

EPiSERVER MAIL

Version 5.0



User Guide

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EPiSERVER

Table of Contents

ABOUT EPISERVER MAIL	5
Main Functionality.....	5
The Way EPiServer Mail Works.....	5
About EPiServer Mail Help.....	5
About the Help Contents.....	6
Expected Knowledge.....	6
References.....	6
GETTING STARTED WITH EPISERVER MAIL	7
How to Access EPiServer Mail in EPiServer CMS.....	7
SENDING A NEW MAILING	9
Mailing Settings Tab.....	9
HTML Content Tab.....	10
Text Content Tab.....	11
Preview/Send Tab.....	12
REVIEWING SENT MAILINGS	14
MANAGING RECIPIENTS	16
Import Standard Recipient List.....	16
Bouncing Messages.....	17
Unsubscribe to Mailings.....	17
MESSAGE STATISTICS	18
ACCOUNT STATISTICS	19
MANAGE SECTIONS	20
EPISERVER COMMUNITY INTEGRATION	21

About EPiServer Mail

E-mail communication is becoming increasingly important. As part of the digital marketing communication mix, EPiServer Mail is one of the best tools for communicating with your target audience and engaging them in a dialogue. E-mail communication is fast, cost-efficient and enables you to distribute personalized content to your audience.

A well-designed e-mail must be easy to create and distribute. When properly used, e-mail communication enables you to convey selected topics to your audience and create demand, increase brand awareness, generate sales opportunities and drive traffic to your web site. It is also an efficient tool for internal information. For e-mails to create the desired results, the communication must be developed directly for the target audience.

With EPiServer Mail you can easily handle small, targeted e-mail campaigns or larger mailings. You can send the e-mails to an unlimited number of recipients, personalize the mailings and schedule when the mailing should be executed. This enables you to build powerful information or marketing campaigns.

Main Functionality

With EPiServer Mail you can deploy an e-mail communication initiative from any location; all you need is Internet access. One of the main advantages of EPiServer Mail is that you create your e-mails directly from your EPiServer CMS environment which is already in place for your external website, intranet, extranet or your EPiServer community. This way content is only produced once and reused in multiple channels, saving time and resources, and improving quality. It also ensures that traffic is driven to the website.

Some of the major functions in EPiServer Mail are:

- Fast creation of mailings and other recurring e-mail communication efforts
- Send any Internet page to multiple recipients
- Send mailings to an unlimited number of recipients
- Detailed statistical data in real-time
- An unlimited number of recipient lists

The Way EPiServer Mail Works

EPiServer Mail is a powerful software for distribution of e-mails and newsletters. It is built to handle very large numbers of e-mails or newsletters and consists of a client part (EPiServer Mail Editor) and a server part (EPiServer Mail Service). The client part is described in this user guide.

In the client part, the message is created and the distribution is set and initiated. Then there is an order e-mail with advanced metadata sent to the dedicated EPiServer Mail mass distribution servers. The servers distribute the e-mails and newsletters without disturbing or absorbing important power from the sender's IT environment. Real-time statistics for each distribution is available instantly.

About EPiServer Mail Help

EPiServer Mail features a web help, where the structure reflects the menu layout in the user interface.

How to Access the Help

You can access the web help as follows:

From EPiServer OnlineCenter

From the EPiServer OnlineCenter menu (which is always visible at the top), click the ? icon and select the system for which you want to view the help. Browse or search for the topic where you need guidance.

About the Help Contents

This help covers the following parts:

- Creating mailings using EPiServer Mail
- Handling the statistics of mailings

Expected Knowledge

As a reader of this help, you are assumed to have good understanding of the following:

