Mail User Guide
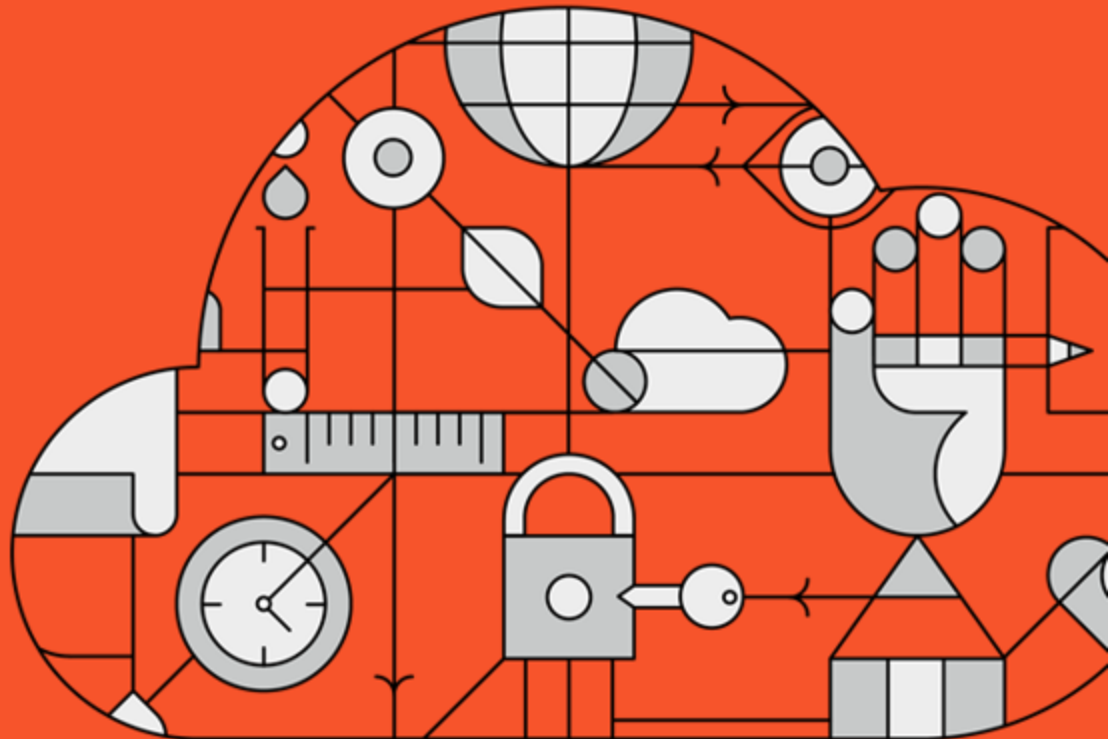
Personalization Portal - Episerver Reach

Mail User Guide Personalization Portal - Episerver Reach

v04

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Reach Overview of Mail

This document shows how to create and configure Mail recommendations widgets and generate the HTML links to insert into your email campaigns.

Mail lets you provide each and every recipient of your email communications with dynamically generated, personalized product recommendations in the body of the email. These recommendations are based on the individual browsing behavior of each user on your web site, so that each recipient of an email is sent personalized product suggestions that are singularly relevant to them.

Mail dramatically increases click-through-rates and engagement with email campaigns to drive more revenue through the email channel. Configuration is simple with numerous strategy, filter and fine-tuning options available.

You can use Mail in any email campaign: in marketing campaigns, and in transactional and automated triggered emails such as abandoned basket, welcome messages, order confirmation, order dispatched messages, and so on.

Mail enriches an existing or new campaign by adding in personalized product suggestions to the email template. Also, marketers can construct the entire email around personalized product suggestions for the ultimate 1-to-1 email communication.

The Mail tool is completely ESP-agnostic and there is no complex integration required.

Episerver tracking and Mail work by assigning a unique Customer User ID (CUID) to any device the user is using to connect to your website. When a user identifies him- or herself on the site—by logging in, placing an order or otherwise providing an email address, or by clicking a Mail product recommendation in an email they received—Episerver automatically converts the CUID into a KUID (Known User ID), linking behavior tracked on the device to the user's email address. This enables instant delivery of product suggestions according to the strategies selected, and based on the individual user's behavior.

If a user connects on another device, Episerver automatically connects the different CUIDs to a single KUID associated with that email address. In this way, personalization works consistently across the devices with which a user engages.

Mail product recommendations are delivered at the point of opening the email as two images:

» The actual product image from your own image library.
» The product information image, which shows text, such as the product title and price.

You simply add Episerver HTML links to your campaign, which generate the images within the campaign.

Accessing Mail

You can access Mail through the web-based Episerver Personalization Portal.

