

# E-Mail Campaign Manager 1.3.3 for Sitecore CMS 6.5 Marketer's Guide

User guide for marketing analysts and business users



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## **Chapter 1**

## Introduction

This document is designed for end users, and provides detailed information on how to create and edit a message, carry out an e-mail campaign and analyze its Sitecore Engagement Analytics reports. For more detailed technical information about the module, read the *ECM Administrator's and Developer's Guide*.

The E-mail Campaign Manager lets you carry out large e-mail campaigns and analyze their results so you can continuously optimize your campaign results. With this module you can:

- o Create and manage e-mail messages with native Sitecore authoring tools.
- Find the best e-mail subject messaging and design using Sitecore A/B testing tools.
- Get detailed Sitecore Analytics reports with user behavior tracking across e-mails and the Web site.
- o Utilize e-mail subscriber lists from CRM and other enterprise applications.
- o Manage self-service subscription forms on your Web site.

This document contains the following chapters:

- Chapter 1 Introduction
- Chapter 2 E-Mail Campaign Quick Walkthrough
- Chapter 3 E-Mail Campaign Manager Tutorials
- Chapter 4 Using E-Mail Campaign Reports
- Chapter 5 Reports Reference



## 1.1 Fundamental Concepts

This section contains a list of definitions for important terms and concepts used throughout the E-Mail Campaign Manager documentation.

#### Message

A message is an e-mail that is sent to a set of recipients.

#### Target Audience

A target audience is an item that lets Sitecore users create and dispatch messages related to a specific topic. For instance, in the following screenshot, *Sitecore Insights* is the target audience:

Standard Messages     Orafts     Of     Orafts     Of     Orafts     Of     Orafts     Of     Of	Drafts     Drafts     Drafts     Dromotional Newsletter     Internal News     Drews     Scheduled     Processing		Campaign tecore Insights	
Promotional Newsletter     Internal News     Week 04     Scheduled     Processing	Promotional Newsletter     Internal News     Week 04     Scheduled     Processing	± 📋	Standard Messages	
Internal News	Internal News	= 💿	Drafts	
		۰.	Promotional Newsletter	
Scheduled	Scheduled		📰 Internal News	
🔗 Processing	🔗 Processing	±	Week 04	
		9	Scheduled	
🕲 Sent	🕑 Sent	99	Processing	
		1	) Sent	

Each target audience is associated with one list of subscribers. When a visitor uses a form on a Web site to subscribe for messages about the associated topic, they are added to the list of subscribers for the target audience.

Each target audience item contains a set of subfolders that are used to store message drafts, messages being processed, and messages that have already been sent. Before you start working with messages, you must choose a target audience.

Target audiences are stored as children under a manager root.

#### Manager Root

A manager root item stores one or more target audiences. A Web site generally has one associated manager root.

#### Subscriber

A subscriber is an individual with an associated e-mail address that receives messages from one or more target audiences.

#### Personalization

Personalization is the process of including recipient specific information in the message sent to each subscriber.

For instance, you can insert this line in the beginning of the message:

Hello \$name\$!

When the message is sent, the *snames* token is replaced with the subscriber's name.

#### **Message Subject Test**

A good message subject catches your eye and you tend to read that message first even if you have a long list of unread messages.

The Message Subject A/B Test lets you find the subject that entices the most recipients to open the email, thereby increasing the return on investment (ROI) of the message.

In a message subject test, you send several versions of a message, each containing a different subject, to a limited set of subscribers. After the message has been sent and the subscribers have had time to review and respond to the message, you can compare the conversion rates associated

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with each variation of the message. You can then identify the most effective subject and send it to the remainder of the list of subscribers.

#### **Conversions and Goals**

A conversion occurs when a visitor to a Web site performs a desired action, such as, purchasing a product or signing up for a conference. Marketing departments often design e-mail campaigns to entice the recipients to visit a Web site and complete some specific actions. Messages with a higher number of conversions have a better (ROI).

