# EPiSERVER MAIL

Release 4.4.1

# User Guide

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EPiSERVER

User Guide for EPiServer Mail 4.4.1
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# Introduction

## What is 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 Web site, 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 Web site.

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

## How Does EPiServer Mail Work?

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 Meta data 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.

### Glossary

**Mailing** - A *mailing* is an e-mail sent at one time to multiple addresses by a sender.

**Message** - A *message* is an e-mail message sent to one address.

**Recipient** - A *recipient* is the e-mail address receiving the mailing.

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## Further Reference

The following manuals can be found on EPiServer World, http://world.episerver.com, for further reference.

- EPiServer CMS Editor's Manual
- EPIServer CMS Administrator's Manual
- EPiServer Community User Manual
- EPiServer Mail Developer's Guide

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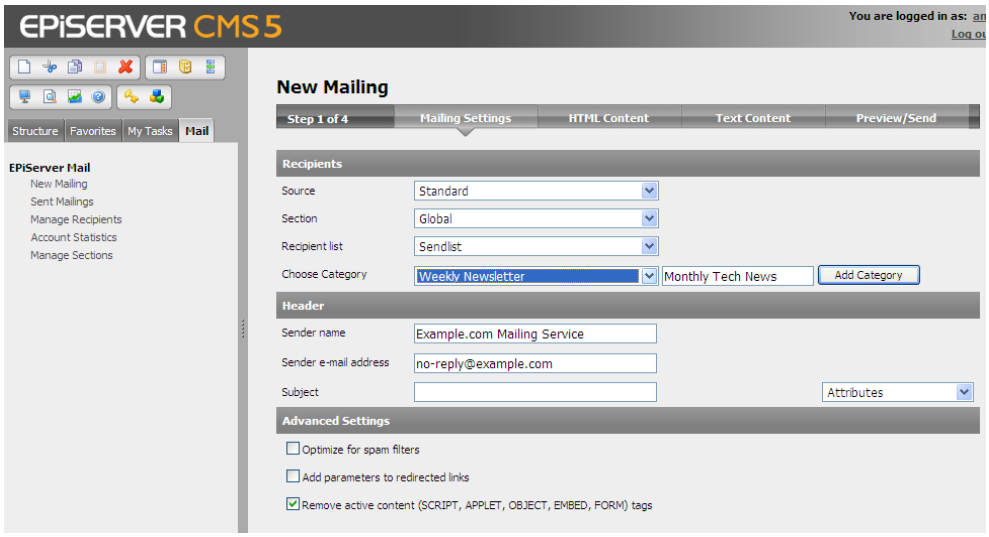
# Getting Started

## Main View

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

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# Send a New Mailing

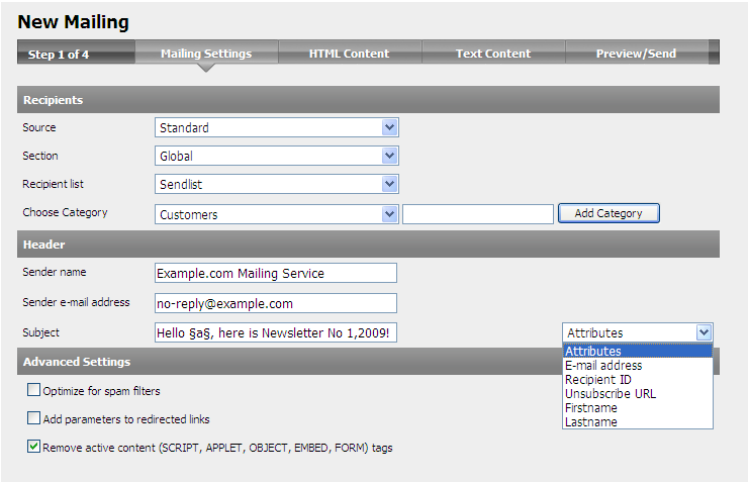
It is easy to compose and distribute mailings to your target group from the **New Mailing** window, which contains four tabs with settings that need to be entered before you can distribute your mailing.

## Message Settings Tab

1. In the **Recipients** group box, select where the recipient list should come from and which recipient list to use. Read more about this under *Managing Recipients* on page 16.
2. 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* on page 11.
3. Select which section the mailing should be created for. New sections can be created by clicking **Manage Sections** from the left pane.
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:

   - **E-mail address**; displays the recipients' e-mail address in the subject field.
   - **Recipient ID**; displays the recipients' ID in the subject field.
   - **Unsubscribe URL**; displays an unsubscribe link in the subject field.
   - **Firstname**; displays the recipients' first name in the subject field.
   - **Lastname;** displays the recipients' 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.