1. Log in to the Personalization Portal with your credentials. If you do not have your login details, contact developersupport@episerver.com.
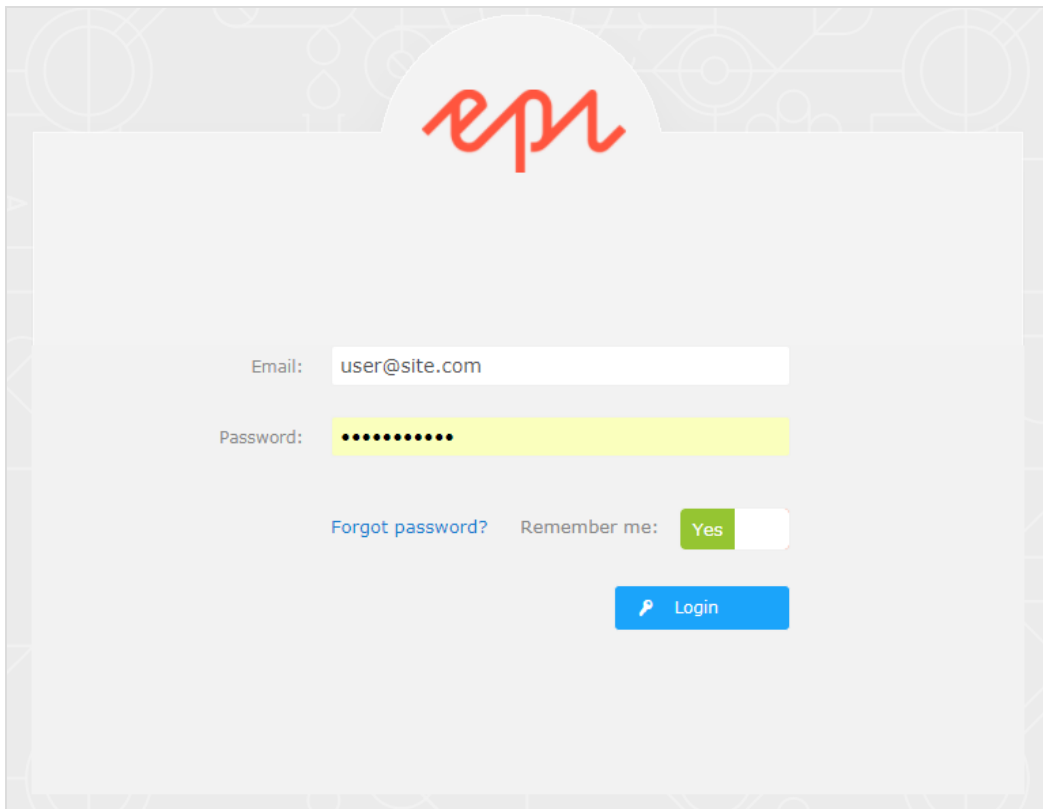
2. Click on the **Mail** tab in the navigation bar. In the Mail interface, you can create new campaigns, and view or edit the campaigns that you have already set up.

» **Edit**. Click **Edit** (✐) or on a campaign name to open the configuration page for that campaign so you can edit it.

» **Status**. Click **Activate it** (▶) to switch on a campaign or **Pause it** (❚❚) to switch off a campaign.

» **Delete**. Click **Delete** (🗑) to delete a campaign deletes that campaign. A confirmation box appears.

» **Copy**. Click **Copy** (📋) to create a duplicate of an existing campaign. Then click **Edit** (✐) for the new campaign to make changes to it.

Setting up a Mail campaign

To create a new campaign, you can either click **Create a new campaign** from the Mail overview screen, or select the **Mail > New campaign** tab. The campaign editing screen appears. There are three main steps in the set-up process:

>> Styling the product information image
>> Configuring recommendation strategies
>> Previewing and generating the recommendations code

Styling the product information image

The **Style editor** tab lets you configure the way the product information image appears for email recommendations. Your modifications are displayed in the Preview section.

>> **Campaign**. The name of your Mail campaign.
>> **Image**. Modify the dimensions (pixels) and background color (hex values) of the product information image.

> **Note**: The size of the actual product image will not change because that image is delivered with the same size as it is provided from your system to Episerver in the product catalog feed.

» The **Text styles** section defines the font attributes:

  » **Title**. Modify the font attributes and alignment of the product title.

  » **Price**. Modify the font attributes and alignment of the product price.

Click **Show advanced settings** to edit HTML and CSS for the image. You can edit other elements, such as displaying *Was* prices or product ratings. The product information image is rendered in a similar way that a browser does, so you can use standard HTML and CSS.

Click **Need help** ❓ for information about the syntax of variables and logical operations.
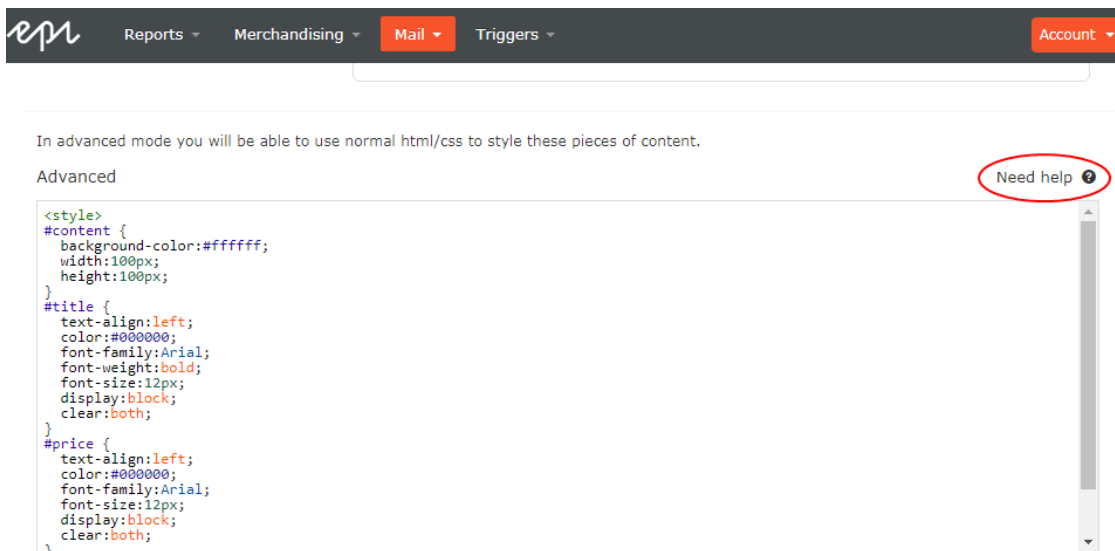
Select the **Configuration** tab to proceed to the next step.

Configuring recommendation strategies

In the **Configuration** tab, select how many products you want to appear in the email campaign, specify localization settings, add third-party tracking code, and configure the recommendation strategies.