In Sitecore Analytics, goals represent the desired actions which, when taken, correspond to conversions.

#### Message Engagement Plan

Engagement plans allow you to control some of the specific ways in which your website interacts and communicates with the visitors to your website.

The ECM uses the message engagement plan to to manage the sending process and track the behavior of the recipients of the message.

For more information about Engagement Plan, see Engagement Automation Cookbook.

#### **Engagement Value**

The level of commitment exhibited by your customer is the secret ingredient of quality called the Engagement Value. Each visit produces an engagement value calculated from all the resources a visitor consumes during one or multiple visits. Resources consumed can include goals, campaigns or forms submitted.

For more information about the Engagement Value, see Executive Dashboard Cookbook.

#### Relevance (Value per Visit)

Relevance measures the value per visit of your website visitors. If your website has more relevance to your customers then your marketing effectiveness increases.

Formula:

Relevance = Value/Visits



## **Chapter 2**

## E-Mail Campaign Quick Walkthrough

This chapter walks through the activities involved in a typical e-mail campaign from the perspective of Maria, a marketing analyst. The chapter describes the most common tasks she must perform, such as, creating new messages, sending messages, and reviewing reports.

In some cases, Maria checks the effectiveness of different message subjects on a small set of subscribers before choosing the best subject to send to the majority of the subscribers on the list.

This chapter contains the following sections:

- Considering the Goals of a Message
- Creating a New Message
- Sending a Message
- Monitoring the Dispatch Process and Visitor Behavior
- Analyzing the Value of the Message
- Performing a Message Subject Test



## 2.1 Considering the Goals of a Message

Let me introduce Maria.

Maria is a marketing analyst. From time to time, her department launches various new services on their company's Web site. Maria's job is to attract customers to these new services, monitor their behavior and analyze the value that the services bring. She uses the E-mail Campaign Manager to send messages to the lists of subscribers and spread the news about the new services.

Whenever Maria sends a message, she has the following things set up:

- A set of goals that she's hoping the message will help her achieve.
- Engagement value points set for each goal.

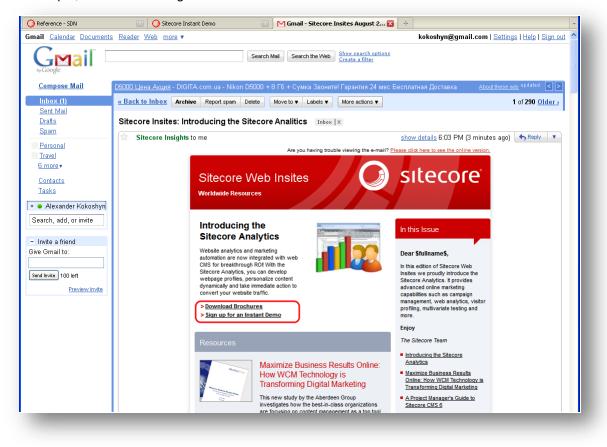
For example, in general, Maria would like people to sign up for an instant demo, which people can do by visiting the Web site and submitting some information on a form. This has value for her organization because a high percentage of people who attend instant demos eventually make a purchase.

Maria would also like website visitors to download some brochures. When a visitor downloads a brochure they gain some engagement value points. However, downloading a brochure generates fewer engagement value points than signing up for a demo.

Maria hopes that the message she sends will increase the number of people who sign up for an instant demo. The more people who sign up for an instant demo, the higher is the value of the campaign and, consequently, the return on investment (ROI) of the message.

Therefore, when Maria creates the message, she includes links back to appropriate pages on the Web site that will help encourage recipients to sign up for an instant demo and complete her goals.

For example, here is a message which includes a link to the instant demo form on the Web site.





