

# EPiSERVER MAIL

Release 4.3.0



## User's Guide

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# EPiSERVER

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## About EPiServer Mail

### StarMail becomes EPiServer Mail

The Swedish company EPiServer, the world's fastest growing provider of Web Content Management (WCM) platforms, has acquired Netstar. The former product StarMail has in the acquisition become EPiServer Mail.

### Powerful software for distribution of e-mails and newsletters

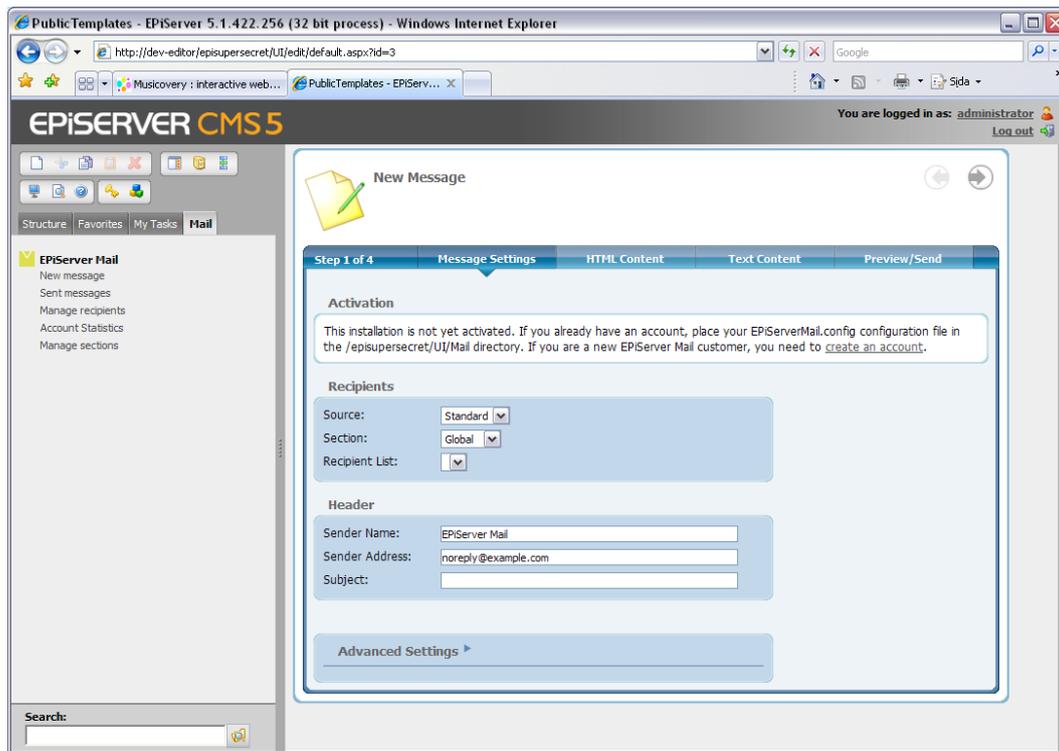
EPiServer Mail is powerful software for distribution of e-mails and newsletters. EPiServer Mail is built to handle very large numbers of emails or newsletters. EPiServer Mail consists of a Client part (EPiServer Mail Editor) and a Server part (EPiServer Mail Service), where the Client part is described in this User's Manual. In the Client part, the message is created and the distribution is set and initiated. Then there is an order email with advanced Meta data sent to the dedicated EPiServer Mail mass distribution servers. The servers distributes the e-mails and newsletters without disturbing or absorbing important power from the senders IT environment. Real time statistics for each distribution is available instantly.