6. 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.
7. 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.
8. The **Remove active content tags** check box allows you to select whether you want EPiServer Mail to remove any SCRIPT, APPLET, OBJECT and EMBED tags in the HTML

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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.

9. Continue with the creation of the mailing by clicking the **HTML Content** tab.

# HTML Content Tab

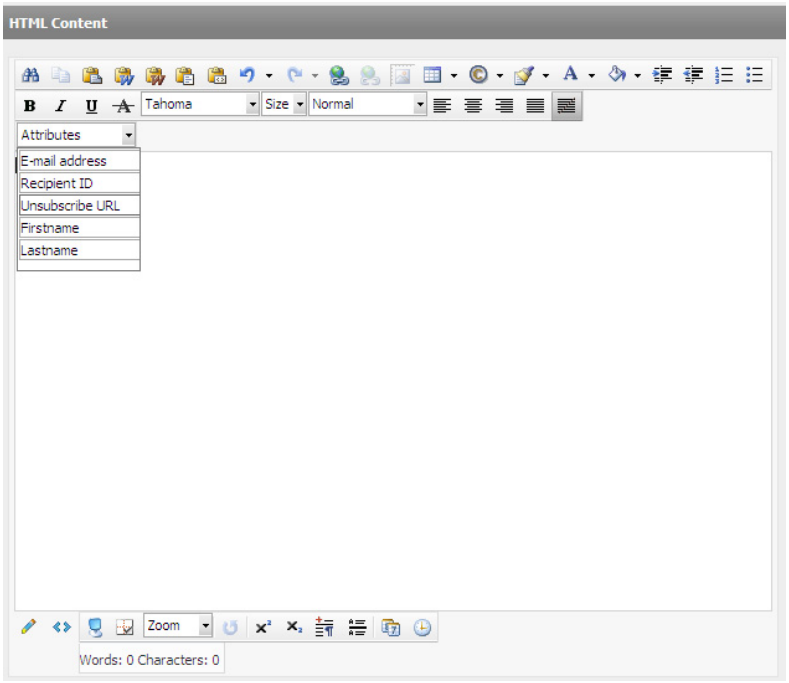
You can either choose to send an URL, HTML, text or EPiServer CMS page to your recipients.

## 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. Further information about variables can be found under *Import Standard Recipient List* on page 16.

**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 as intended, it may better to use the Text Editor.




## 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.

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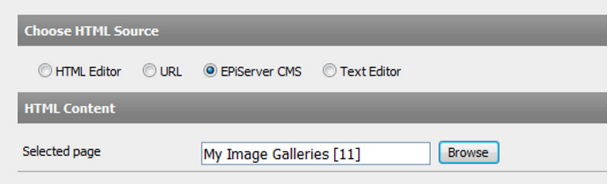
### EPiServer CMS

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

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




Note that 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.

### Text Editor

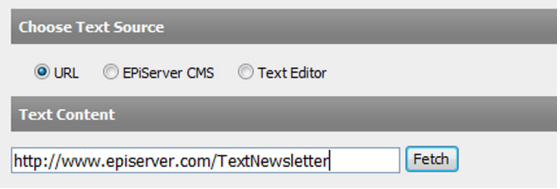
Select **Text Editor** in the **Choose HTML Source** section and enter the text that you want to be included in the mailing.

## 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.

### 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.




### 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.

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2. Click **Browse** and browse to the page that contains the content to be used in the newsletter.

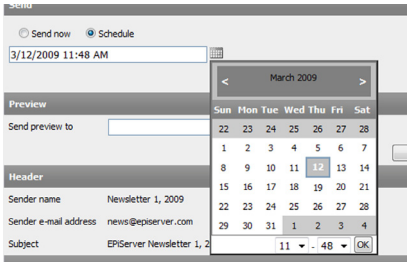
### Text Editor

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

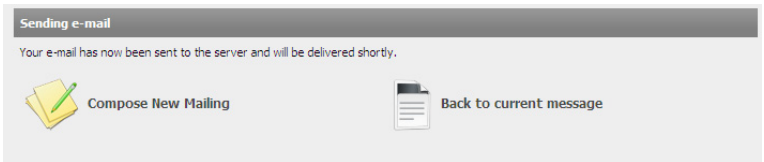
## Preview/Send Tab

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 message to be distributed for 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**. Note that 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**.
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.




