marketing activities using the activity overview, perform the following steps:

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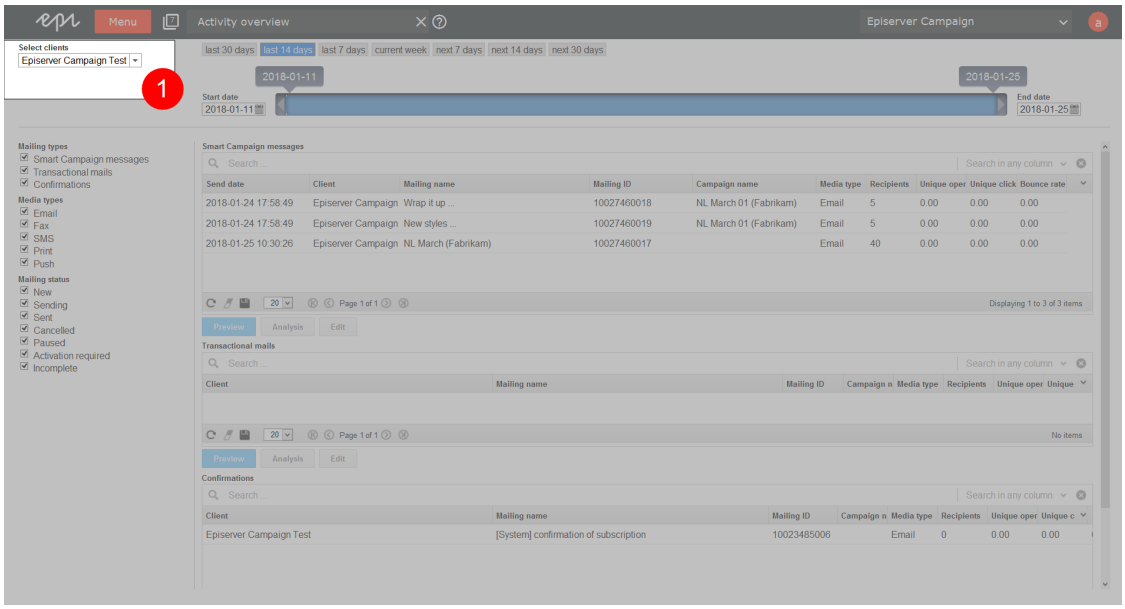
Area 1: Select client



...

1. Open the start menu and, under **Analytics**, click **Activity overview**.

✔ The **Activity overview** window opens.

2. In the **Select clients** list, select one or more clients for which you would like to display the activity overview.

The client you are logged in will be preselected. To stop analyzing this client, clear the corresponding check box.

If you would like to select all clients of your user account, select the check box on the upper left in the list's header.

✔ If you have selected one or more clients, the corresponding information for your marketing activities will be shown in the activity overview (in area 4). When you open the activity overview for the first time, the last 14 days are automatically preselected in area 2 as the period to display and in area 3 all check boxes under **Mailing types**, **Media types** and **Mailing status** are selected.

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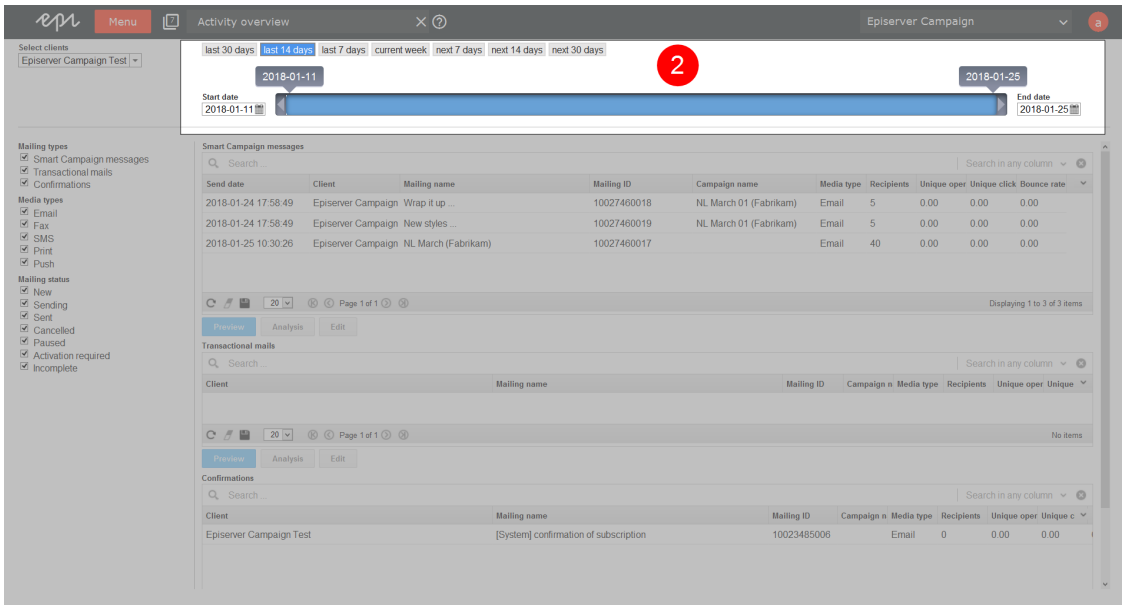
Area 2: Select period