# Walkthrough of EPiServer Mail

## Main View

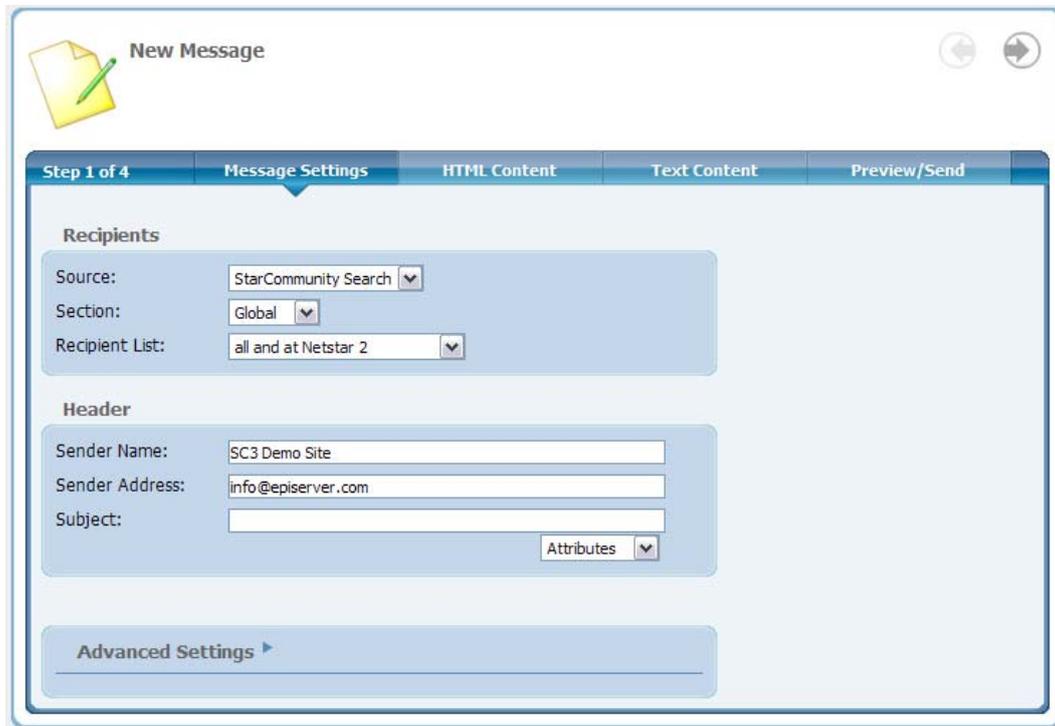
When you have successfully logged in to EPiServer Mail, the main view is displayed. The main view consists of the following three menu options:

1. **New Message** – here you create, select and initiate the distribution of newsletters or e-mails to your target group.
2. **Sent Messages** – here you can see sent messages and newsletters. And follow up with statistics and results from each message and newsletter that has been sent.
3. **Manage Recipients** – here you can select, import and manage lists of recipients.
4. **Account Statistics** – here you can view information and statistics about prices and Sent messages.
5. **Manage sections** – this option is only available to users with administrator rights. It gives you the opportunity to create sections where you can group lists and give rights for specific editor's to use them.



## New Message

From this view, you can easily compose and distribute messages to your target group. There are four tabs with settings to set before you can distribute your message. Different colors indicate the status of a tab. If a setting within a tab is incorrect the tab will be displayed with a light blue color. A dark blue color indicates that all settings are correct.



The screenshot shows the 'New Message' interface with the 'Message Settings' tab selected. The interface includes a title bar with a yellow folder icon and the text 'New Message'. Below the title bar is a navigation bar with five tabs: 'Step 1 of 4', 'Message Settings', 'HTML Content', 'Text Content', and 'Preview/Send'. The 'Message Settings' tab is active and contains the following sections:

- Recipients:** Includes three dropdown menus: 'Source' (StarCommunity Search), 'Section' (Global), and 'Recipient List' (all and at Netstar 2).
- Header:** Includes three text input fields: 'Sender Name' (SC3 Demo Site), 'Sender Address' (info@episerver.com), and 'Subject'. There is also an 'Attributes' dropdown menu.
- Advanced Settings:** A button with a right-pointing arrow.

## Message Settings

### Header

In the Header area the message information is selected, which is displayed for the recipients when they receive the message.

### Recipients

Here it is possible to select from where to get recipients lists, and which recipients list to use.

## Advanced settings

Optimize for spam filters allows you to select whether or not you want to sacrifice some statistics collection to avoid having your newsletter classified as a spam.

Remove active content tags allows you to select whether or not you want EPIserver Mail to remove any SCRIPT, APPLET, OBJECT and EMBED tags in the HTML content. This also removes on-mouse-over and similar attributes from other tags. This function can be convenient for instance if using a page published on a web site where the page template contains these types of tags.