1. Set the number of products you want to display in the campaign in the **Number of products** field.
2. If your site is multi-lingual and is being tracked under a single account in the Episerver Personalization Portal, select the appropriate locale for the email campaign. The **Locale** field refers to the language to be used in the text of the product recommendations.
3. If you want to add third-party analytics code to the product recommendations to track their performance in tools like Google Analytics, Coremetrics, Omniture and so on, add the tracking parameter generated by your preferred analytics tool in the **Tracking code** field.
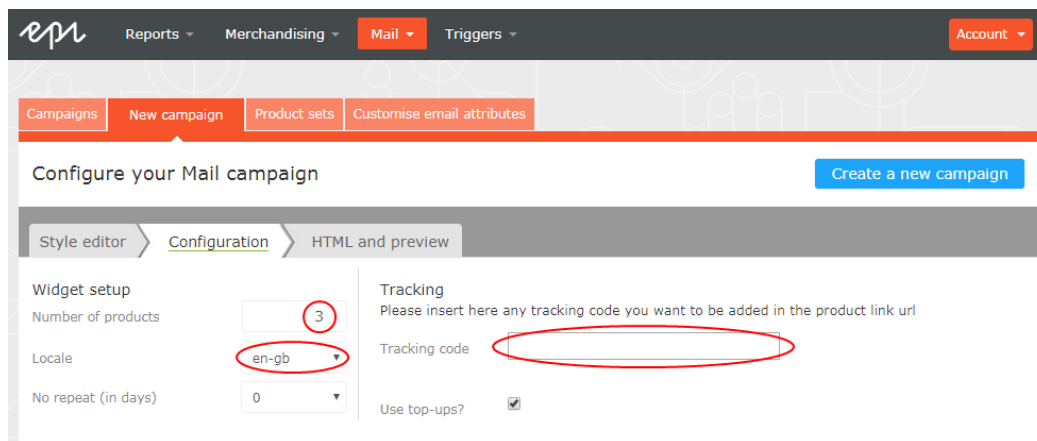
The visual editor displays the number of positions you have chosen to set up.

In each of the positions, you can choose one or more different strategies available. The strategies in each position are independent of each other. So, you can apply a different strategy or combination of strategies to each position.

You can choose a strategy by clicking in the **Strategy** field and scrolling through the drop-down list. (You can start typing in the name of a strategy to filter the list.) Once you have found the strategy, click on its name to add it to the product position.
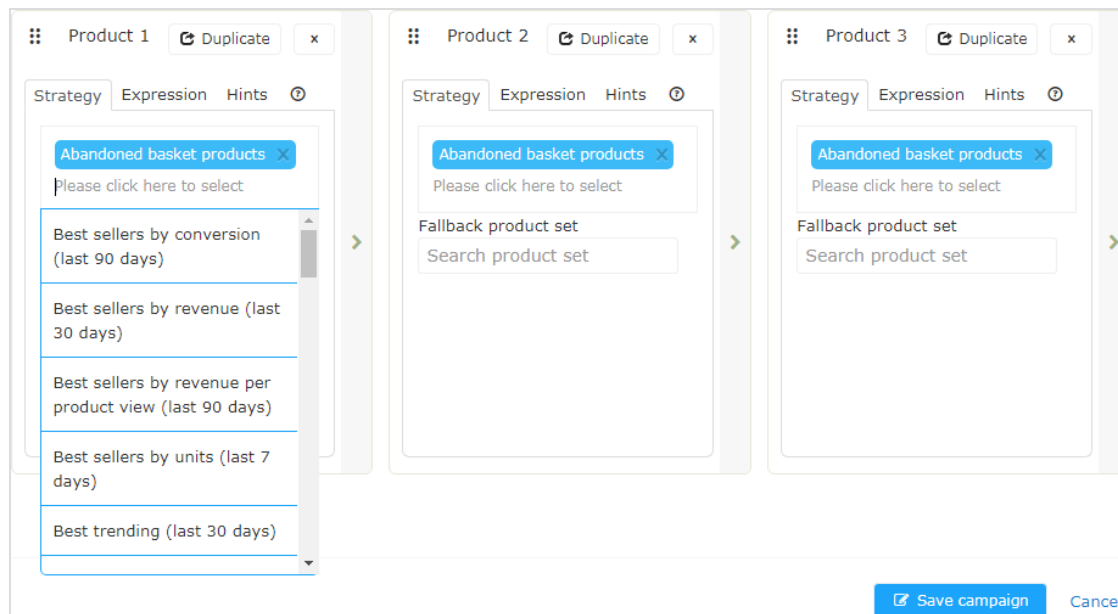
You can stack strategies, one after the other, for each position, so that the system finds products that match the first strategy in the top line first. If that strategy returns no products, the next strategy down the stack is tried, and so on, until the position is filled. For example a strategy stack could look like this:
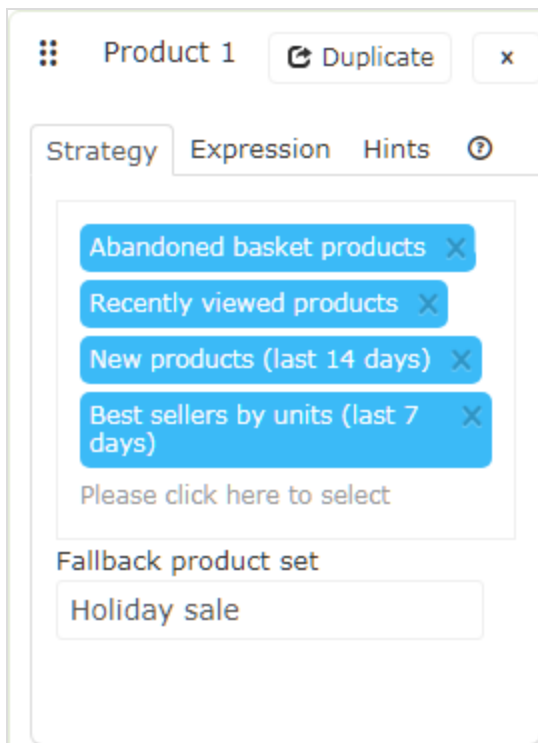
In this example, the system looks first for products that are abandoned by the user (based on the email address of the recipient, having browsed or purchased on the site using the same email address). If it does not find anything, it goes to the second strategy line and looks for recently viewed products. If it does not find anything there, it goes to new products (recently added to the site) from the past 14 days, and so on, until a matching product is found. The strategy also has a fallback product set specified. See Creating a product set for information about product sets.

