

**EPiSERVER**

**EPiServer 7.5 Mail**

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**User Guide**

# **EPiSERVER**

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User Guide – EPiServer 7.5 Mail  
Revision A, 2013

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# Introduction

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This is the **User Guide for EPiServer Mail**, a powerful tool for creating online newsletters through e-mail distribution. 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.

## About this documentation

The described functions as well as the screen shot examples shown in this documentation are based on a standard installation with the sample site and templates. Treat any displayed data in the examples purely for illustration purposes.

Screen shot examples as well as glossary links are only displayed in English.

## Target groups

This documentation is intended for content editors working in EPiServer CMS and EPiServer Mail.

## References

This documentation describes features in EPiServer Mail. Features in EPiServer CMS will not be covered here. Therefore, the following documentation available from [world.episerver.com](http://world.episerver.com), may be useful:

- User documentation for editors of EPiServer CMS.
- User documentation for administrators of EPiServer CMS

## EPiServer help system

You can access the web help from the global menu. 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.

You can also access the web help by browsing to *EPiServer web help*.



From each view in the user interface with a help icon provided, click the icon to get context-sensitive help.

## Online community on EPiServer World

*EPiServer World* is an online community where you can find the latest product information. It is open to the public, for partners, customers, and everyone working with EPiServer products, such as editors, webmasters, site owners and developers. Here you can download material, participate in discussions, read articles, receive support and much more. Feel free to sign up as a member.

## Copyright notice

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## About EPiServer Mail

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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 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.

EPiServer Mail has the following features:

- 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

EPiServer Mail is built to handle large numbers of e-mails or newsletters and consists of a client part and a server (service) part. 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.

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

# Getting started

This section describes how you log in to EPiServer Mail, and access and navigate the different features. Note that the login procedures may be different from what is described here, depending on how your website and infrastructure is set up. Since EPiServer Mail is closely integrated with EPiServer CMS, the examples described here are based on a standard installation of EPiServer CMS.

As an editor or administrator, you usually log in to your website using a **specified URL** or a **log in button**.

## Logging in

Access the EPiServer website as follows:

1. Open your web browser and enter the website address (URL) applicable for the specific login procedure, or click the login button if there is one.
2. In the login window, enter your user name and password and click **Log in**.
3. In the top right corner, click the arrow to expand the welcome menu with available access options.



4. In the menu, select which interface you want to work with.
5. When logged in, use the **global menu** at the top to navigate to the different systems integrated with your website.



6. The global menu is automatically minimized, pull it down again by clicking the arrow.



## Navigating

You access EPiServer Mail through the edit view, provided that you have the proper access rights for your user account by selecting **Edit View**. You can also go directly to your personal dashboard by selecting the **Dashboard** option.

When logged in, use the **global menu** available at the very top to navigate your way around. In the menu you will find the different systems integrated with your website.

From here you can access both **Mail** for managing newsletters, and **CMS** for managing website content.

When selecting **Mail**, you will have the following options in the submenu:

- Composing *new mailings*
- View *sent mailings*
- Manage *recipients*
- View *pricing* options
- Manage *sections*



**Note** The options in the submenu may vary depending on your access rights. In the examples in this documentation we have assumed that the user has full permissions to all functions in EPiServer Mail.

## Composing new mailings

Mailings are composed from the **New Mailing** view. You start by selecting the recipients for the mailing. Then you select the content of the mailing, for instance a page on your website. You can also define tracking options, as well as campaign related information. Finally you will preview and send the mailing. You can personalize the message by adding attributes such as the name of the recipient, the use of up to 20 attributes is supported. The composing and sending of a mailing are described in more detail below.

### Selecting recipients

Enter the following information in the **Send to** section:

- In the **Recipients source** drop-down list, select the source for the recipient list. Find out more about recipients in the *Managing recipients* section.
- In the **Recipients section** drop-down list, select the section for which the mailing should be created. A section is a way to control the access rights for users to different recipient lists, refer to *Managing sections* for more information.
- In the **Recipients list**, select the recipient list to use for the mailing.



**Note** The **recipients list options** will change depending on the recipients source and section you selected in the first step.