**Advanced Settings** ▼

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Optimize for spam filters

Remove active content (SCRIPT, APPLET, OBJECT, EMBED, FORM) tags

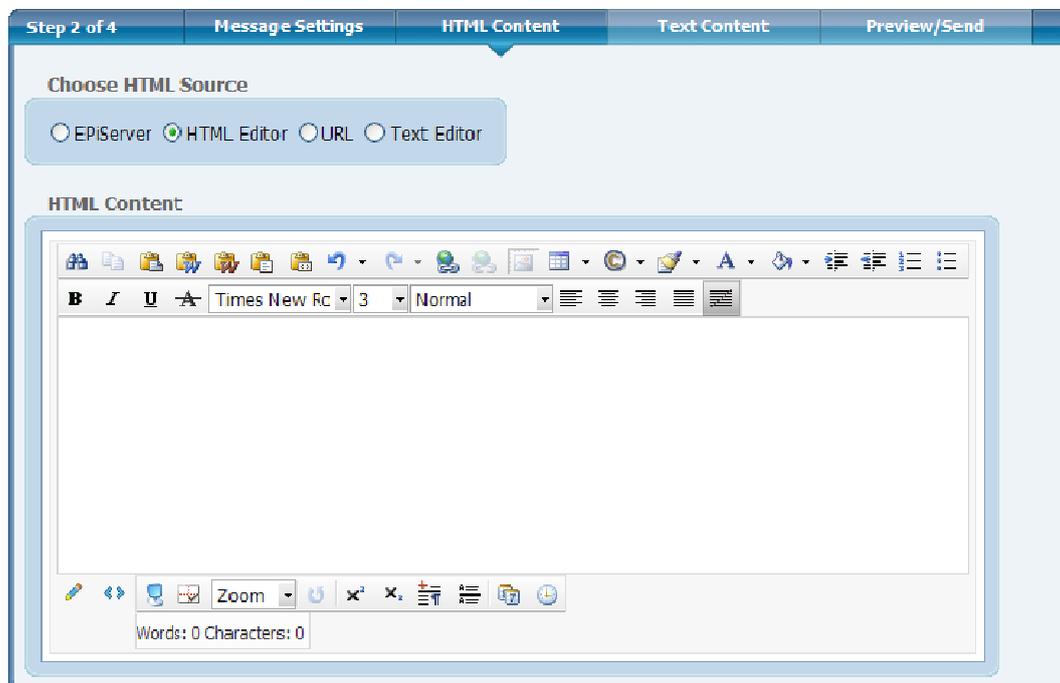
## HTMLContent

You can either choose to send an URL to your recipients or create a new message with the HTML or Text Editor. It is also possible to select pages created in EPIserver CMS and use as a message.

**Note:** If EPIserver CMS is used, a third tab will be displayed, from where you can select the page to include in your message.

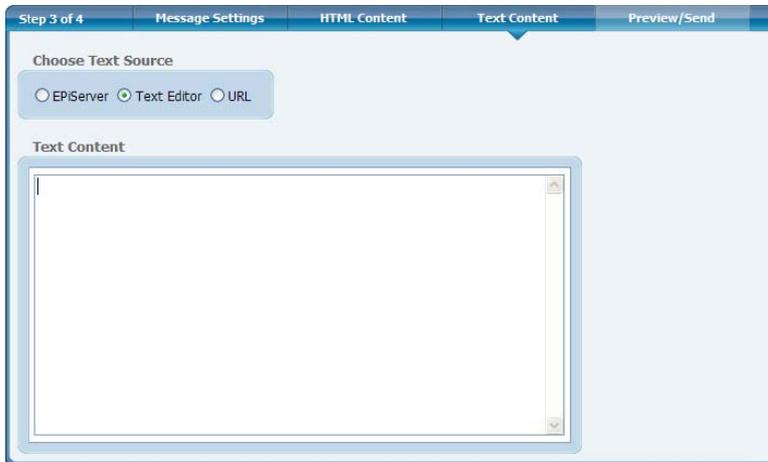
You can put in variables in the HTML editor that personalize the message, e.g. to have every recipient name automatically pasted in each distributed message. EPIserver Mail supports use of up to 20 variables.

**Note:** The HTML editor is an easy way to create an HTML message. However, to ensure that all tags and formatting remain in the final output just as intended, it may better to use the Text Editor.