You can reorder the stack of strategies by dragging and dropping a strategy up or down in the list.

If you want to use the same strategy stack in another product position, you can click **Duplicate** in the top right corner of the configured product position, to copy it into the next position. This adds another product position to the campaign with an identical strategy stack.

You can reorder product positions you created by clicking on the button in the top left and dragging them into the desired order. To delete a product position, click **X** in the top right corner.

To ensure that there is never a blank position in the email campaign, you can do either of the following actions:

» Select a Fallback product set, which contains a list of pre-selected products that can appear in the recommendations if none of the strategies return a result.

» Select the **Use top-ups** checkbox, which ensures that the system displays a best seller from the last 7 days, if none of the strategies in the stack return a result.

> **Note**: Fallback product sets and top-ups will not follow any hints or expressions applied to the product position.

Personalized and Merchandised recommendation strategies

There are over 30 different Mail Strategies available to use in Mail, and you can deploy these singularly or in combination.

Personalized strategies are determined by the fact that their output depends on the association of personal web behavior to an individual email address. So, for example, recently viewed and abandoned basket are clearly linked to actions that an individual has completed on site and are therefore personalized strategies. Merchandised strategies on the other hand relate specifically and only to products. Best sellers, best trending, and new products are merchandised strategies where it is not relevant if the individual email recipient has already seen the products or not. The following table shows example strategies.

Personalized	Merchandised
Abandoned basket products	Best trending (last 30 days)
Cross-sells from previous purchases and views	Best sellers by units (last 7 days)
Newly discounted products from viewing history	Best sellers by revenue (last 30 days)
Popular co-purchased products	New products (last 7/14/30 days)
Recently viewed products	

When you first start to use Mail, you should adopt a combination of personalized strategies and merchandised strategies to ensure that all emails that are sent are optimized to generate the best sales returns. Over time, more and more emails are personalized as the system associates web behavior to further email addresses.

The nature of what is being sold or offered on a site also is an important consideration because this has a direct bearing on which strategies it is best to deploy. A fashion site, for example, will have completely different buying behavior to a site selling building supplies. A fashion site retailer may want to focus strategies on as much personalization as possible, while a building supplies retailer may want to focus more on the merchandised strategies available that are devised based on the crowd behavior captured.

Of the 30+ strategies that may be deployed for any position, client experience indicates that there is no single best answer for which stack of strategies generates the most engagement because this varies on a client-by-client basis. Episerver can offer expertise and campaign-specific advice dependent on the mail campaign you are running.

To see a full list of strategies, click **Help** ? in any product position to open the Help section.

Filtering strategy results using Expressions and Hints

To narrow and restrict the recommended products in your email campaigns, add rules in the **Expression** and **Hints** sections for each product position. These rules work in conjunction with the configured recommendation strategies by filtering the strategy output using the specified parameters.

Expressions are explicit rules that the recommended products must match to appear to the email recipient. Expressions ensure that certain product attributes are included in the selection. For example, if you were to use the **Recently viewed** strategy, you could specify an expression to show only those products that were recently viewed and are from a specific brand or category you want to push. To use a certain product attribute in Expressions, pass the attribute and value to Episerver in the product catalog feeds imported for your site.

While expressions let you filter by a specific product attribute and its value, and are configured for each product position individually, you can use **Hints** as a broader rule, which also takes into account what other products are recommended in the same campaign. Again, using the **Recently viewed** strategy as an example, you may want to exclude items that were previously purchased. You can do this with a Hint (but not using an expression as recent purchase is not a product attribute provided in product catalog feeds).

Where there is a requirement to implement specific strategies at a detailed product or category level, contact your Episerver Customer Success manager or email developersupport@episerver.com for help and advice.

Adding an expression

To add an **Expression** to an individual product position:

1. Select the **Expression** tab for the desired position.
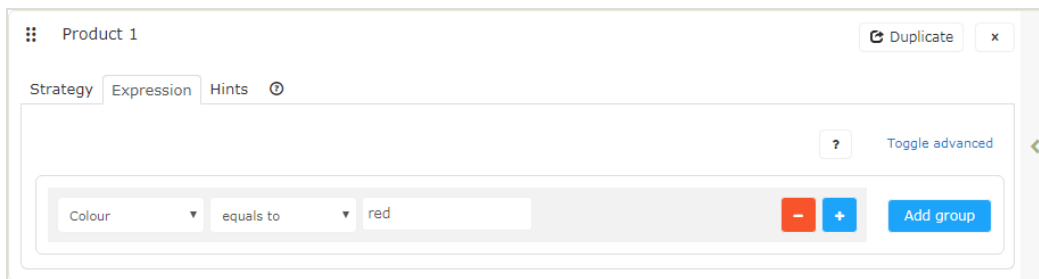
2. Click the first drop-down menu to select the attribute that you want in the rule. A list appears of all product attributes that Episerver has available for your products (based on the product catalog feed, plus a few attributes the system creates by default). If you do not see the attribute that you want, you can add it to your product catalog feed. Contact developersupport@episerver.com if you have questions about this.
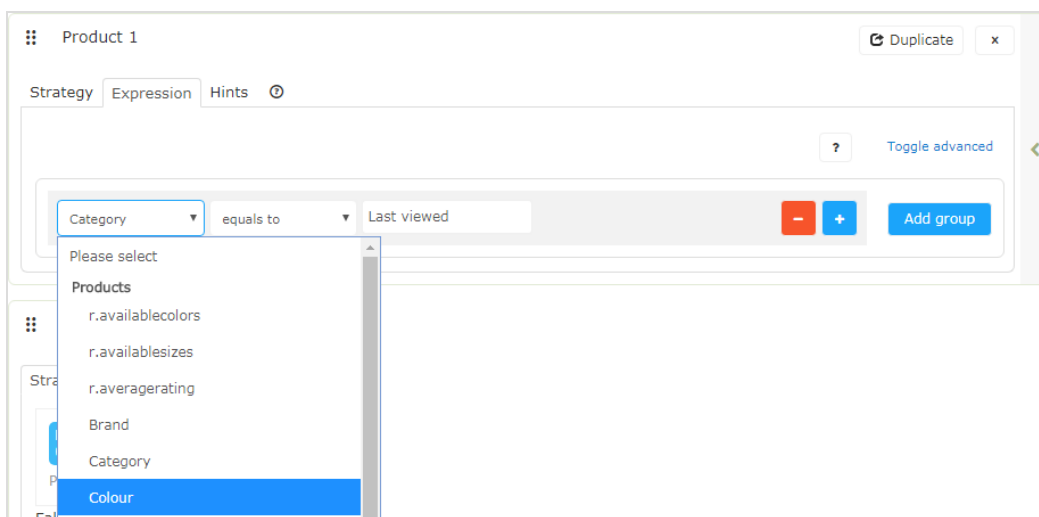
3. Click an attribute in the list, such as **color**.
4. Select the condition you want in your rule.
   - » For attributes that have a text value, such as *Color* or *Brand*, select **equals to** or **NOT equals to**.
   - » For attributes with a numeric value, such as *Sale price* or *Unit price*, you also can use comparison operators like **greater than** or **less than**.
5. In the text field on the right, enter the value of the attribute that is evaluated in this rule. For most attributes you will see a drop-down list with possible values when you click the text field. Also, you can start typing in the box to filter the results. To choose a value, click it.