- The standard Windows environment
- Web editing in EPiServer CMS

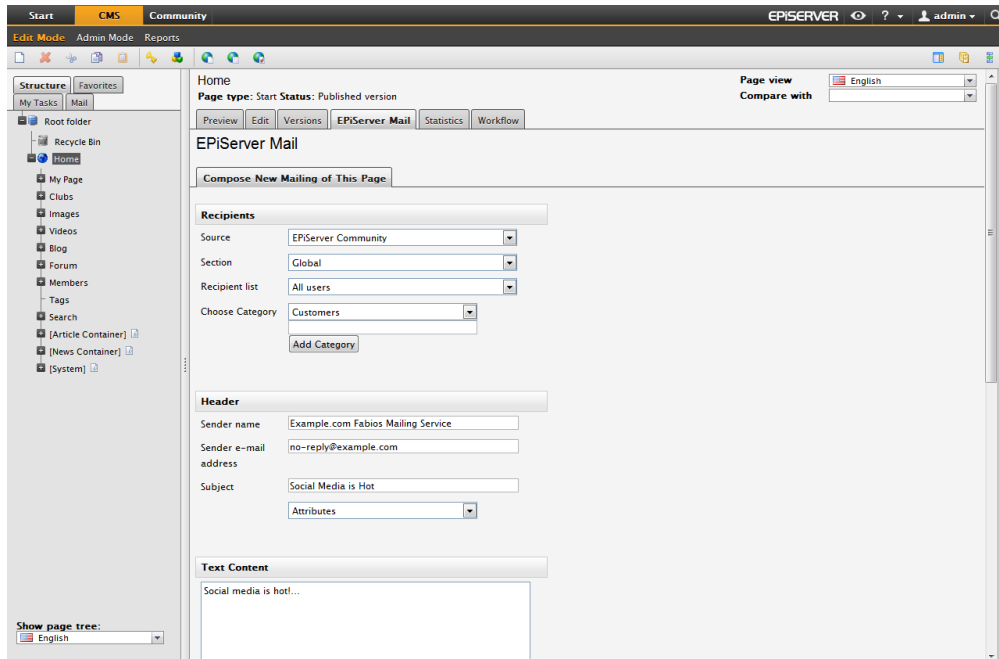
References

The following parts, to be found on EPiServer World, are listed as references and will not be described in this help:

- Web editing, how to use use EPiServer CMS and Live Monitor, see EPiServer CMS Editor's Manual.
- Administration in EPiServer CMS, see EPiServer CMS Administrator's Manual.

Getting Started with EPiServer Mail

When you have successfully installed EPiServer Mail and logged into EPiServer CMS Edit mode, the **Mail** tab is visible in the left pane. The main view consists of the following menu options:

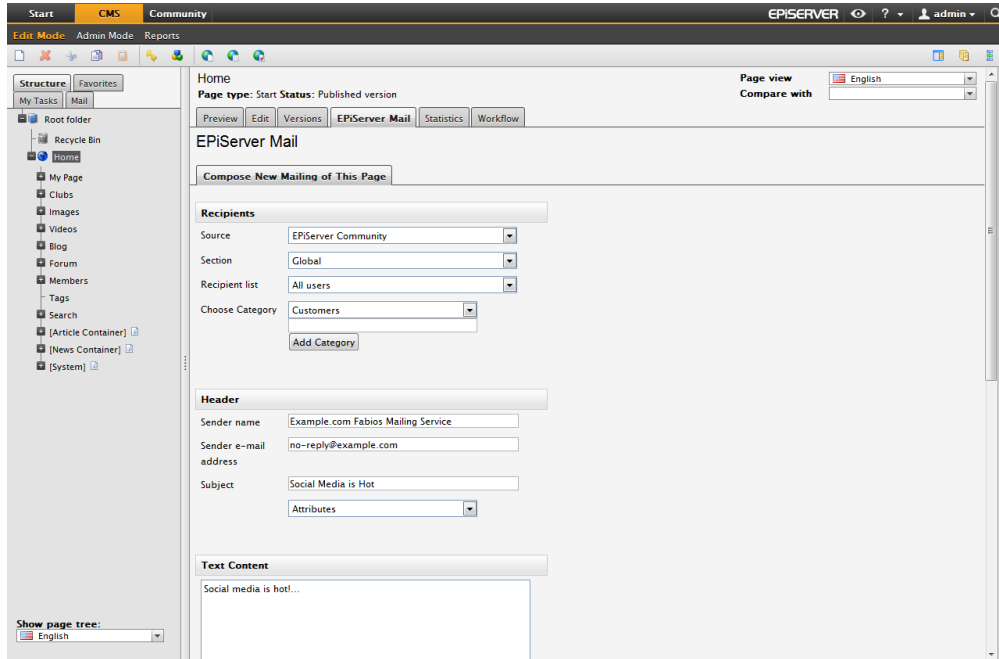


- **New Mailing** - Select to create and initiate the distribution of newsletters or e-mails to your target group.
- **Sent Mailings** - Select to view sent mailings. Statistics and results from each mailing are also displayed here.
- **Manage Recipients** - Select to select and import lists of recipients.
- **Account Statistics** - Select to view the statistics for the EPiServer Mail account.
- **Manage Sections** - Select to create sections. Sections are a way of grouping lists and giving rights to specific editors.