## Text Content

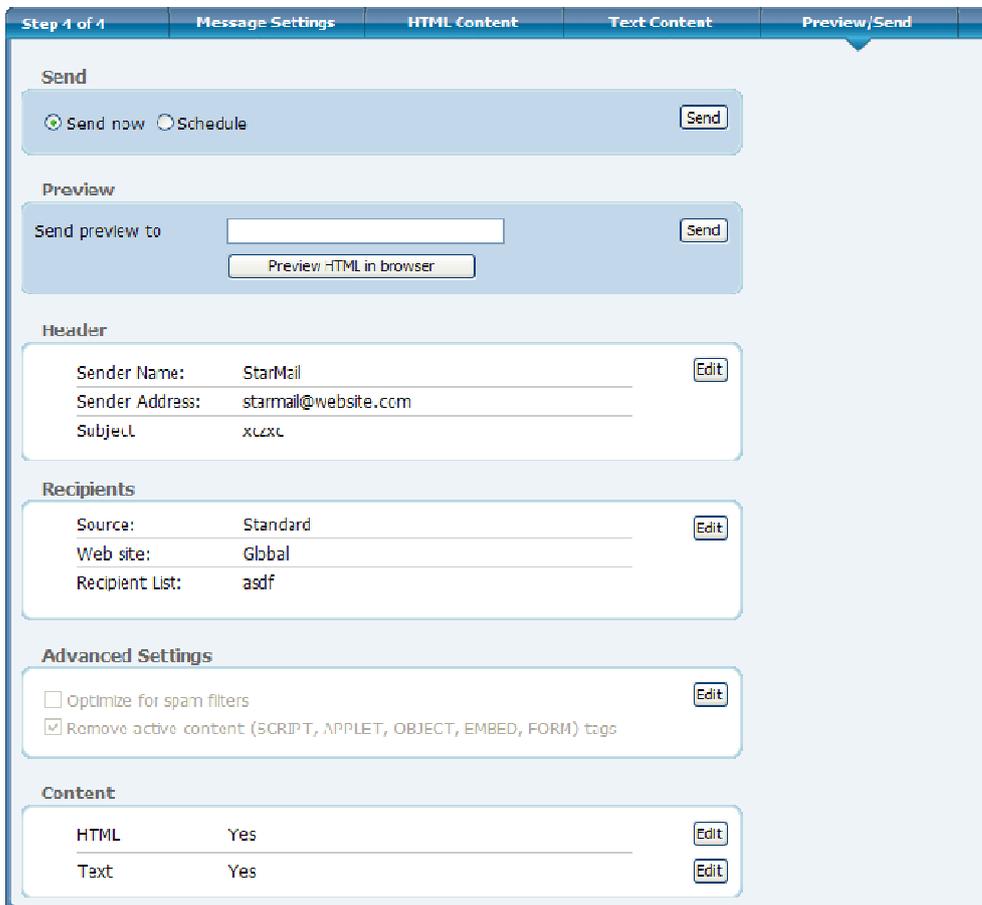
Here you write the text that you want to be displayed for the recipients if they do not support HTML in their e-mail client. It is possible to write the message in a text editor or to send a URL that is automatically shown if the recipients email client does not support HTML.



## Preview/Send

In the Preview/Send step you can view the message content and all settings before actually sending or scheduling to send your message. To make changes click Edit to go back.

It is also possible to preview the HTML content in your web browser. Please note that depending on different mail client software, your web browser may not accurately represent the design that recipients will see when opening the message.



## Scheduling

You can choose to schedule message to be distributed for a specific day and time. This feature is convenient when you want the mail to be sent when you are not able to push the “Send” button yourself, such as during holidays or special events.

**Send**

Send now
  Schedule

**Preview**

Send preview to

< March 2008 >

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| 24  | 25  | 26  | 27  | 28  | 29  | 1   |
| 2   | 3   | 4   | 5   | 6   | 7   | 8   |
| 9   | 10  | 11  | 12  | 13  | 14  | 15  |
| 16  | 17  | 18  | 19  | 20  | 21  | 22  |
| 23  | 24  | 25  | 26  | 27  | 28  | 29  |
| 30  | 31  | 1   | 2   | 3   | 4   | 5   |

After sending your message, you can choose to go back to your current message, compose a new message or choose any of the options in the main menu.