To select the period for which to display your marketing activities in the activity overview, perform the following steps.

There are 3 ways to select the period:

→ 1. Click one of the buttons `last 30 days` , `last 14 days` , `last 7 days` , `current week` , `next 7 days` , `next 14 days` or `next 30 days` .

✔ When you click one of the buttons, the button's color changes from gray to blue, indicating that it has been activated.

→ 2. Alternatively, with the date selector, under **Start date** and **End date**, you can select a start date and an end date from the calendar that opens.

→ 3. You can also drag the date slide to the desired start date and end date.

✔ When you have set a period, the data displayed in the activity overview (in area 4) changes accordingly.

Entering a time period has no effect on the action data displayed (openings, clicks, bounces, subscription cancellations) nor on the number of recipients shown in the transactional email and registration confirmation overviews. The action data displayed and the number of recipients always represent the value for the entire time period in which a transactional email or registration confirmation is, or was, active.

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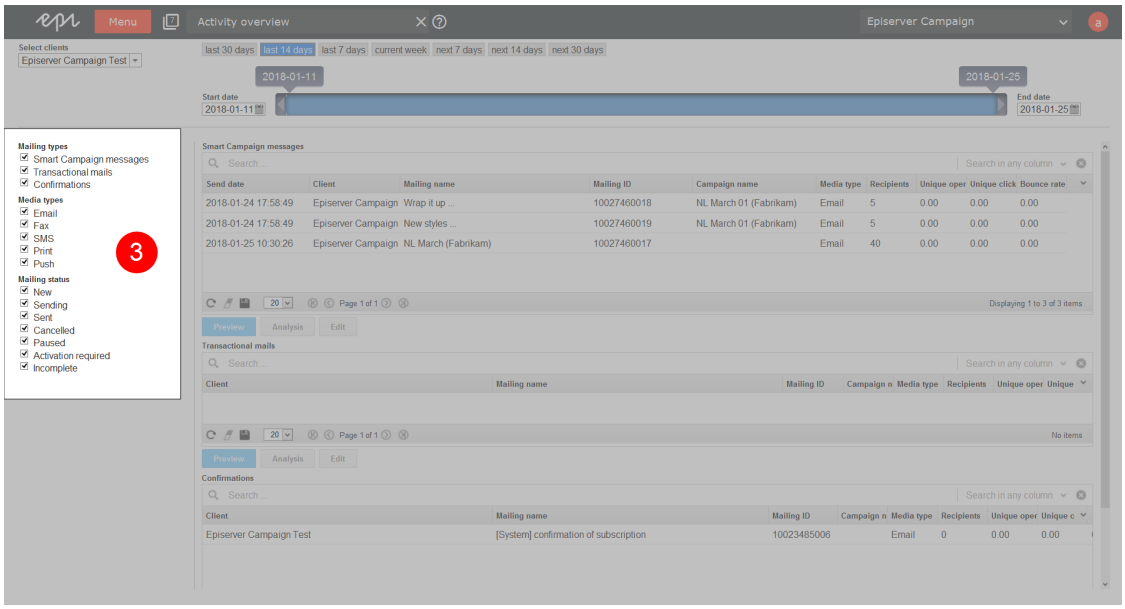
Area 3: Filter mailings



To filter the displayed mailings by mailing type, media type or mailing status, perform the following steps:

→ 1. Under **Mailing types**, select which mailings should be displayed. Select or clear the appropriate check box.

Transactional mails include among others all Marketing Automation mailings. If you wish to include mailings from Marketing Automation campaigns in your activity overview, select the check box next to **Transactional mails**.

✔ If you have selected one or several mailing types, the data displayed in the activity overview (in area 4) changes accordingly.

→ 2. Under **Media types**, select the media types to be included in your activity overview. Select or clear the appropriate check box.

✔ If you have selected one or several mailing types, the data displayed in the activity overview (in area 4) changes accordingly.

→ 3. Under **Mailing status**, select the mailing status to be included in your activity overview. Select or clear the appropriate check box.