### Tracking through Google Analytics

If you are using Google Analytics on your website, it is possible to use this to track the statistics for your mailing. Enter the campaign name you are using in the **Campaign name** field.

The screenshot shows the 'Compose New Mailing' interface in the EPiServer Mail module. The navigation bar includes 'Dashboard', 'CMS', 'Community', 'Mail', and 'Add-ons'. The 'Mail' section is active, showing sub-tabs for 'New Mailing', 'Sent Mailings', 'Recipients', 'Pricing', and 'Sections'. The main content area is titled 'Compose New Mailing' and contains the following fields:

- Send to** section:
  - Recipients source: Standard (dropdown)
  - Recipients section: Global (dropdown)
  - Recipients list: Global Accounts (dropdown)
- Google Analytics Tracking** section:
  - Campaign name: Fall Sales (text input)

### Defining content

The **Content** section is where you compose the actual content of the mailing.

- Enter a subject for the mailing in the **Subject** field. This text will be displayed in the subject field of the e-mail.
- You can select one or more attributes from the **Insert attributes** drop-down list and add them to the text in subject field. The options will vary depending on the information available in the recipients list previously selected. These are some examples:

- **E-mail address** displays the recipient's e-mail address
  - **Unsubscribe URL** displays an unsubscribe link
  - **Recipient ID** displays the recipient's ID
  - **Firstname** displays the recipient's first name
  - **Lastname** displays the recipient's last name
- In the **HTML Content** drop-down list, you select the web content to display in the mailing. This can either be a page on the website or a URL to a page on another website.
    - Select **EPiServer CMS** to choose a page on the site. This option also allows you to select a specific **language version** when browsing for that page on the website.
    - Select **URL** to enter a specific web address for the content, and enter the appropriate URL. Click **Fetch** to validate the URL and make sure that it is available.
  - Select a **Category** for your mailings. You can create and add categories, for instance "Monthly Newsletter", for your mailings, this information is used when unsubscribing to a mailing of a specific kind. Create categories by entering the category name and clicking **Add Category**. Then select a category in the **Category** drop-down list.
  - The **Plain Text** section allows you to enter a text to be displayed to recipients if their e-mail clients do not support HTML. You can also use attributes in the plain text message, select them from the drop-down list under the plain text editor.

Dashboard CMS Community **Mail** Add-ons

EPISERVER ? admin

New Mailing Sent Mailings Recipients Pricing Sections

### Content

Subject: Hello \$recipientId\$, take advantage of our great fall prices! Recipient ID

HTML content: EPiServer CMS Building online social commu Browse Language: English

Choose category: Monthly Sales Newsletters Monthly Sales Newsletters Add Category

Plain text: *Some recipients may not see any HTML content, instead you can create a plain text version of the mailing.*

Hello \$recipientId\$, take advantage of our great fall prices!  
Find out more on <http://world.episerver.com/fall-sales>

Recipient ID



**Note** If you want to add the **unsubscribe** URL option directly in the web page (for instance a newsletter template), the unsubscribe link must be added in that specific page template.

## Advanced settings

Clicking on **Advanced Settings** will expose additional settings for sender information and tracking.

- **Sender name** is the name of the sender which will be displayed to recipients.
- **Sender e-mail address** is the e-mail address that will be displayed to recipients.
- **Campaign source** is the source of the campaign, an option if you are using Google Analytics on the website.
- **Campaign medium** is the medium used for the campaign, an option if you are using Google Analytics on the website.

These fields will be populated with default values from the EPiServer Mail configuration if you do not change the information here.

Selecting the **Add recipient data as parameter in redirected links** check box will add information about recipients to the redirected links information, for tracking purposes.

▼ **Advanced Settings**

---

**From**

Sender name

Sender e-mail address

---

**Google Analytics Tracking**

Campaign Source

Campaign medium

---

**Tracking**

Add recipient data as parameters in redirected links

## Previewing and sending the mailing

In this last step you will review and finally send the mailing. Before sending it to the entire recipient list, you have an option to send the mailing as a preview to selected recipients. You can also schedule the mailing to be sent at a given time. Below are the options under the **Send** section.

### Previewing the mailing

Before sending you can preview the mailing in a browser by clicking **Preview in Browser**.