**Sending E-mail**

Your E-Mail has been scheduled for delivery on 12:00 AM



**Compose New Message**



**Back to current message**

## Sent Messages

As shown in the figure below, all statistics regarding sent messages in EPiServer Mail are saved and it is possible to look at them in real-time. For instance, it is possible to see how many recipients that have opened the message or how many recipients that have clicked on a particular link.

The sent messages view has a search interface, where you can search by Web site, recipient list, subject and the date when the message was sent. The clock icon indicates that the message has been scheduled to send.

### Sent Messages

Section:

Recipient List:

Subject:

Sent date:

from:

to:

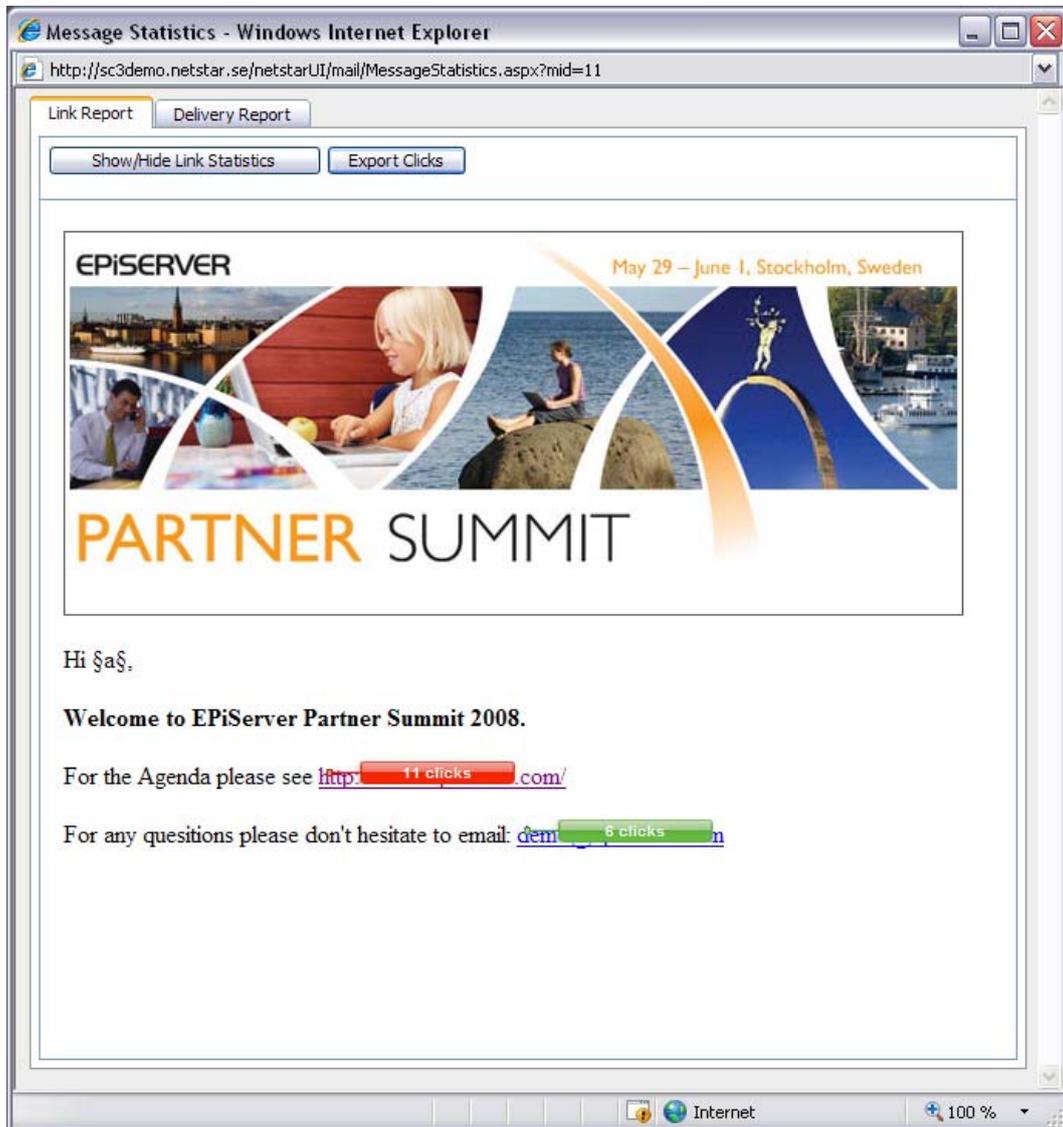
| Subject                                    | Sent      | Scheduled | Recipient List           | Recipients | Opened | Clicks |   |
|--|-----------|-----------|--------------------------|------------|--------|--------|---|
| <a href="#">Hi SaS</a>                     | 5/31/2008 |           | Andreas Demo List        | 7          | 2      | 1      | ✘ |
| <a href="#">Hi SaS</a>                     | 5/29/2008 |           | Andreas Demo List        | 7          | 4      | 5      | ✘ |
| <a href="#">Newsletter May 2008 to SaS</a> | 5/29/2008 | 🕒         | EPiServer Mail Demo List | 12         | 9      | 17     | ✘ |
| <a href="#">Newsletter</a>                 | 5/29/2008 |           | Andreas Demo List        | 7          | 3      | 3      | ✘ |
| <a href="#">newsletter</a>                 | 5/29/2008 | 🕒         | Andreas Demo List        | 7          | 3      | 0      | ✘ |
| <a href="#">Newsletter (test) SaS</a>      | 5/28/2008 |           | Andreas Demo List        | 7          | 3      | 6      | ✘ |