✔ If you have selected one or several mailing statuses, the data displayed in the activity overview (in area 4) changes accordingly.

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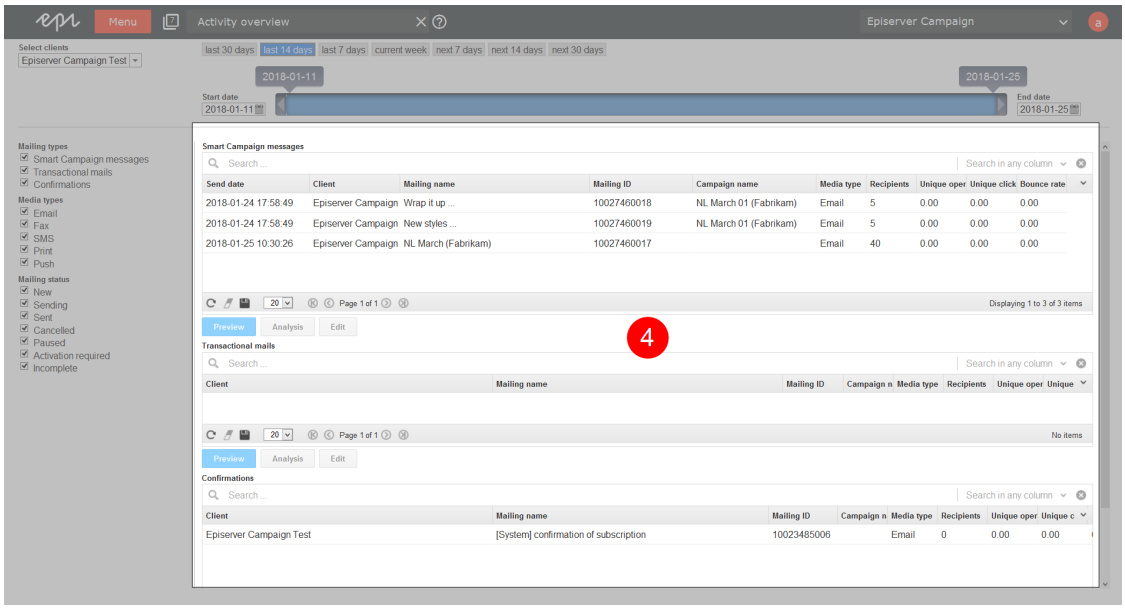
Area 4: Open activity overview and other features



If you have selected at least one client, one mailing type, one media type and one mailing status, the activity overview will be shown in area 4. The activity overview updates itself automatically if you change the settings in areas 1, 2 or 3.

There are also 3 buttons in this area that you can use to show a content preview of a mailing, open the campaign analysis or switch to the edit window of a selected element.

Show content preview

To show the content preview of a mailing, perform the following steps:

→ 1. In the activity overview, mark the mailing that you would like the content preview to show.

→ 2. Click Preview.

✔ The content preview of the mailing opens as a dialog window.

Open campaign analysis

To open the campaign analysis, perform the following steps:

→ 1. In the activity overview, mark the campaign for which you would like to open the campaign analysis.

→ 2. Click Analysis.

✔ The campaign analysis window for the selected campaign opens.

Switch to the edit window of an element

To switch to the edit window of a selected element, perform the following steps:

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1. In the activity overview, mark the element which you would like to edit.
2. Click Edit .

✔ The element's edit window opens.

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Service and support

In this chapter, you'll find the contact details for our customer support team in case you have any queries or problems. As well as this, here you can find out about the wide range of services we offer, such as cost-free training sessions, individual seminars, or our full-service dispatch.

- Customer support: Contacting the Episerver customer support team
- Full service dispatch: Subcontracting mailing dispatch to Episerver

Customer support

Our customer support is available by phone or email, Monday to Friday, **9 a.m. to 6 p.m.** (CET). If you cannot find an answer to a particular question, we would be pleased to help you.

+46 8 555 827 50

developersupport@episerver.com

Full service dispatch

The situation:

You would like to send your customers mailings at regular intervals but just do not have the time for importing new recipients, creating new mailing content, or conducting final quality checks before sending them out.

The solution:

Take advantage of the full service mailing dispatch from Episerver. Simply supply us with the addresses, the latest content and a template for your newsletter and Episerver will take care of the rest, including reporting once the process is finished.

The benefits:

Once we have an acceptable layout, we can use it for all subsequent newsletters – all you need to do is provide us with updated content. We will send you a test mailing for your approval prior to dispatch.