## 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.

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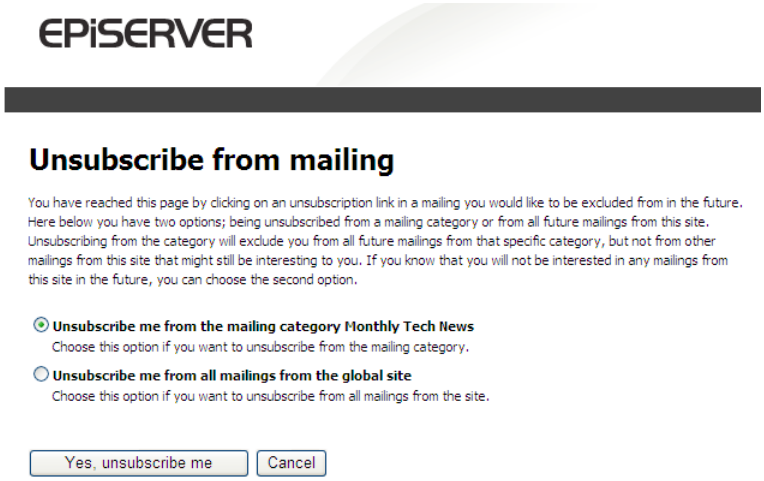
2. The recipient can also choose to unsubscribe to all mailings from this particular EPiServer Mail sender installation. The recipient will not receive any future mailings from this site.

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.

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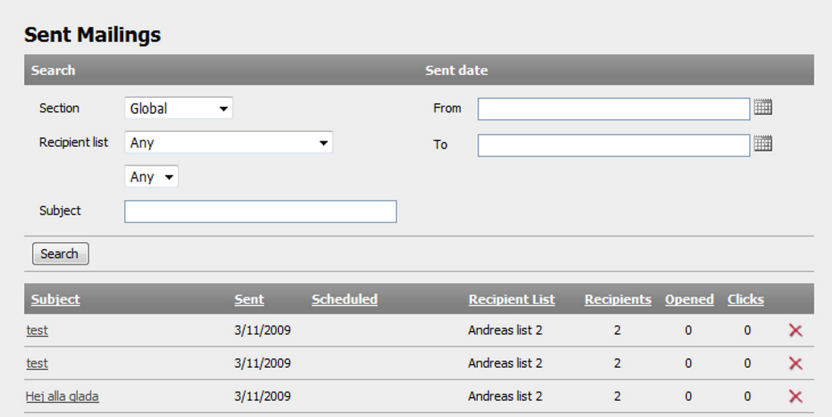
# Review Sent Mailings

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.

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.



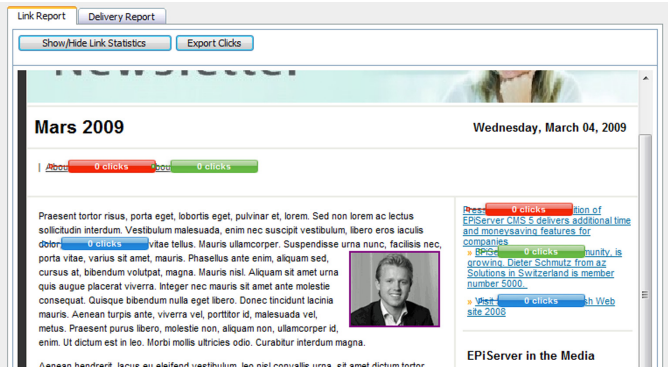

## Mailing Statistics

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.

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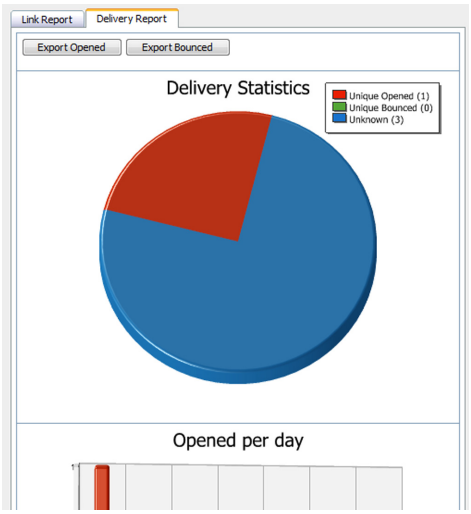
## Delivery Report Tab

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.