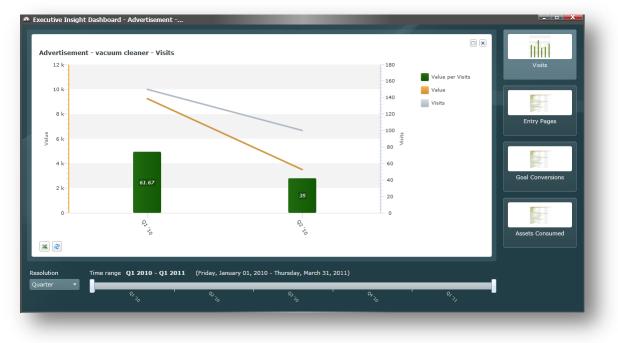
When a recipient clicks on the Sign up for an instant demo link, they see a page like this:

Solutions	Products	Customers	Partners	News & Events	Training	Support	Sitecore	Contact
me > Sitecore In:	stant Demo						0	Share this page
Online Demons Description		● I want a ○ I want to	re Instant I n Instant Demo. o request an altern date and time	Demo nate demo date and time				
Take a tou								
Have a que			u (*required					
Sitecore R Get White Papers Case Studies and	;, Webinars, I More	Please prov		formation below. A confi	rmation emai	I will be sent to your e		
Contact Sitecore for More Information Sitecore worldwide contacts •		Email Company			^	Your email addres are confidential ar See our Privacy Po	ss and personal in 1d will not be sold	formation or rented.
		How did	you hear abou	it Sitecore				
		Choose o		e Sitecore newsletter	*			
			Your Demo	e onecore newsietter				
iet Started with	Siterora		Get Our Newslette	ar.		Velir   Read Case Study		

When the recipient successfully completes the form and clicks the **Schedule your Demo** button, Sitecore registers this as a conversion and the current visit accumulates a certain value.

When Maria considers that enough time has passed for subscribers to react to the message, she opens the Dashboard reports to analyze the value of her campaign.

For instance, in the Visits report she sees the volume of traffic and the value points that were accumulated.





## 2.2 Creating a New Message

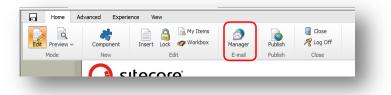
Before creating a new message, Maria decides who should receive the message and selects an appropriate target audience. Later, Sitecore sends the message to all of the subscribers who belong to this target audience. In this case, Maria selects the *Sitecore Insights* target audience.

## 2.2.1 Selecting an Appropriate Target Audience

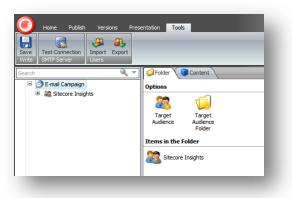
Before Maria can create a message, she needs to select a target audience.

To select the appropriate target audience:

- 1. Maria opens the **Page Editor**.
- 2. On the ribbon, on the Home tab, in the E-mail group, she clicks Manager.



Sitecore starts the E-Mail Campaign Manager.



3. In the content tree, she selects the Sitecore Insights target audience.



### 2.2.2 Creating the Message

Now that Maria has selected a target audience, she can start to create the actual message that she wants to send.



To create the message:

1. Maria selects the *Sitecore Insights* target audience and in the right-hand pane, on the **Folder** tab, she clicks **Newsletter Message**. Maria might use any other message type but **Newsletter Message** contains pre-defined design that meets her requirements.

Home Publish Versions Pres	entation Tools	_	
Search	Folder Content Insert Message Folder Items in the Folder	Two-Column Message Message	HTML Pre-existing Page
U sent	Standard Messages	Drafts	Scheduled

2. In the dialog box, she enters the name of the new message, for example *Introducing the Sitecore Analytics* and clicks **OK**.

Introdu	ucing the	Sitecor	e Analyt	ics
	OK		Cancel	
	OK		Cancel	

Sitecore then creates the new message in the Drafts folder.

	-mail Campaign
- 2	Sitecore Insights
±	Standard Messages
=	Drafts
	Introducing the Sitecore Analytics
	Scheduled
	🔗 Processing
+	🗐 Sent

Now that Maria has created the message item, she can edit the text in the message.