## Message Statistics

Click the name of one of the listed messages to bring up the Message Statistics window.

### Link Report

On the first tab, **Link Report**, statistics can be visualized with markers showing how many clicks have been made to each link. The second available option is exporting a list of who has clicked which links as a file.



The screenshot shows a web browser window titled "Message Statistics - Windows Internet Explorer". The address bar contains the URL "http://sc3demo.netstar.se/netstarUI/mail/MessageStatistics.aspx?mid=11". The page has two tabs: "Link Report" (selected) and "Delivery Report". Below the tabs are two buttons: "Show/Hide Link Statistics" and "Export Clicks".

The main content area features a banner for the "EPISERVER PARTNER SUMMIT" held from "May 29 - June 1, Stockholm, Sweden". The banner includes images of people at a computer, a person on a rock, and a person on a bridge.

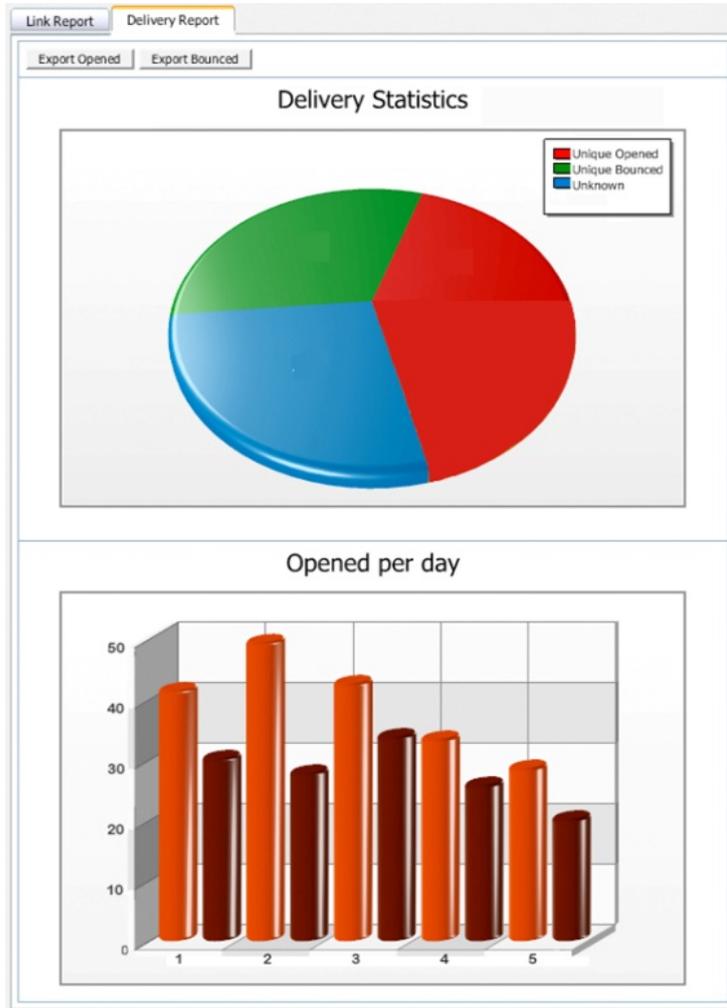
Below the banner, the text reads: "Hi şaş," followed by "Welcome to EPiServer Partner Summit 2008." Two links are provided with click counts:

- For the Agenda please see <http://demo.com/> (11 clicks)
- For any questions please don't hesitate to email: [demo@demo.com](mailto:demo@demo.com) (6 clicks)

The browser's status bar at the bottom shows "Internet" and "100 %".