> **Note**: For numeric values (such as prices) you will not see a pre-populated list and you will need to enter the value manually.
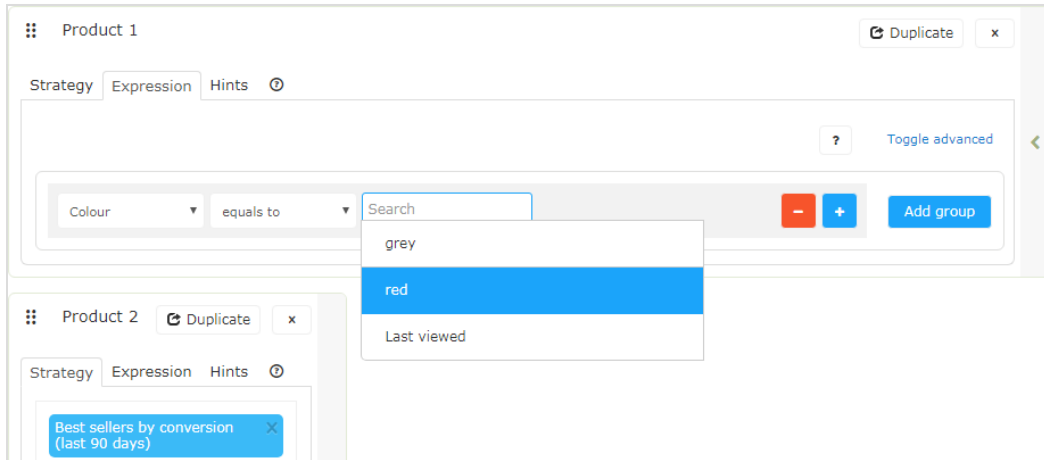
6. You can add multiple rules for the same position by clicking **Add group** or plus (**+**). When using multiple rules, you can choose to apply one or more of them to the product position, by setting the **AND** or **OR** operator.

    To remove a rule, click minus (**-**) next to it.

Adding a hint

To add a **Hint** to an individual product position:

1. Select the **Hints** tab for the desired position.
2. In the available drop-down menus select the hint you want to apply. You can apply up to two

hints for each product.
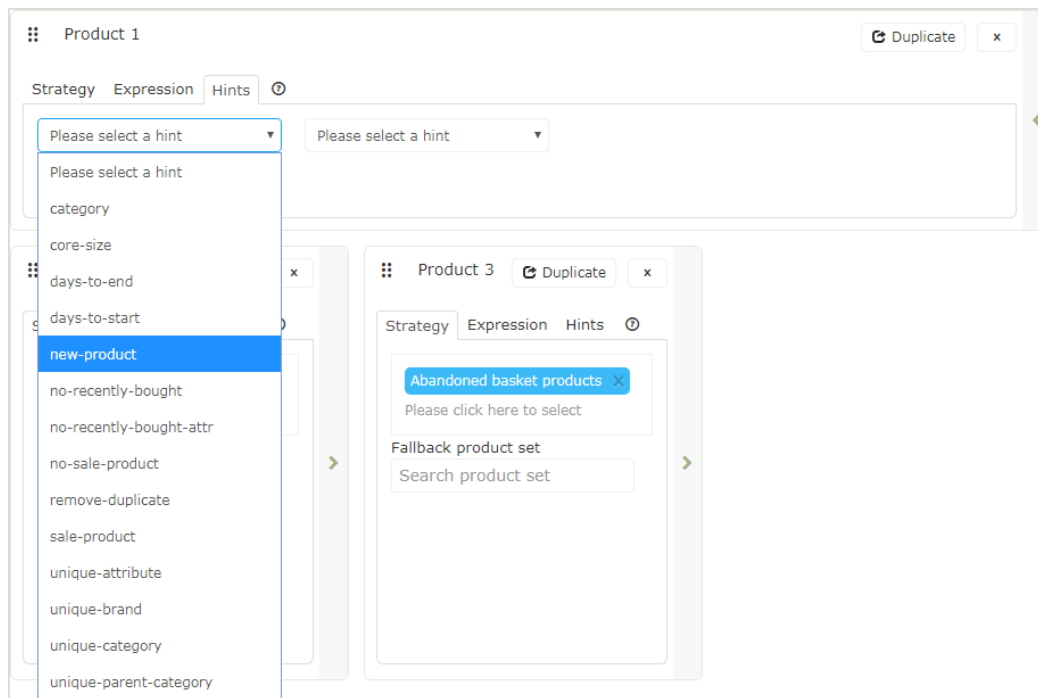
You can use Hints and Expressions in combination, but be aware that the more you add, the more restricted the range of products to choose from becomes in terms of generating useful recommendations. If there is something you are trying to achieve but are unsure of the impact it will have, contact your Customer Success Manager or email developersupport@episerver.com to discuss the possibilities.