What we need from you

For us to generate mailings that meet your needs, we require the following information:

- **Recipient data and test recipients** as a CSV file (containing at least an email address)
    - If the mailing is to be personalized, also include salutation/title, first and last name as well as any other criteria desired

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- If target groups are being used, also include supplementary columns (e.g., only distribute to recipients who specified "mobile device" when registering; or only distribute to recipients with addresses with a zip code of 49)

- **Newsletter template** as HTML file or graphic
- **Subject line** for the mailing
- **Sender** (e.g., Your Company Product News) and return address (e.g., news@example.com) You will need to delegate the sending domain to Episerver beforehand. This can take up to 72 hours; Episerver has no influence over the time required. Also be aware that domains delegated to us may not be used for any other purpose (e.g., as a log-in page), since the selection would produce no response. If for any reason you are unable to delegate a sending domain, contact our customer support at developersupport@episerver.com.
- **Email address** to which **replies** must be sent.
- Current content, where it differs from the template.
- Planned **dispatch date**.

To avoid complaints about unsolicited emails, observe the following with respect to recipient addresses:

- All addresses must have received an opt-in, confirming the recipient's desire to receive promotional emails.
- We also require confirmation from you that you can verify this approval for each address upon request.

Lead in time

You should plan sufficient lead time to ensure that mailings can be sent on schedule. We will create a specific timetable once we have all the necessary information. This will contain the following information:

- date for sending a test mailing
- date by which correction requests must be submitted
- date by which any corrections will be incorporated and sending of second test mailing
- date by which mailing must be approved
- date for sending

You should allow enough time to evaluate the test mailing, incorporate any correction requests, and provide final approval. We recommend that you allow for approximately five working days following submission of the required information.

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What Episerver does for you

Once you have supplied us with all information and the planned sending date, our specialized staff will take care of the rest for you. This includes:

- **Scheduling**: Once we have all the information, we will send you a schedule showing when the mailing will be ready for testing, by what date we will need correction requests from you, the date by which those corrections will have been incorporated and when we will need final approval from you.
- Address check: Before we import all the recipients, we first check for any problem addresses, which are not imported. We will contact you should we have any concerns that a significant number of addresses pose a potential problem.
- **Importing addresses**: We compile a recipient list that matches the structure of your address list and then import the recipients for you.
- **Creating the mailing**: We create a multi-stage mailing based on your newsletter template. Any graphics included in the template will result in greater effort on our part and therefore increase the cost to you. Therefore, it is best to include all graphics in the form of an HTML file in the newsletter template you provide.
- **Modification of contents**: If current mailing content differs from the template, we will incorporate the new content (text and images).
- **Testing and quality control**: Your mailing is tested before it is sent out to test recipients. This includes the following:

    a. Testing of delivery prior to sending: Episerver checks whether major providers and freemailers (T-Online, web.de, GMX etc.) send the mailing on to the intended in-boxes or whether it is caught by spam filters. In addition, a range of other criteria are also tested (Does the subject line display in full?; Are all linked URLs accessible?, etc.).

    b. Spam check prior to sending: The mailing is also tested for suspected spam by applying more than 750 norms. If one of these produces a hit, there will still be time to make changes while keeping to the sending date schedule.

    c. Display testing: Prior to sending, Episerver uses automatically generated screen shots to check whether your mailing displays properly through the following providers, free mailers and browsers:

Provider	Free mailer	Browser
Microsoft Outlook 2003	gmx.de	Internet Explorer 8
Microsoft Outlook 2007	Hotmail	Internet Explorer 9
Microsoft Outlook 2010	t-online.de	Google Chrome
	web.de	Mozilla Firefox

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Provider	Free mailer	Browser
		Apple Safari

Be aware that your mailing may not display the same way in all of these clients; minor variations may occur.

- **Sending of test emails to customers**: Once your mailing has passed our quality control, it is sent out to the test recipients you supplied in advance. This lets you screen the contents one last time. After that, you will notify us in writing (by email) that you approve the mailing for general sending or send us your requests for corrections.
- **Incorporation of corrections**: We incorporate your changes into the mailing in accordance with the prearranged schedule and send it to the test recipients a second time.
- **Sending of mailings to a predefined distribution list**: Once we have received final approval from you, the mailing is sent to all the recipients on the distribution list according to a predetermined schedule.
- **Send report to customer**: Once the mailing has been sent out, you will receive an initial report in PDF format within two work days, containing the following information (in the form of both diagrams and data). You will receive a final report ten work days after sending date:
    - Recipients
    - Emails opened/unique opens/opens over time
    - Opening rate (%)
    - Clicks/unique clicks/clicks over time/total clicks by link
    - Click-rate (%)/effective unique click-rate (%)
    - No. of returns/return rate (%)
    - No. of unsubscriptions/unsubscription rate (%)

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