## Delivery Report

On the second tab, **Delivery Report**, there are pie charts visualizing the most important statistics, as well as options to export lists of the people who have opened the message and the addresses that bounced it.



## Manage Recipients

It is possible to import and to export recipients list from and to external applications. All recipient lists are displayed as shown below with information about list creation date and the number of recipients it contains. The source "Standard" is for sources imported from text or XML files into EPiServer Mail. Other sources, such as EPiServer Community or EPiServer CMS, may be available depending on your installation.

**Manage Recipients**

Select Recipient Source

Source: StarCommunity Search

Section: Global

| Name                         | Created   | Recipients |  |  |
|------------------------------|-----------|------------|--|--|
| All at EPiServer 28 May 2008 | 5/28/2008 | 23         |  |  |
| All with alias "stjernan"    | 5/28/2008 | 1          |  |  |
| All at Netstar               | 5/30/2008 | 20         |  |  |
| all with and on Netstar      | 5/31/2008 | 3          |  |  |
| all and at Netstar 2         | 5/31/2008 | 3          |  |  |

### Import Standard Recipient List

EPiServer Mail can import e-mail address lists from XML and CSV text files (semi colon separated).

#### CSV files

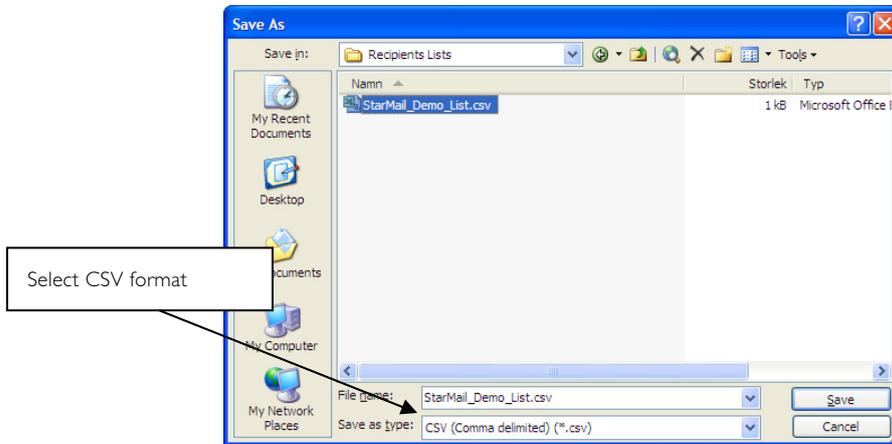
Most common is to import e-mail lists from Excel. When importing email addresses from Microsoft Excel the file needs to be saved in a specific format.

The first row is a header row and is not imported to EPiServer Mail. The first column is always used as the email address. It is possible to import a list that consists of only one column with email addresses. In the example above, there are additional columns with variables such as Name, Sur Name and Title. These variables can be used for different needs and are used to personalize each email sent from EPiServer Mail. EPiServer Mail handles up to 20 variables for each recipient list.

**Note:** For more information about designing your own personalized messages, see the Developer's Guide for EPiServer Mail.

|   | A  | B           | C               | D               |
|---|--|-------------|-----------------|-----------------|
| 1 | <b>E-mail</b>  | <b>Name</b> | <b>Sur Name</b> | <b>Title</b>    |
| 2 | <a href="mailto:emailA@netstar.se">emailA@netstar.se</a> | Andreas     | Stjernström     | Partner Manager |
| 3 | <a href="mailto:emailB@netstar.se">emailB@netstar.se</a> | Gustav      | Lagercrantz     | CEO             |
| 4 | <a href="mailto:emailC@netstar.se">emailC@netstar.se</a> | Elvis       | Presley         | The King        |
| 5 | <a href="mailto:emailD@domain.com">emailD@domain.com</a> | Tiger       | Woods           | Golf Pro        |
| 6 |  |             |                 |                 |
| 7 |  |             |                 |                 |
| 8 |  |             |                 |                 |