When you are happy with the configuration of all the products in the campaign, click **Save campaign** at the bottom of the page. Select the **HTML and preview** tab to proceed to the next step.

Previewing and generating the recommendations code

The **HTML and preview** tab lets you generate the code that is added to your email template, and lets you preview the output of the mail recommendations widget.

Generating the HTML code to add to your template

1. Select your ESP from the drop-down list to populate the fields for the **Variables**. If you do not see your ESP, select **Custom** and manually insert your ESP email variable in the **Email address** variable field. This information is available from your ESP, so contact your ESP account manager or support team, if you are unsure what the correct variable is. (Depending on your client setup, additional fields may be visible for other variables; for example, if you have Triggers and have used a trigger strategy in your Mail campaign, a **Trigger fire ID** variable field

will be present.)

Note: The email address variable is required to let Episerver identify the user by their email to serve personalized recommendations that are specific to the user. Upon sending an email, your ESP populates the variable in the link with the recipient's email address. If the variable is not present or is incorrect, Episerver is not informed of the user's email address, and therefore cannot personalize the recommendations.
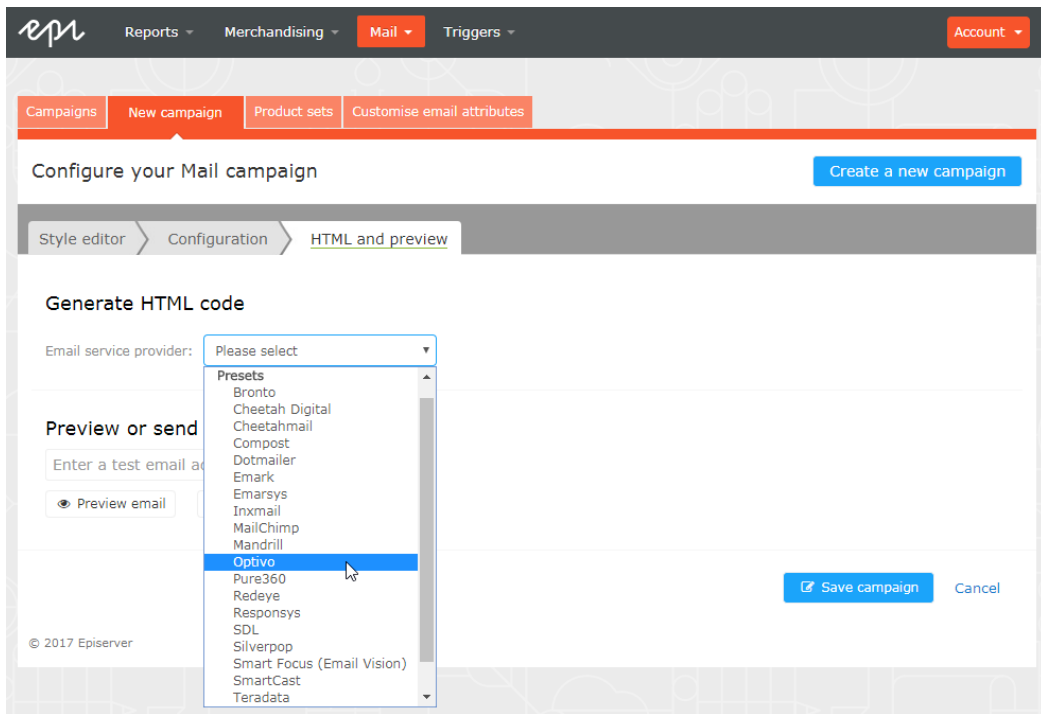
2. After the variable is populated, click **Generate code**.The generated HTML code appears.

3. Copy and paste the HTML code into your email template to retrieve recommendations.

   The generated HTML code is annotated to clearly show the links for each product recommendation. As each recommendation consists of two images (the product image and the product information image), each of these is commented so you have the flexibility to use the images in the way you want to best fit your template design.

The generated code does not include any other formatting so you will need to add the appropriate HTML and CSS in your template to style the recommendations, for example adding them to a table or resizing the product images.

Previewing your campaign

To preview the output of the configuration you have set up, you can choose to:

» Preview the email recommendations within the Personalization Portal itself (showing recommendations below the **Preview email** button).

» Send a test email to your email address to view the recommendations within a basic email template. You must enter your email address in the field above the **Send test email** button beforehand.

When you preview the recommendations in Personalization Portal, a sample output appears for the email address you entered. You can try out different email addresses to see how the recommendations may look for different users.

You can view more information about the recommended products shown in the preview by clicking **Detailed information** beneath the recommendations. This opens a new browser tab/window where you can view detailed information for each recommended product, and the strategy that generated the recommendation.