How to Access EPiServer Mail in EPiServer CMS

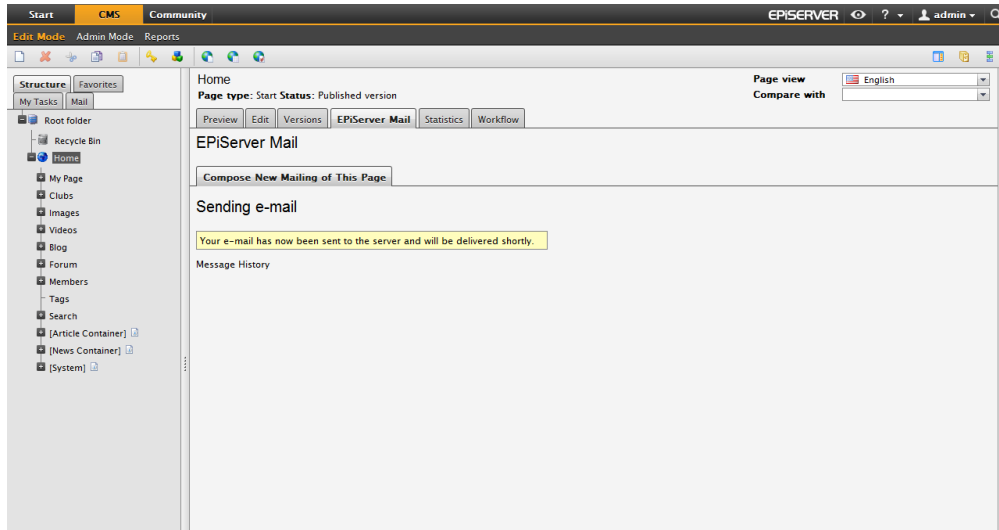
EPiServer Mail is closely integrated with EPiServer CMS. When installing EPiServer Mail, the application will be available not only as a **Mail** tab in the left pane, but also as an **EPiServer Mail** tab on each page of your website. This means that you can easily create mailings from any of the EPiServer CMS pages on your website.

The EPiServer Mail Tab on a Page



Creating mailings directly from an EPiServer CMS page works the same way as when using the **Mail** tab in the left pane. You will find sections for entering recipients information, mailing category, header information with attributes, text content, advanced settings and the preview and sending section.

When you have sent the mailing you will receive a confirmation message. Each page also has a **Message History** tab, where you can see an overview of the mailing statistics for that particular page.



Sending a New Mailing

It is easy to compose and distribute mailings to your target group from the **New Mailing** window, which contains four tabs with settings that need to be entered before you can distribute your mailing.

Mailing Settings Tab

1. In the **Recipients** group box, select where the recipient list should come from (the source) and which recipient list to use. Read more about this under **Manage Recipients**.
2. You also select which **Section** the mailing should be created for. A Section is a way to control the access rights for users to different recipient lists. New sections can be created by clicking **Manage Sections** from the left pane. Read more about section under **Manage Sections**.
3. You also need to choose a **Category** for your mailings. You can create and add categories, for instance “Weekly Newsletter”, for your mailings. This information is used when unsubscribing to a mailing. Read more about this under **Unsubscribe to Mailings**.
4. The predefined information in the **Header** group box can be changed before sending a mailing. Enter a subject for the mailing in the **Subject** field. The information entered in these fields is displayed for the recipients when they receive the e-mail.
5. Based on the information in the recipient lists, you can select one or more of the following attributes from the **Attributes** list in the **Subject** field:
 - **E-mail address**; displays the recipient’s e-mail address in the subject field.
 - **Unsubscribe URL**; displays an unsubscribe link in the subject field.
 - **Recipient ID**; displays the recipient’s ID in the subject field.
 - **Firstname**; displays the recipient’s first name in the subject field.
 - **Lastname**; displays the recipient’s last name in the subject field.

Attributes are available for adding either in the subject field, or in the HTML editor. If you want to add the unsubscribe URL option directly in an EPiServer CMS page (for instance a newsletter template), the unsubscribe link must be added in that specific page template.

The screenshot shows the EPiServer CMS interface for creating a new mailing. The 'New Mailing' window is open, and the 'Mailing Settings' tab is selected. The 'Recipients' section includes dropdowns for 'Source' (Standard), 'Section' (Global), and 'Recipient list'. The 'Choose Category' dropdown is set to 'News'. The 'Header' section contains text input fields for 'Sender name' (Relate 2.0 Demo Site), 'Sender e-mail address' (no-reply@relate.episerver.com), and 'Subject' (\$email\$). The 'Advanced Settings' section has three checkboxes: 'Optimize for spam filters' (unchecked), 'Add parameters to redirected links' (unchecked), and 'Remove active content (SCRIPT, APPLLET, OBJECT, EMBED, FORM) tags' (checked).



The **Optimize for spam filters** check box allows you to select whether you want to sacrifice some statistics collection to avoid having your newsletter classified as spam.

6. Select the **Add parameters to redirected links** check box if you want the information about which recipients have clicked on the links to be sent.
7. The **Remove active content tags** check box allows you to select whether you want EPiServer Mail to remove any SCRIPT, APPLET, OBJECT, EMBED and FORM 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.
8. Continue with the creation of the mailing by clicking the **HTML Content tab**.

HTML Content Tab

You can choose from the following options to send mailings to your recipients:

HTML Editor

When you create a mailing that contains HTML text, it is possible to enter variables in the HTML editor that personalize the message, e.g. to have every recipient name automatically pasted into each distributed message.

EPiServer Mail supports use of up to 20 variables. Enter a variable into your mailing by selecting the appropriate attribute from the **Attributes** drop-down list.