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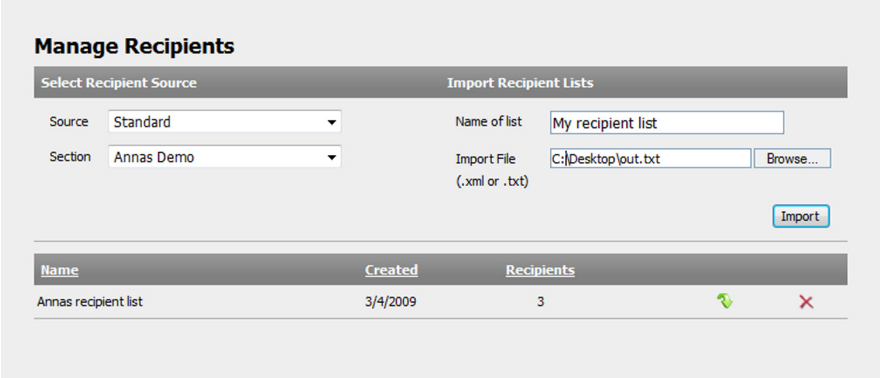
# Managing Recipients

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 according to below.

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 |
|---|---|---|---|---|
| 1 | **E-mail** | **Name** | **Sur Name** | **Title** |
| 2 | emailA@netstar.se | Andreas | Stjernström | Partner Manager |
| 3 | emailB@netstar.se | Gustav | Lagercrantz | CEO |
| 4 | emailC@netstar.se | Elvis | Presley | The King |
| 5 | emailD@domain.com | 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.

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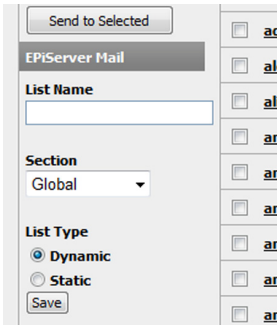
## Save E-mail Addresses from the Search Result




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 e-mails 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.

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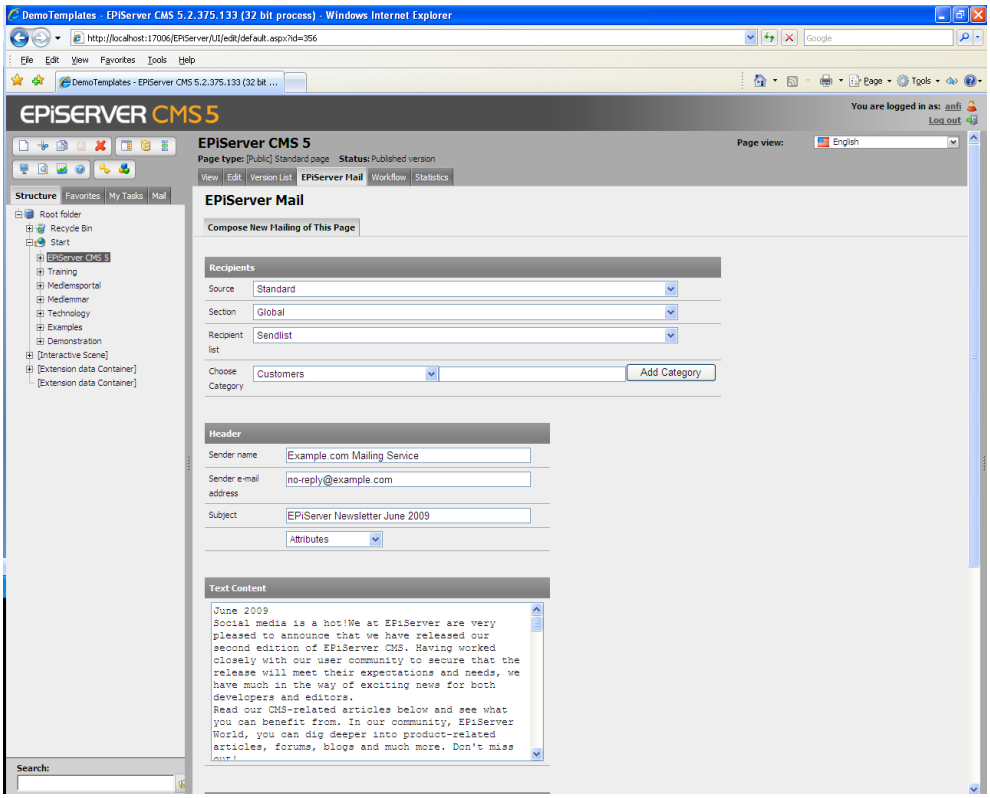
# Integration With EPiServer CMS

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 Web site. This means that you can easily create mailings from any of the EPiServer CMS pages on your Web site.