To edit the message:

- 1. Maria selects the message in the *Drafts* folder.
- 2. On the Message Preview tab she clicks Edit to open the message in the Page Editor.

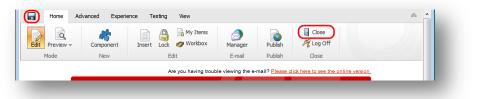
<ul> <li>② E-mail Campaign</li> <li>□ 28 Sitecore Insights</li> </ul>	Edit Test Dispatch Messages
🗉 🛄 Standard Messages	
😑 🥯 Drafts	From: Sitecore Insights <do-not-reply@yoursite.net></do-not-reply@yoursite.net>
Introducing the Sitecore Analytics	To: 6 subscriber(s) Subject: Sitecore Newsletter
Scheduled	
🔗 Processing	Are you
🗉 📬 Sent	



3. She edits the message so that it looks like this:



4. She clicks the Save button and then clicks Close at the top of the page.



5. As her message contains links to images she has just created and they must be published before recipients can see them, Maria publishes the site using the *Incremental Publish* option.

The message is now ready to be sent.

#### Note

When Maria clicks **Edit**, the editor opens in a new window. When she clicks **Close** in this window, Sitecore does not close the window automatically, so Maria closes it manually as she would close any other browser window. To see the changes that she has made to the message, she clicks the message in the content tree to refresh the **Preview** tab.



## 2.3 Sending a Message

Now that Maria has created a message, she can send it to subscribers.

To send the message:

- 1. Maria selects the message.
- 2. On the Message Preview tab, she clicks Dispatch Messages.

D E-mail Campaign     Stecore Insights     D Standard Messages     D Parls     D Parls     D Parls     D Parls	Edit Test Dispatch Messages From: Sitecore Insights <do-not-reply@yoursite.net> To: 6 subscriber(6) Subject: Web Instes: Introducing the Sitecore Engagement Analytics</do-not-reply@yoursite.net>
Scheduled	

Sitecore starts the **Dispatch Message** wizard.

Maria follows the **Dispatch Message** wizard.

3. Maria decides to skip the Limited Number of Subscribers dialog box and send the message to all subscribers from the list right away. She clicks Next.

ited Number of Subscribers Decide whether to send the message to	o every subscriber or to a limited number of subscribers.
If you decide to send the message to a a random subset of subscribers.	limited number of subscribers, the wizard will send messages to
Dispatch to Limited Set of Subscrib Quantity: 10 🐊 % (1 subsc	
	<pre>Cancel</pre>

4. In the Launch Message Dispatching dialog box, Maria selects the Now option and clicks Start.

-	e Dispatching the dispatch process sh	ould be started.			$\bowtie$
Launch Dispatch	hing				
• Now - begin	the dispatch process im	mediately.			
OLater - begin	the dispatch process a	t the specified t	time.		
Date and Time-					
5/11/2010	✓ 6:17 PM	~			
s message will b	e sent to approximately	/ 3 subscribers.			
			< Back	Start >	Cancel

The message sending process starts to run in a background. The message being processed is placed in the *Processing* folder. When the dispatch is completed, the message is moved to the *Sent* folder.



## 2.4 Monitoring the Dispatch Process and Visitor Behavior

The ECM uses the message engagement plan to manage the sending process and track the behavior of the recipients of the message.

To monitor how the dispatch process is going and how visitors behave, Maria opens the Engagement Plan Monitor.

To open the Engagement Plan Monitor:

- 1. Maria selects a target audience.
- 2. In the *Processing* or the *Sent* folder, she selects a message.
- 3. She clicks Monitor Behavior to monitor the subscriber behavior.



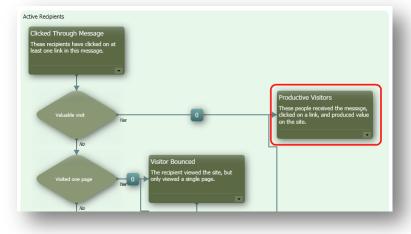
The module opens the engagement plan monitor.