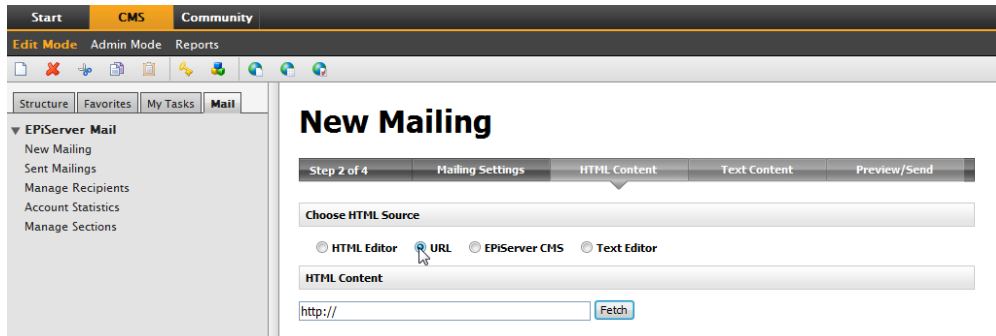


The HTML editor is an easy way to create an HTML message. However, to ensure that all tags and formatting remain in the final output as intended, it may better to use the Text Editor.

The screenshot displays the 'New Mailing' interface in EPiServer Mail. The top navigation bar includes 'Start', 'CMS', and 'Community'. Below this, there are tabs for 'Edit Mode', 'Admin Mode', and 'Reports'. The main interface is divided into a left sidebar and a main content area. The sidebar contains a tree view for 'EPiServer Mail' with options like 'New Mailing', 'Sent Mailings', 'Manage Recipients', 'Account Statistics', and 'Manage Sections'. The main content area is titled 'New Mailing' and shows a progress bar with 'Step 2 of 4' highlighted. Below the progress bar, there are tabs for 'Mailing Settings', 'HTML Content', 'Text Content', and 'Preview/Send'. The 'HTML Content' tab is active, showing a 'Choose HTML Source' section with radio buttons for 'HTML Editor' (selected), 'URL', 'EPiServer CMS', and 'Text Editor'. Below this is the 'HTML Content' editor, which includes a rich text editor toolbar with options for bold, italic, underline, text color, background color, font face, font size, and text alignment. The editor area is currently empty with a cursor. At the bottom of the editor, there is a status bar showing 'Words: 0 Characters: 0'. The bottom left corner of the interface has a 'Show page tree' section with a language dropdown set to 'English'.

URL

1. Select **URL** in the **Choose HTML Source** section.
2. Enter a specific web address for the content by selecting the URL button and entering the appropriate URL. Click **Fetch** to make sure that the URL you request is available with content.



EpiServer CMS

The content from a page on the website can also be used in the newsletter.

1. Select **EpiServer CMS** in the **Choose HTML Source** section.
2. Click **Browse** and browse to the page that contains the content to be used in the newsletter.



Text Editor

Select **Text Editor** in the **Choose HTML Source** section and enter the text that you want to be included in the mailing.

Text Content Tab

In the **Text Content** tab you enter the text that you want to be displayed for the recipients if their e-mail clients do not support HTML. You can select to either write the message in a text editor, select to send an EpiServer CMS page or to send a URL that is automatically shown if the recipients e-mail client does not support HTML.

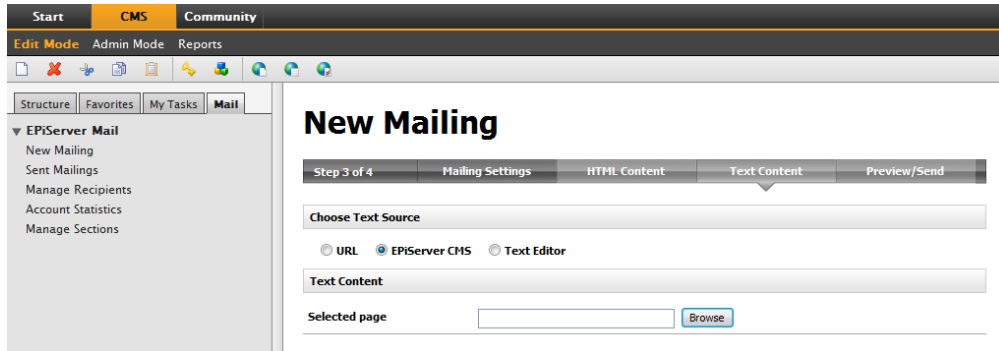
Text Editor

Select **Text Editor** in the **Choose Text Source** section and enter the text that you want to be included in the mailing.

EPiServer CMS

The content from a page on the web site can also be used in the newsletter.

1. Select **EPiServer CMS** in the **Choose Text Source** section.
2. Click **Browse** and browse to the page that contains the content to be used in the newsletter.



URL

1. Select **URL** in the **Choose Text Source** section.
2. Enter a specific web address for the content by selecting the **URL** button and entering the appropriate URL. Click **Fetch** to make sure that you URL you request is available with content.



Preview/Send Tab

In the **Preview/Send** tab you can view the message content and all settings before actually sending or scheduling to send your message.