## 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. For each page, there will also be a **Message History** tab, where you will see an overview of the mailing statistics for that particular page.

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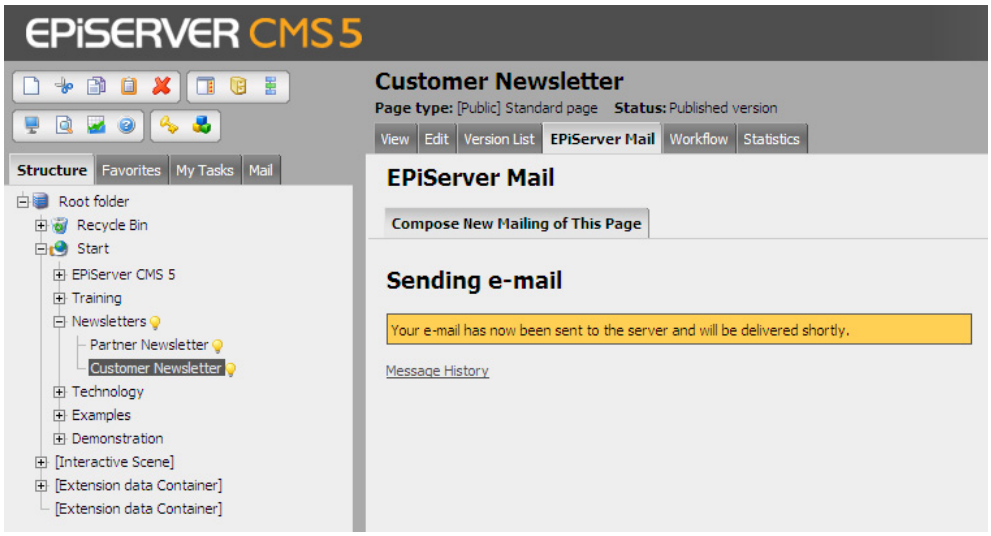
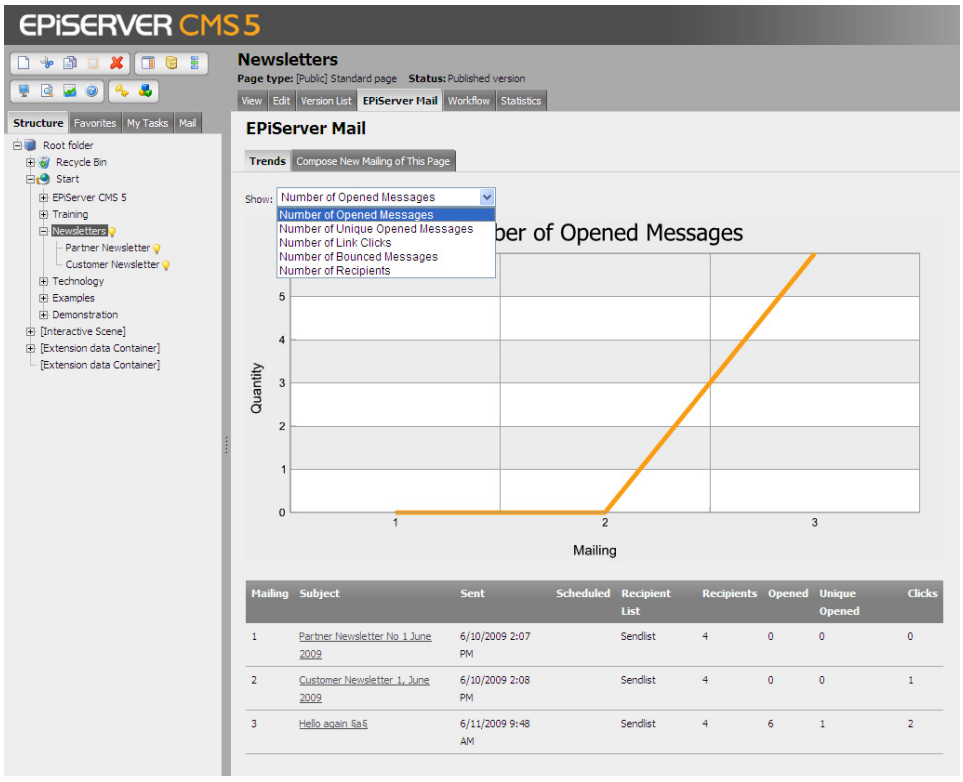



## The Statistical Trends Tab

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 under a tab named **Trends**, on the **EPiServer Mail** tab of the parent page.




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

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- **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.

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