For instance, Maria wants to know how many subscribers have already clicked links in the message. To find this out, she looks at the **Clicked Through Message** state. If the visitor clicks a link in the message, the module puts the visitor in this state.



Maria gives subscribers some time to see the message and react to it. As time passes, recipients perform valuable actions on the website, for example by converting a specific goal, like *Downloading a Brochure* and the engagement plan moves them to the **Productive Visitors** state.



Maria uses the **Engagement Plan Monitor** to see when the majority of visitors have reacted to the message. She looks at the **Inactive Recipients** and **Active Recipients** groups. She wants to investigate how effective the Email Campaign Message has been and analyzes the value of the message using the **Engagement Analytics** reports.



## 2.5 Analyzing the Value of the Message

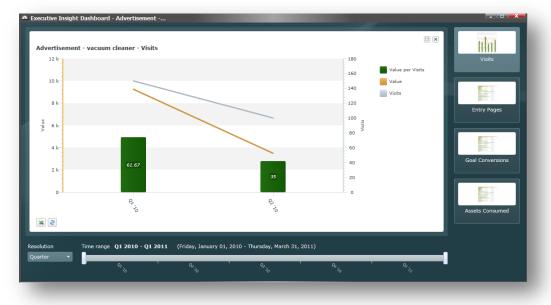
When Maria has verified that a significant amount of subscribers have reacted to the message, she analyzes the value of the message using the **Engagement Analytics** reports.

To view the reports:

- 1. Maria selects a target audience.
- 2. In the *Processing* or the *Sent* folder, she selects a message.
- 3. She clicks Analyze Value to view the engagement analytics reports related to the message.



The module opens the Executive Insight Dashboard with the reports.



The Executive Insight Dashboard application provides Maria with marketing reports of an email campaign's effectiveness.

For instance, in the **Visits** report she sees the volume of traffic the campaign generated and the engagement value points that were accumulated in the current campaign.



## 2.6 Performing a Message Subject Test

A message subject A/B test helps Maria identify the subject that entices the most recipients to open the e-mail, thereby increasing the effectiveness and ROI of a given message.

With the message subject test, Maria can send a message with multiple variations of the message subject to a limited set of subscribers. After it has been sent and the subscribers have had time to read and respond to the message, Maria can compare the relevance associated with each variation. She can then choose the best subject to send to the remainder of the list of subscribers.

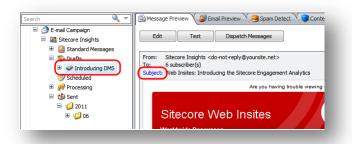
In this section, Maria carries out a message subject test, reviews the Subject Test report, and then completes the dispatch operation using the subject that performs best.

## 2.6.1 Configuring Multiple Subjects

Maria composes three different subjects to test. Now she needs to configure the module to use these subjects.

To configure multiple subjects:

- 1. Maria selects the message in the *Drafts* folder.
- 2. On the Message Preview tab, she clicks Subject.



Sitecore starts the Message Subject dialog box.

3. In the **Message Subject** dialog box, in the **Message Subject(s)** fields, Maria enters the subjects she wants to test and clicks **OK**.

Message Subject	
Enter more than one subject to test the effectiveness subjects.	of different message
	Insert User Field
lessage Subject(s):	English
Web Insites: Introducing the Sitecore Engagement a	Analytics
Brochure and Demo	
Sitecore News	
f you enter more than one subject, an A/B test will be automa ressage.	ntically created for this
ſ	



Now the subject A/B test is configured for this message. The **Subject** link changes to **Subject** (1 of 3) on the **Message Preview** tab.