1. Select when you want to send the mailing in the **Send section**. Select **Send now** if you want the mailing to be sent immediately when you click **Send**. It is also possible to schedule messages to be sent a specific day and time. This feature is convenient when you want the mailing to be sent when you are not able to click **Send** yourself, such as during holidays or special events.
2. Click **View restrictions** to view the mailing restrictions on the EPiServer Mail account.
3. Preview the HTML content in your web browser by clicking **Preview HTML in web browser**.



Your web browser may not accurately represent the design that recipients will see when opening the message, depending on different e-mail client software.

4. Edit any content of the tabs in the mailing by clicking **Edit**.
5. When you are satisfied with the content, click **Send** in the **Send section**.
6. After sending your message, you can choose to go back to your current message, send a new message or choose any of the options in the main menu.

Sending e-mail

Your e-mail has now been sent to the server and will be delivered shortly.



[Compose New Mailing](#)



[Back to current message](#)

Reviewing Sent Mailings

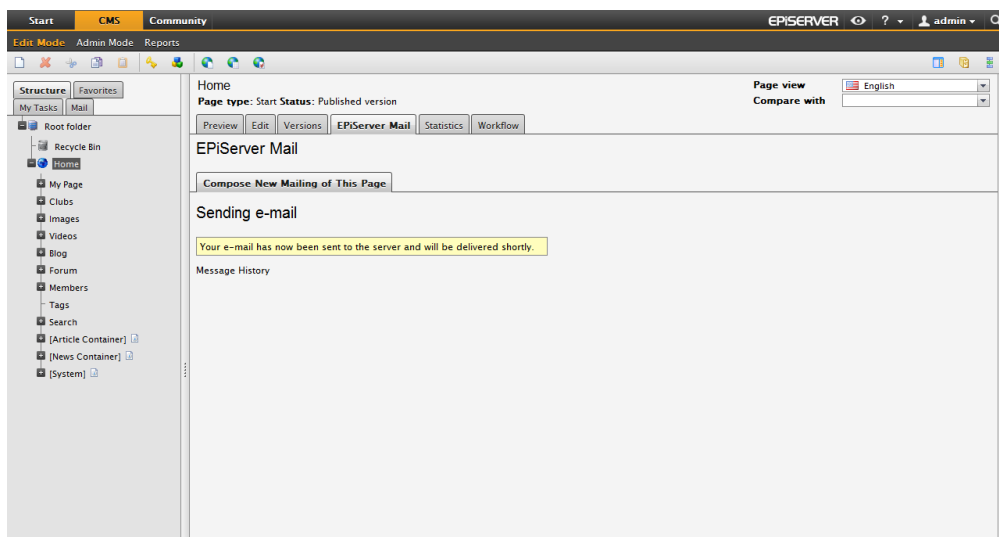
All statistics for sent mailings in EPiServer Mail are saved and it is possible to look at them in real time and see, for example, how many recipients have read the e-mail or how many have clicked on a particular link.



Note, if you remove a recipient list, the statistics for the mail will stop the gathering of information for that mailing.

The sent mailings view has a search interface, where you can search by section, recipient list, subject and the date when the message was sent.

The clock icon indicates that a message has been scheduled to be sent. Hold the cursor over the icon to see the scheduled date and time for the mailing.