Widget : Campaign	
Recommendations	
refCode: ████	
createdDate	Sun Jan 22 04:12:06 GMT 2017
Title	██████ Bed Linen Collection
Categories	Sale>Bedroom , Offers>Bedroom , Bedroom>Pillowcases
Attributes	pricerange = cheap agegroup = senior type = bedroom discount = true type = sale recommendmaster = n type = offers fabric = cotton linen twctype = pillowcase ismaster = n browsable = y detail = linen border emailrecommend = n width = 19.5 height = 0.7 length = 27 weight = 0.24 collectplus = y masters = ██████-bed-linen-collection pcat = ██████-bed-linen-collection/p originalurl = http://█████████████████bed-linen-collection stockavailable = 1000.0 defaultcategory = bedroom>pillowcases
Prices	sale: 15.0 GBP unit: 25.0 GBP
Generatio Strategy	Best trending (last 30 days)
Algorithm	EmergingProduct
Image	
Debug	1 : trying at position 0 (-) 2 : applies for hint : sale-product : (sale-product) 3 : Applies for filter (HintsFilter) 4 : Applies for filter (MinStockFilter(minStock=1)) 5 : Applies for filter (ExclusionsFilter) 6 : Applies for filter (DuplicationFilter) 7 : apply for expression ((████████████████████r.category<>'Clothing>Swimwear')) 8 : Applies for filter (ExpressionFilter) 9 : Applies for filter (MinStockForVariantFilter(minStock=1))

If you have any questions regarding how to use the Mail tool, contact your Customer Success Manager or email developersupport@episerver.com.

Mail Strategies

The following tables shows Mail strategies.

Name	Description
Abandoned basket products	Shows products that have been added to the basket but not purchased. Only baskets abandoned within the last 90 days and products currently available are considered.
Best sellers by conversion (last 90 days)	Show best sellers based on conversion rate from the last 90 days, and what categories the user has viewed.
Best sellers by revenue (last 30 days)	Show products that generated the most revenue on site in the last 30 days. This strategy also takes categories into account, i.e. it gives bias to products that have sold well and are in the same category that the user has most interacted with.
Best sellers by revenue per product view (last 90 days)	Show products that generated the most revenue per numbers of views in the last 90 days. This strategy also takes categories into account, i.e. it gives bias to products that have sold well and are in the same category that the user has most interacted with.
Best sellers by units (last 7 days)	Show best sellers based on number of products sold in the last 7 days.
Best trending (last 30 days)	Show products that are gaining popularity, i.e. whose unit sales are growing the most in the last 30 days.
Best trending based on previous purchases and views	Show products that are gaining popularity, i.e. whose unit sales are growing the most, based on the customer's previously viewed products and purchase history.
Co-purchased products based on previous purchases	Show products that other customers have also ordered when purchasing the same product as the user, and that are in any category the customer has purchased from.
Co-purchased products based on wishlist	Show products bought together with products the user has in their wishlist.

Name	Description
Co-viewed products based on wishlist	Show products viewed together with products the user has in their wishlist.
Cross-sells from previous purchases and views	Show products bought together with products the user has bought and viewed in the past.
New Products (last 7/14/30 days)	Show products recently added to the site (in the last 7, 14 or 30 days).
New products from purchased categories (last 120 days)	Show new products from categories that the user has previously purchased from (in the last 120 days).
Newly discounted products based on viewing history	Show recently discounted products related to products that the user has previously viewed.
Newly discounted products from viewing history	Show recently discounted products that the user has previously viewed.
Popular co-purchased products	Show popular items based on the user's purchased products (biased towards the most recently bought product).
Popular products based on previous purchases and views	Show popular items from categories the user recently purchased from. If not enough are found from purchased categories, it shows popular products from categories that the user recently viewed.
Popular products based on recent views	Show popular products based on user's recently viewed products.
Popular products from categories related to previous purchases	Show popular items from categories related to categories that the user purchased from.

Name	Description
Popular products from co-purchased and purchased categories	Show products that other customers have bought together with the same product as the user, and are in the same or related category that the customer has purchased from.
Popular products from co-purchased categories	Show products that other customers have bought together with the same product as the user, and are in a related category to what the customer has purchased from.
Products from daily trigger campaigns	Used only with Triggers. Show products from daily trigger campaigns, such as Targeted discounts, High product interest, Post purchase, Low-in-stock abandoned-basket.
Products from in-session trigger campaigns	Used only with Triggers. Show products from in-session trigger campaigns, such as Abandoned basket, Abandoned browse, Abandoned checkout.
Recently pur-chased products	Show products the user has purchased, the most recent first.
Recently viewed products	Show products the user has recently viewed.
Recommendations based on abandoned basket	Show related products based on the user's abandoned basket items (biased towards the most recently abandoned product).
Recommendations based on the customer's popular views	Show popular products from categories which the user has browsed the most.
Recommendations based on daily trig-ger campaigns	Used only with Triggers. Show related products based on the daily trigger used, such as Targeted discounts, High product interest, Post purchase, Low-in-stock abandoned-basket.
Recommendations based on in-session trigger campaigns	Used only with Triggers. Show related products based on the in-session trigger used, such as Abandoned basket, Abandoned browse, or Abandoned checkout for the current session.
Recommendations based on recent	Show popular items based on products the user has added to basket.

Name	Description
basket additions	
Recommendations based on specified product refCodes	Show recommendations based on what other customers purchased or viewed with the specified products. To use this strategy, a client needs to fill the value of the **refCode** variable in Mail recommendations links with product refCodes (for example, from a customer's order) and then the recommendations returned are based on those refCodes.
Recommendations from the category specified in Hints	Show products from a particular category, which needs to be specified in the Hints section using the hint *category*.

Example Mail campaigns

The following section lists examples of Mail strategy stacks to use in various types of email campaigns.