Insights	Edit Test
lard Messages	
s	From: Sitecore Ins
troducing DMS	To: 6 subscriber
duled	Subject (1 of 3): Web Insites
ecina	

- 4. On the **Message Preview** tab, Maria clicks **Dispatch Messages**. Sitecore starts the **Dispatch Message** wizard.
- 5. In the Limited Number of Subscribers dialog box, she selects the Dispatch to Limited Set of Subscribers check box and in the Quantity field specifies the percentage of subscribers that she wants to use in the test. Maria clicks Next to continue.

mited Number of Subscribers Decide whether to send the message to every sub-	scriber or to a limited number of subscribers.
If you decide to send the message to a limited num a random subset of subscribers.	ber of subscribers, the wizard will send messages to
✓ Dispatch to Limited Set of Subscribers Quantity: 50 ♀ % (3 subscribers)	)
Subject MV Test is configured for this message.	
	< Back Next > Cancel

The subscribers for this subset are chosen randomly. The actual number of subscribers in the subset is shown in brackets.

6. In the Launch Message Dispatching dialog box, Maria selects the Now option and clicks Start. Sitecore sends messages to the subset of subscribers.

Sitecore moves the message to the Processing folder.



### 2.6.2 Reviewing the Message Subject Test Report

Maria gives the subscribers some time to read the message and react to it. After that she views the Message Subject Test report.

To view the Message Subject Test report:

1. Maria selects the message in the *Processing* folder.



2. On the Message Preview tab, she clicks View Test Results to view related reports.



Sitecore opens the **Message Subject Test** dialog box.

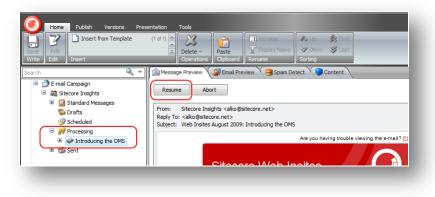
Message Subject Test This table shows the relative effectiveness of each message sul per visit. Select the test winner and click "Stop the Test" to stop send the message with the selected subject to all the remaining	the message subject test and
otal number of test emails sent: 3 n equal number of emails has been sent with each subject.	
Subject	Value/Visit 👻
Web Insites: Introducing the Sitecore Engagement Analytics	18.75
Brochure and Demo	0
Sitecore News	0
ſ	Stop the Test Cancel

In this report, Maria selects the test winner and clicks **Stop the Test** to stop the message subject test. Then she clicks **Resume** to send the message with the selected winning subject to all the remaining recipients.

#### 2.6.3 Complete the Dispatch Process with One Subject

When Maria has selected the subject that best suits her goals, she can send the e-mail with this subject to the rest of the subscribers.

On the Message Preview tab, Maria clicks Resume to continue the sending process.





## **Chapter 3**

## **E-Mail Campaign Manager Tutorials**

This chapter contains tutorials which describe how to perform various actions using the features of the ECM module.

This chapter contains the following sections:

• Using the E-Mail Campaign Manager



## 3.1 Using the E-Mail Campaign Manager

This section describes how to perform a number of the most common tasks in the E-Mail Campaign Manager.

### 3.1.1 How to Access the E-Mail Campaign Manager

To access the E-Mail Campaign Manager from the Page Editor:

- 1. Open the Page Editor.
- 2. In the ribbon, on the Home tab, in the E-Mail group, click Manager.



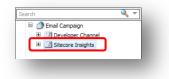
Sitecore starts the E-Mail Campaign Manager.

Ave Test Connection Import Export Intro SMTP Server Users	
earch 🔍 🔻	Folder Content
Campaign     Campaign	Options Target Audience Folder Terms in the Folder Sitecore Insights

To open the E-Mail Campaign Manager from the Sitecore Desktop, click Sitecore, All Applications, E-Mail Campaign, E-Mail Campaign Manager.

#### How to Select a Target Audience

In the E-Mail Campaign Manager, you can see the target audiences under the manager root:



## 3.1.2 How to Find a Message

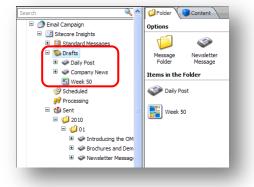
The messages are stored in folders under the target audience items.