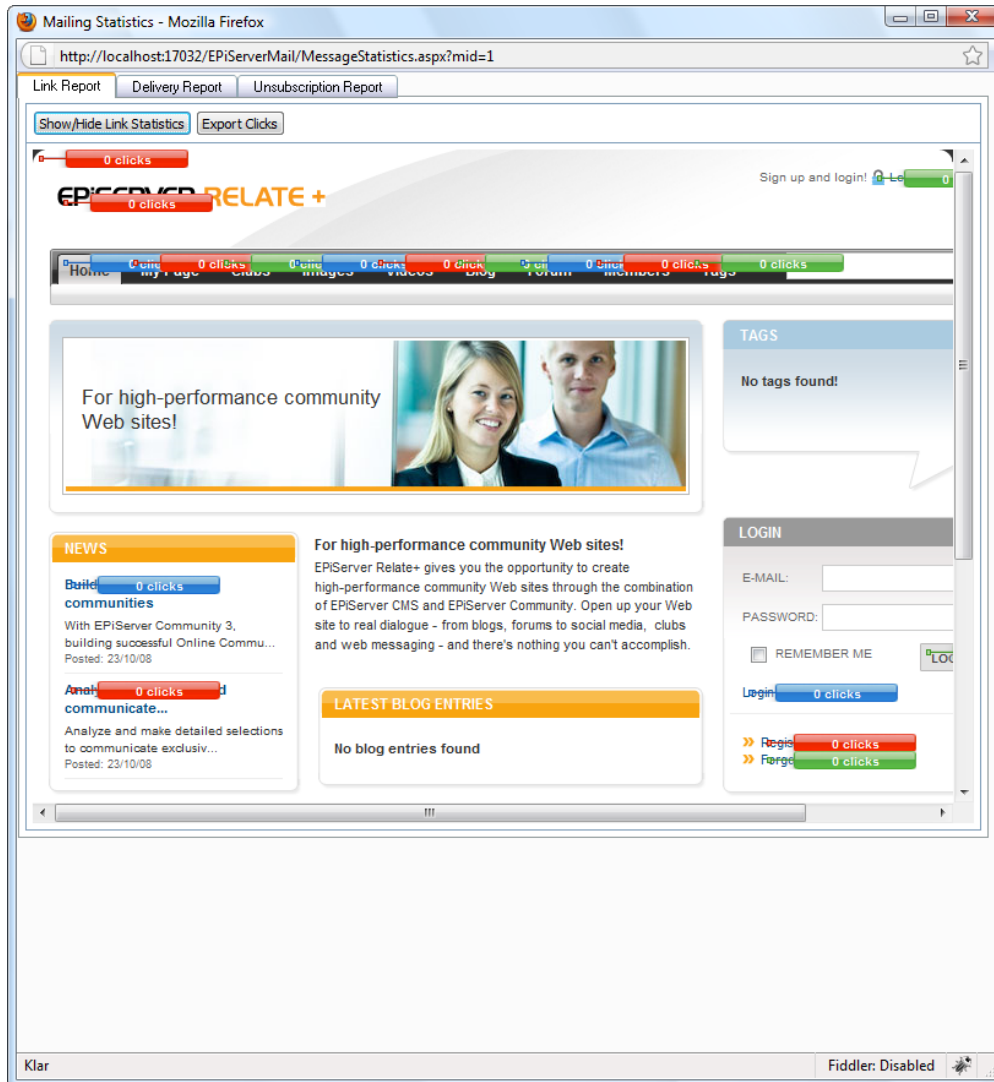
Mailing Statistics

Click the name of one of the listed mailings to open the **Mailing Statistics** window, which consists of the **Link Report** and **Delivery Report** tabs.

Link Report Tab

The **Link Report** tab allows link statistics to be visualized with markers showing how many clicks have been made to each link. Click **Show/Hide Link Statistics** to show and hide the link statistics for the mailing.

It is also possible to export a list of who has clicked which links as a file. Click **Export Clicks** and select to open or save the file.



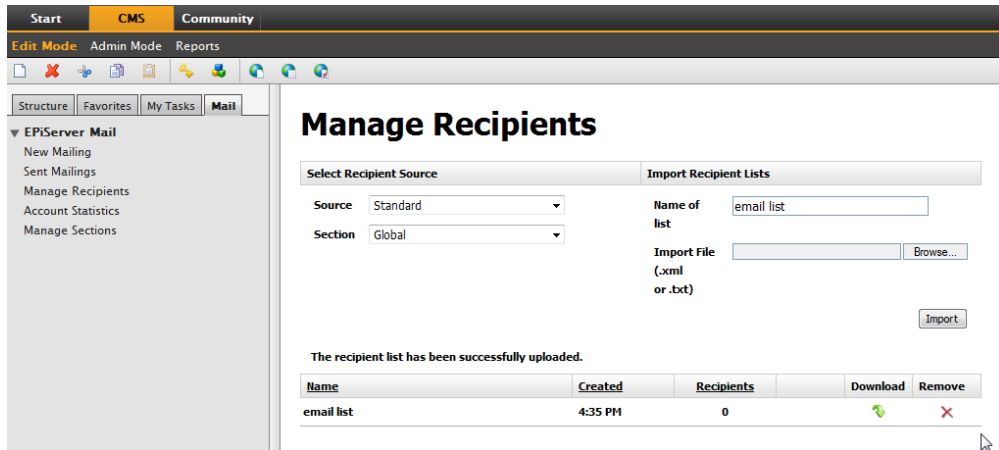
Delivery Report Tab

The **Delivery Report** tab displays pie charts and graphs 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.

Export information on opened and bounced messages by clicking **Export Opened** or **Export Bounced** and selecting to open or save the file.

Managing Recipients

Recipient lists can be imported and exported 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 **Standard** source 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.



Import Standard Recipient List

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

CSV files

The most common way to import e-mail lists is from Microsoft Excel. When you import e-mail 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 into EPiServer Mail. The first column is always used as the e-mail address. It is possible to import a list that consists of only one column with e-mail addresses. In the example above, there are additional columns with variables such as first name, last name and title. These variables can be used for different needs and are used to personalize each e-mail sent from EPiServer Mail. EPiServer Mail handles up to 20 variables for each recipient list.

For further information about designing your own personalized messages, see the Developer's Guide for EPiServer Mail on EPiServer World.

	A	B	C	D	E
1	E-mail	Name	Sur Name	Title	
2	name1@email.com	Name1	Surname1	Title1	
3	name2@email.com	Name2	Surname2	Tilte2	
4	name3@email.com	Name3	Surname3	Title3	
5	name4@email.com	Name4	Surname4	Title4	
6					
7					

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.