BAU newsletter

Selection of personalized products for use in BAU newsletters:

- » Abandoned basket products
- » Recently viewed products
- » Recommendations based on abandoned basket
- » Popular products based on recent views
- » Cross-sells from previous purchases and views
- » Popular products based on previous purchases and views
- » Best sellers by conversion (last 90 days)
- » Other merchandising strategies or Fallback product set

Welcome email

Selection of personalized products for use in Welcome emails:

- » Cross-sells from previous purchases and views
- » Popular products based on previous purchases and views
- » Recently viewed products
- » Newly discounted products from viewing history
- » Abandoned basket products
- » Recommendations based on abandoned basket
- » Best sellers by revenue per product view (last 90 days)
- » Other merchandising strategies or Fallback product set

Abandoned basket

Selection of personalized recommended products for use in Abandoned Basket emails:

- » Recommendations based on abandoned basket
- » Cross-sells from previous purchases and views
- » Popular co-purchased products
- » Newly discounted products from viewing history
- » Popular products from categories related to previous purchases
- » Recently viewed products
- » Best sellers by conversion (last 90 days)

Order update/cross sell

Selection of personalized products for use in order updates or cross-sell emails sent to users who have purchased on the site:

» Cross-sells from previous purchases and views
» Popular co-purchased products
» Newly discounted products from viewing history
» Popular products based on previous purchases and views
» Co-purchased products based on previous purchases
» Popular products from categories related to previous purchases

Other campaigns and high-level strategy suggestions

» **Marketing emails & newsletters**
  » **Weekly/monthly newsletters**. Show a selection of products to the user based on the following strategies: Abandoned basket products, Recently viewed products, Recommendations based on abandoned basket, Cross-sells from previous purchases and views, and Popular products based on previous purchases and views. If the user is new to the site (i.e. they don't have enough behavior tracked by Episerver), they will be presented with best trending items on the site and best sellers based on crowd behavior.
  » **Announcement emails**
    » **New arrivals**. Similar to the strategies above but boosting products recently added to the site (use the hint new-product).
    » **Sale**. Presenting only items on sale. A selection of products that a user has viewed on the site and that since have been discounted, items on sale related to the user's browsing and purchasing behavior, Abandoned basket products or Recommendations based on abandoned basket. If the user is new, they will be presented with popular products on sale and best sellers on the site based on units, revenue, conversion and revenue per product view.
  » **Events/competition emails**. Show a selection of popular products from the user's favorite categories, Popular co-purchased products, Abandoned basket products and Recommendations based on abandoned basket, or Best trending products in the user's favorite categories. If the user is new, they will be presented with best sellers and new products on site.
  » **Loyalty/reward newsletters**. Show cross-sells to previously viewed and purchased products, popular items from favorite categories, Abandoned basket products and Recommendations based on abandoned basket, Recently viewed products, or best sellers in favorite categories.

» **Transactional and system emails**

» **Registration /account creation confirmation emails**. Show cross-sells to previously viewed and purchased products, Popular items from viewed and purchased categories, Recently viewed products, Abandoned basket products, Newly discounted products from viewing history, or Best trending products in favorite categories. If the user is new, they will be presented with a mix of Best trending and Best selling items.

» **Order confirmation**. Show cross-sells to the purchased items, Popular co-purchased products, or Recommendations based on abandoned basket.

» **Order dispatched**. Show cross-sells to the purchased items, Popular co-purchased products, or Recommendations based on abandoned basket.

» **Abandoned basket/browse**. Show recommendations based on the abandoned products and the user's previous buying and viewing behavior.

Creating a product set

You can group products that you want to promote or sell. You can use product sets in expressions. To create a product set:

1. Select the **Product sets** tab.
2. Click **Create a product set**. A pane appears.
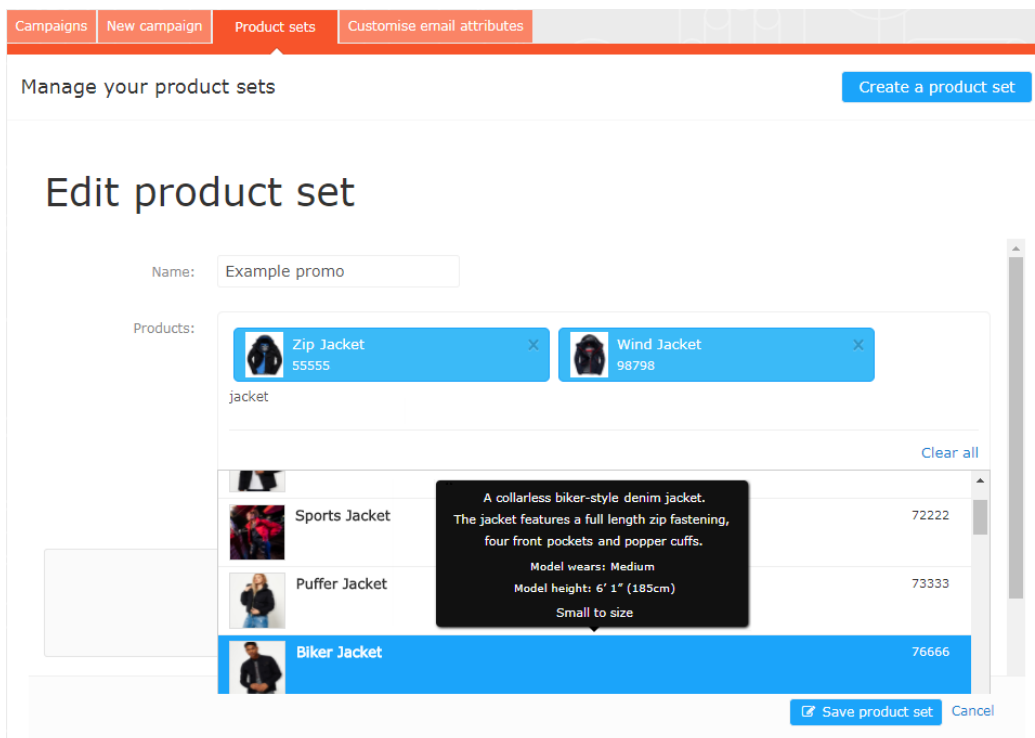
3. Enter a name for the product set, such as *Holiday Sale*.
4. You can add products to a set in the following ways:
    » Type in the name or refCode of a product in the **Products** field. A list of results will appear. Click on a product to add it.
    » Type a space in the **Products** field and available products appear for you to select by clicking on each product.
    » Drag and drop a comma-separated values (.csv) file (or click and select the file) in the **Upload a CSV file** space.

> Product sets can contain up to 200 products.

5. Click **Save product set**. Your new product set appears in the list, where you can edit, delete, and copy the sets further.