To find a message:

1. In the E-Mail Campaign Manager, select a target audience item.



2. In the *Drafts* folder, look for your message.



You may also want to find a message that you have sent previously. Sent messages are stored in the *Sent* folder and they are organized in subfolders by date:



Messages that are being processed are stored in the *Processing* folder. Messages that are used in a message subject test are stored in this folder as well.

Messages that are scheduled for dispatching at a later time are stored in the Scheduled folder.

#### 3.1.3 How to Preview a Message in Different Clients

The ECM allows you to see how your email message looks in different email clients.

#### Note

To be able to use this functionality, you must sign up for the Email Preview service in the Sitecore App Center. For more information about this, see the document *Getting Started with Sitecore App Center*.

To preview how your email looks in different clients:

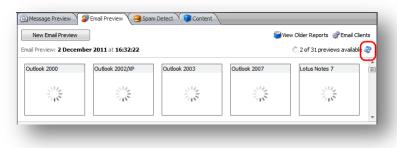
- 1. In the *Drafts* folder, select a message.
- 2. In the Email Preview tab, click New Email Preview.

<ul> <li>B -mail Campaign</li> <li>Sitecore Insights</li> </ul>	New Email Preview				Pemail Clients
<ul> <li>Gamma Standard Messages</li> <li>Survey Drafts</li> <li>Newsletter Message</li> </ul>			all Preview" to initiate a preview g. Click on "Email Clients" to add	-	
<ul> <li></li></ul>	AOL Mal (Explorer)     BlackBerry 8900     Hotmail (Explorer)     Lotus Notes 6.5     Me.com (Frefox)     Outlook 2007     Thunderbird 2.0     Yahoo! Mail (Frefox)	AOL Mail (Firefox)     LG Optimus     Hotmail (Firefox)     Lotus Notes 7     Outlook 2000     Outlook 2010     Thunderbird 3.0     HTC HD7	Apple Mail 4     Gmail (Explorer)     Phone 3GS     Lotus Notes 8     Outlook 2002/NP     Plain Text     Samsung Intrepid     Color blindness	<ul> <li>BladdBerry Curve</li> <li>Gmail (Firefox)</li> <li>IPad 2</li> <li>Lotus Notes 8, 5</li> <li>Outlook 2003</li> <li>Nokia N96</li> <li>Yahoo! Mail (Explorer)</li> </ul>	

When you click **New Email Preview**, the module requests the preview images through the SAC. Generating preview images for all the selected clients can take some time. To view the



images that are generated so far, click the Refresh button:



When you click it, the images that are generated so far appear:

New Email Preview			📛 Vie	ew Older Reports 💣 Email	Clients
ail Preview: 2 Decembe	er 2011 at 16:32:22			🕆 27 of 31 previews availa	ble 🎯
Dutlook 2000	Outlook 2002/XP	Outlook 2003	Outlook 2007	Lotus Notes 7	Ê
	Error			Andreaster	
Transformer Trans			Harris Maria Mar Maria Maria Mari	B B B B B B B B B B B B B B	

3. Click an image to view it in full size:

	Preview 🛛 🔐 Email Preview 🖉 Spam Detect 🗸 🍞 Content	
New Ema	ail Preview	🝟 View Older Reports 🛷 Email Clients
Email Preview:	: 2 December 2011 at 16:32:22	🥋 27 of 31 previews available 💝
		k 2007 Lotus Notes 7
Email Preview:	: Outlook 2007	
Insights [do-	e Move to Create Other Folder Rule Actions Block Not Junk Actions Not Renail Control C	✓ Unread k Select ✓ E
		e-mail? Please click here to see the online version.
		e-mail? Please click here to see the online version.

#### How to View Older Reports

You can view email previews that were generated previously.