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

To send a mail for review, select the **Preview** option. Enter the e-mail addresses of the selected recipients separated by commas. Click **Send** to send the mailing for review.

**Send**

Preview
  Schedule
  Send now

E-mail preview to:

### Sending the mailing

Select the **Send Now** option and click **Send** to send the final mailing after review. You will get a confirmation that your mailing has been sent. You can choose to go back to your current message or to compose a new mailing.

Send

Preview  Schedule  Send Now

### Scheduling the sending

Select the **Schedule** option to define a date and time for the mailing to be sent, and click **Schedule Mailing**. You will get a confirmation that your mailing has been scheduled for delivery. You can choose to go back to your current message or to compose a new mailing.

Send

Preview  Schedule  Send Now

Your e-mail has been scheduled for delivery on 8/30/2012 12:45:00 PM.

When you have sent a mailing, you can go to the **Sent Mailings** option to view and monitor the outcome of the mailing. Find out more about this in *Viewing sent mailings*.

## Viewing 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.

Statistics are accessed from the **Sent Mailings** view. This view has a search interface where you can search by section, recipient list, subject and the date when the message was sent. date and time for *scheduled mailings* are also displayed.

### Mailings

View and manage your sent mailings or create a new mailing.

#### Search

Section:

Recipient source:

Recipient list:

Subject:

#### Sent date

Start date:

End date:

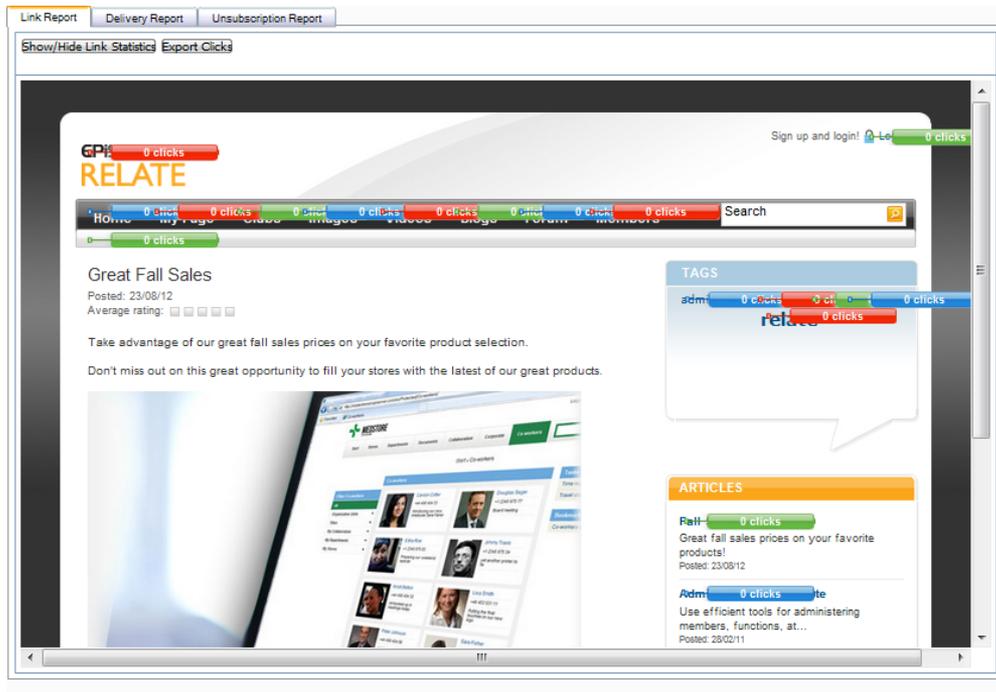
Subject	Sent	Scheduled	Recipient list	Recipients	Opened	Clicks	
Hello §a§, take advantage of our great fall sales prices!	2:42 PM		Premium partners	5	0	0	×
Hello §a§, take advantage of our fall sales prices	1:49 PM		Premium partners	5	0	0	×
Hello §a§, take advantage of our fall sales prices	1:46 PM	8/26/2012	Premium partners	5	0	0	×



**Note** If you remove a recipient list, the statistics collection will be interrupted for mailings using that specific recipient list.