Bouncing Messages

The EPiServer Mail server collects information about e-mails that bounce. The information is delivered with Web Services (a non-EPiServer specific integration method) 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.

Unsubscribe to Mailings

The recipient of a mailing will always have the possibility to unsubscribe. This is a built-in function which offers two possibilities:

1. The recipient can choose to unsubscribe only to a mailing of a certain category, for instance a weekly newsletter. The recipient will be excluded from all further mailings of this category.
2. The recipient can also choose to unsubscribe to all mailings from this particular EPiServer Mail sender installation. The recipient will not receive any future mailings from this site.

When the recipient clicks on the unsubscribe link in the mailing, the unsubscribe option page will be displayed. The recipient can then choose either option to unsubscribe.



If you want to add the unsubscribe URL option directly in an EPiServer CMS page (for instance a newsletter template), the unsubscribe link must be added in that page template

EPISERVER

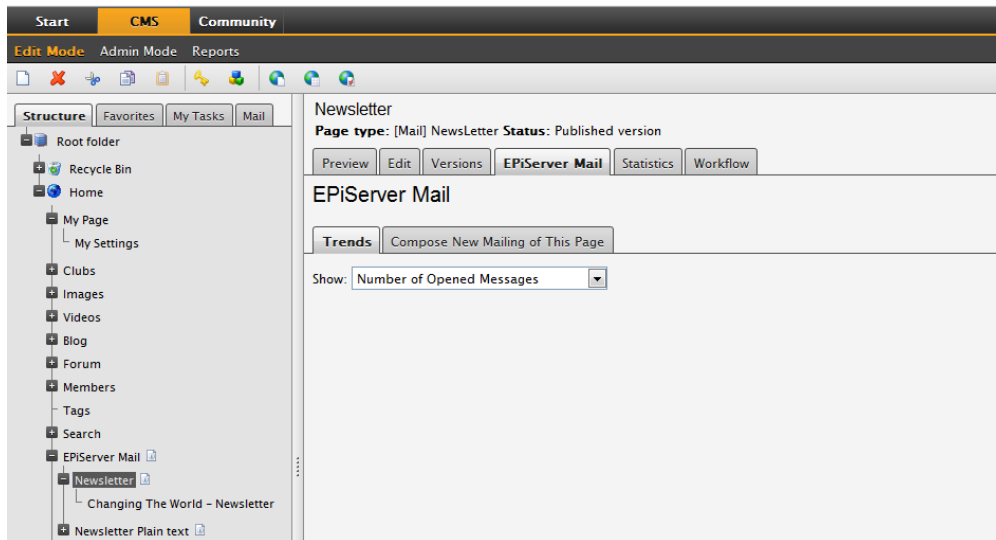
Unsubscribe from mailing

You have reached this page by clicking on an unsubscription link in a mailing you would like to be excluded from in the future. Here below you have two options; being unsubscribed from a mailing category or from all future mailings from this site. Unsubscribing from the category will exclude you from all future mailings from that specific category, but not from other mailings from this site that might still be interesting to you. If you know that you will not be interested in any mailings from this site in the future, you can choose the second option.

- Unsubscribe me from the mailing category Monthly Tech News**
Choose this option if you want to unsubscribe from the mailing category.
- Unsubscribe me from all mailings from the global site**
Choose this option if you want to unsubscribe from all mailings from the site.

Message Statistics

In the integrated EPiServer CMS and Mail, you will have a statistic feature which provides an overview of message statistics for subpages to a parent page. The statistics are presented graphically and provides a number of different views. The statistics overview can be found by entering a page of the type **Newsletter**, click the **EPiServer Mail** tab and then clicking a tab named **Trends**.



The **Trends** tab has the following options for displaying message statistics over time:

- **Number of Opened Messages;** displays the number of messages that have been opened. A message is considered opened when a user has opened the message in an e-mail client and downloaded the pictures (depends on the e-mail client used).
- **Number of Unique Opened Messages;** displays the number of messages that have been opened by a specific user identified by the recipient ID. This information is used when generating the **Export Clicks** statistics in the **Link Report** (under the **Mail** tab), for sent mailings.
- **Number of Link Clicks;** displays the number of times users have clicked on links in the message. This information can also be monitored for specific links in each e-mail under **Show Link Statistics** (under the **Mail** tab) for sent mailings.
- **Number of Bounced Messages;** displays the number of bounced messages. This information can also be graphically monitored for each message under the **Mail** tab, **Sent Mailings/Delivery Report** tab.
- **Number of Recipients;** displays the number of recipients that have received the message.

Account Statistics

The **Account Statistics** menu option allows you to gain control of your mailing costs. In the **Price List** section, the prices for the different levels of e-mails per month are shown, and these may differ depending on EPiServer Mail license type. In the **Mailing statistics for the last three months** section, your past mailing statistics are shown, as number of delivered messages per month. (It will be shown as four rows/months, as the total number of days during three calendar months will span over a four month period).