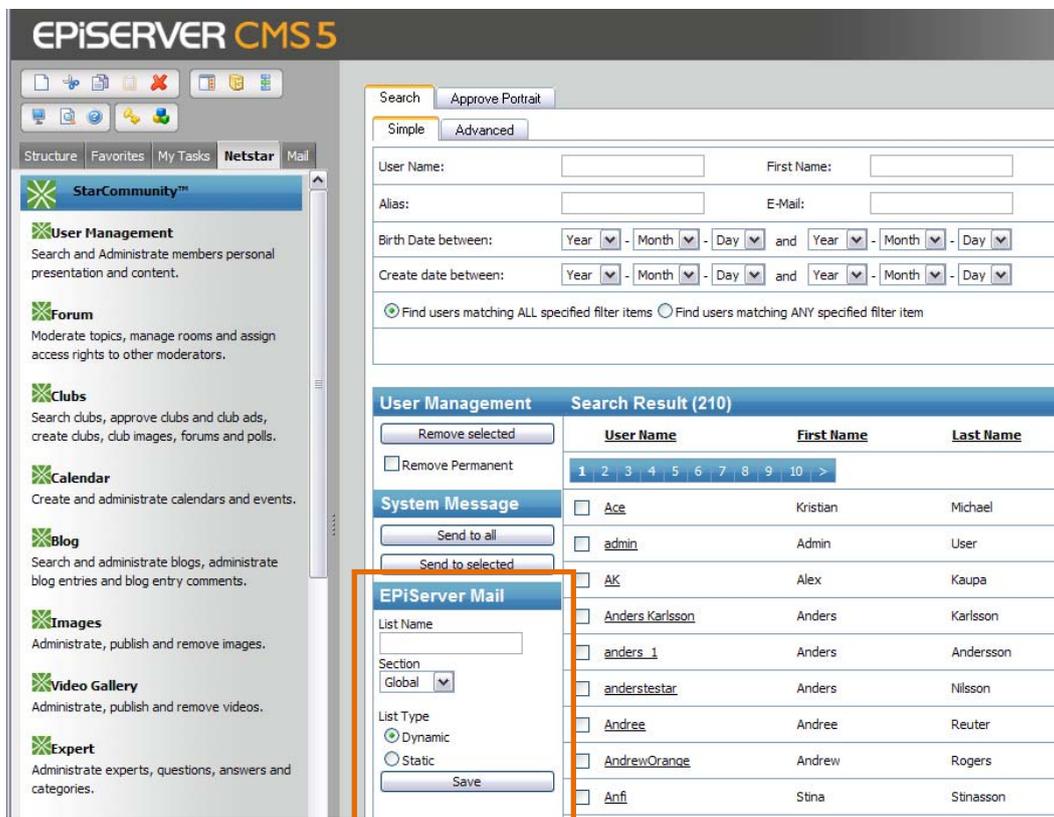
Save the Excel sheet as a CSV-file (Semi colon delimited) and make sure that the file has the format UTF-8. If it is not possible to make sure that the CSV-file is in UTF-8 format, open the file with a regular text editor, such as Notepad, and save the file again making sure that the file is in UTF-8 format.



**Note:** Information regarding invalid records for a list of recipients can be downloaded.

### Save Email Addresses from the search result in EPiServer Community

If you use EPiServer Community, it is possible to save e-mail addresses from the search results in User Management within EPiServer Community directly to EPiServer Mail. This option makes it easy to send bulk e-mail or newsletters to different selections of members in EPiServer Community. The e-mail addresses can be saved to a static list or to a dynamic list.



## Message Bounces

The EPiServer Mail server collects information about emails that bounce. The information is delivered with Web Services to the sender. It is up to the sender to decide action on e-mail addresses that bounce. For example, if an address bounces more than two times it can be removed from that specific recipients list.

## Manage Sections

This option is only available to users with administrator rights. It gives you the opportunity to create sections where you can group lists and give rights for specific editor's to use them.



## Account Statistics

Account Statistics makes it possible for you to easily follow up information and statistics about prices and the number of sent messages the last three months. The statistics and information is directly connected to the license agreement and the current price list.

## System requirements

### Client side (administrators)

- Internet Explorer 6 / Firefox 1.5