## Mailing statistics

Click the name of one of the listed mailings to open the **Mailing Statistics** window,



The **Mailing Statistics** window has the following tabs:

- 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.
- The **Delivery Report** tab shows 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.
- The **Unsubscription Report** tab shows a pie chart how many recipients that have chosen to unsubscribe from further mailings. You can export these statistics.

## 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 the EPiServer Relate or EPiServer CMS, may be available depending on your installation.

Dashboard CMS Community **Mail** Add-ons

EPISERVER ? admin

New Mailing Sent Mailings **Recipients** Pricing Sections

### Recipients

View and manage recipients for your mailings.

**Select Recipient Source**

Source: Standard

Section: Nordic

**Import Recipient Lists**

Name of list: Nordic Customers

Import file (xml or txt):  Ingen fil har valts

The recipient list has been successfully uploaded.

Name	Created	Recipients	Notifications	Download	Remove
Nordic Customers	Today 8:23 PM	0			

## Importing a standard recipient list

EPiServer Mail can import e-mail address lists as xml and csv files, separated by semi colon, comma or tab space. You can also import e-mail addresses as text files in txt format, separated by a line break.

### 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, it handles up to 20 variables for each recipient list.

	A	B	C	D
1	info@test.se	Forname1	Lastname1	Jobtitle1
2	test@test.se	Forname2	Lastname2	Jobtitle2
3	user@admin.se	Forname3	Lastname3	Jobtitle3
4	user2@admin.se	...	...	...
5	user3@admin.se			
6	usergroup@admin.se			
7	user@test.se			
8	testuser@test.se			
9	info2@test.se			
10	test2@test.se			

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.

For further information about designing your own personalized messages, see the technical documentation for EPiServer Mail on *EPiServer World*.

## Handling 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.

## Handling unsubscribe to mailings

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

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.



**Note** 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.

Yes, unsubscribe me

Cancel

## Pricing usage and statistics

The **Pricing** 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 the EPiServer Mail setup.

In the **Send Statistics** section, your past mailing statistics are shown, as number of delivered messages per month.

Dashboard CMS Community **Mail** Add-ons **EPISERVER** ? admin

New Mailing Sent Mailings Recipients **Pricing** Sections

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### Pricing

View pricing and usage information.

#### 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

#### Send Statistics

Month	Delivered Messages
<b>Total in this period</b>	<b>0</b>

## Managing 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**. By creating sections and adding users or user groups to these through **access rights**, you can control which users will have access specific recipients lists.

### Editing and removing sections

Existing sections can be edited or removed under **Edit Section** in the **Sections** view.

Dashboard CMS Community **Mail** Add-ons EPISERVER ? admin

New Mailing Sent Mailings Recipients Pricing **Sections**

### Sections

Manage sections used in your mailings.

#### Edit Section

Section Name	SiteID	
Global Accounts		<a href="#">Edit</a> <a href="#">Remove</a>
Nordic		<a href="#">Edit</a> <a href="#">Remove</a>

[Create New](#)

### Creating sections

To create a new section, click **Create New** button, enter the name of the section and the **site ID** to which it applies. The site ID is applicable if you have several different websites in your installation, this is defined in the configuration files for the installation.

In the **Search users/groups** to add group box, search for the users/groups to be added to this section, and select the access rights they should have. Click **Save** to save the section definitions.

Dashboard CMS Community **Mail** Add-ons EPISERVER ? admin

New Mailing Sent Mailings Recipients Pricing **Sections**

---

### Sections

Manage sections used in your mailings.

#### Edit Section

Name

SiteID

Name	Read	Create	Change	Delete	Administer	
Administrators	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>				
CommunityAdmins	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Remove"/>
MailAdmins	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>				
MailEditors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Remove"/>

#### Search users/groups to add

Name	
Administrators	<input type="button" value="Add"/>
Anonymous	<input type="button" value="Add"/>
CommunityAdmins	<input type="button" value="Add"/>
CommunityModerators	<input type="button" value="Add"/>
MailAdmins	<input type="button" value="Add"/>
MailEditors	<input type="button" value="Add"/>
CommunityMembers	<input type="button" value="Add"/>