The screenshot displays the EPiServer Mail administration interface. The top navigation bar includes 'Start', 'CMS', and 'Community'. Below this, there are tabs for 'Edit Mode', 'Admin Mode', and 'Reports'. The left sidebar shows a tree view under 'EPiServer Mail' with sub-items: 'New Mailing', 'Sent Mailings', 'Manage Recipients', 'Account Statistics', and 'Manage Sections'. The main content area is titled 'Account Statistics' and contains two sections:

Price List

Level	Price
0 - 50 000 e-mails per month	€200
50 001 - 100 000 e-mails per month	€360
100 001 - 200 000 e-mails per month	€620
200 001 - 300 000 e-mails per month	€770
300 001 - 400 000 e-mails per month	€820
400 001 - 500 000 e-mails per month	€870
500 001 - 650 000 e-mails per month	€1000
650 001 - 800 000 e-mails per month	€1100
800 001 - 1 000 000 e-mails per month	€1400
> 1 000 000 e-mails per month, per e-mail	€0.001

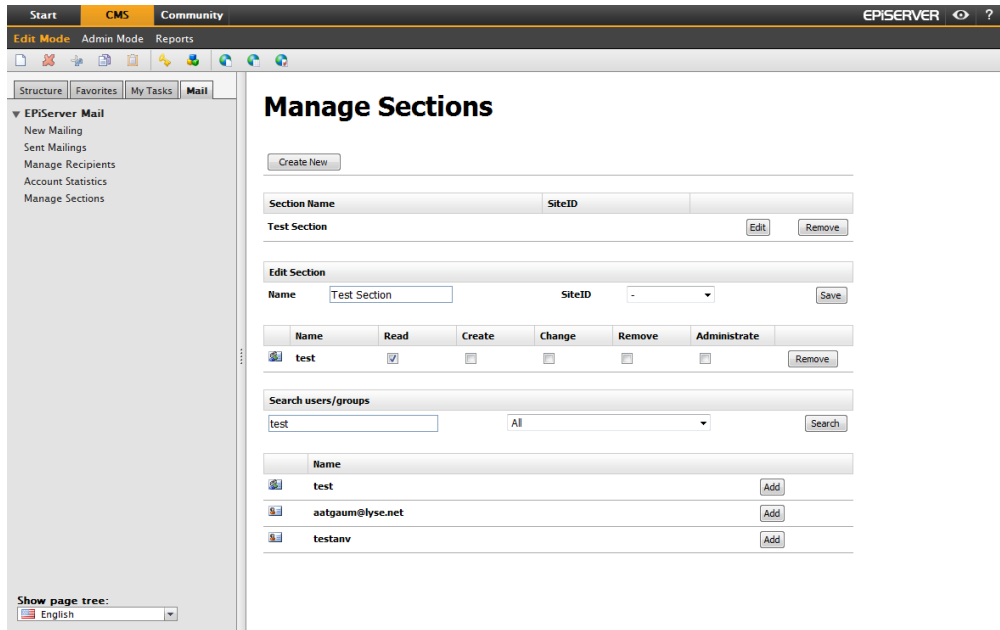
Mailing statistics for the last three months

Month	Delivered messages
2010 / 9	0
2010 / 10	11
2010 / 11	26
2010 / 12	3
Total in this period	40

At the bottom left, there is a 'Show page tree:' section with a language dropdown menu set to 'English'.

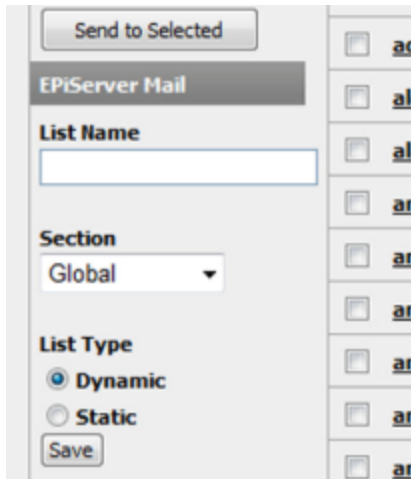
Manage Sections

The recipient lists defined in EPiServer Mail can be set up to be used by different users. For instance, if you have a recipient list that is to be used only by a limited number of users, this can be accomplished by the use of **Sections** in EPiServer Mail. You add a section to enable certain sections of EPiServer Mail for the user, including one or many recipient lists. To create a new section, click **Create New** button, and in the **Edit Section** group box, enter the name of the section. In the **Search users/groups** group box, search for the users/groups to be added to this section, and check the check boxes for the access rights they should have.



EpiServer Community Integration

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.



The screenshot shows a web interface for configuring an email list. At the top left is a button labeled "Send to Selected". Below it is a section titled "EpiServer Mail" with a sub-section "List Name" containing an empty text input field. Underneath is a "Section" dropdown menu currently set to "Global". The "List Type" section has two radio buttons: "Dynamic" (which is selected) and "Static". A "Save" button is located at the bottom of this configuration panel. To the right of the configuration panel is a vertical list of checkboxes, each followed by a partial email address starting with "a".