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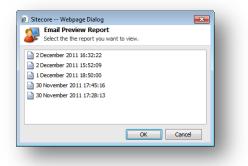


To view older reports:

1. On the Email Preview tab, click View Older Reports:

		資 Viet	w Older Reports @Email C	lients
er 2011 at 16:32:22		_	27 of 31 previews availab	ole 🍣
Outlook 2002/XP	Outlook 2003	Outlook 2007	Lotus Notes 7	1 0
		A MARKET AND A MAR	Contract of the second s	-

The module opens the dialog box where you can select an older report:



2. Select a report and click OK.

#### How to Select Email Clients

By default the system generates email previews for all available clients. You can select the email clients that you want the system to generate previews for.

To select email clients:

1. On the Email Preview tab, click Email Clients:





The module opens the dialog box where you can select email clients:

vailable:		elected:	
	-	🚖 Outlook 2000 🌸 Outlook 2002/XP	Â
	•	A Outlook 2002/XP	
		A Outlook 2003	
		Lotus Notes 7	
		Lotus Notes 6.5	
		A Lotus Notes 8	_
		Thunderbird 2.0	E
		Thunderbird 3.0	
		Outlook 2010	
		😭 Plain Text	
		🚖 Lotus Notes 8.5	
		🚖 Color blindness	
		🚖 Apple Mail 4	
		☆ Hotmail (Explorer)	
		🚖 AOL Mail (Explorer)	
		All (Explorer)	
		😭 Gmail (Explorer)	
		😭 Gmail (Firefox)	
		🌸 Hotmail (Firefox)	-

2. Select email clients and click OK.

#### 3.1.4 How to Perform Spam Detection

You can test your message to see how different spam filters will treat it.

#### Note

To be able to use this functionality, you must sign up for the Spam Check service in the Sitecore App Center. For more information about this, see the document *Getting Started with Sitecore App Center*.

To perform spam detection:

- 1. In the *Drafts* folder, select a message.
- 2. In the **Spam Detect** tab, click **New Spam Detection**.

🛛 🔿 E-mail Campaign				
Sitecore Insights	Run spam detection for:			💞 Spam Filters
Standard Messages	All subjects		<ul> <li>New Spam Determination</li> </ul>	ection
🖃 📡 Drafts				
June - Sitecore Insites	No spam checks have be	en perfomed. Click on "New	Spam Detection" to initiate a spa	im check for this message.
I Scheduled	The listed spam filters are	e currently enabled. Click on	"Spam Filters" to add or delete a	dditional filters.
🔗 Processing				
動 Sent	MessageLabs	Postini	Barracuda	SpamAssassin
	Outlook	Gmail	Mobile Me	Sender Policy Framework
	Sender ID	GMX	Hushmail	FastMail
	Lycos	Mail.com		

When you click **New Spam Detection**, the module passes the message to the SAC, which handles the spam detection process. Sending the message and checking how different spam



filters react may take some time. To view the results collected so far, click the **Refresh** button:

	Run spam detection for: All subjects		New Spam Detection		View Older Reports @Spam Filters
<ul> <li>Wards</li> <li></li></ul>	In progress MessageLabs	cember 2011 at 14:51:12	N <sup>46</sup> Barracuda	SpamAssassin	© 0% results available () (1) (1) (1) (1) (1) (1) (1) (1) (1)
🔗 Processing 🕼 Sent	Sender ID	if Outlook	stee Gmail کی اور کی	Mobile Me	≷"≦ GMX
	Spam filter details: Mes	sageLabs			
	In progress.	Resources & Silecore Buzz			60
	Sitecore News				8

3. When you click the Refresh button, the tab displays the results that are ready so far:



Spam filters can return different types of results:

#### • Failed.

Your message will probably not pass this spam filter. In the **Spam filter details** section, you see suggestions of what you can do to avoid your message failing for this spam filter. Also, you can see the score of your message with this filter. Scores are a method used by spam filters to rate the likelihood of the message being caught in the spam filter. Not all spam filters use scores, and the scale used for the scores may differ between different spam filters.

Failed SPostini	Sender Policy Framework	😣 Sender ID		
Passed with comments	Barracuda	SpamAssassin	<b>a</b> Outlook	
Passed Gmail	Mobile Me	✓ GMX	✓ Hushmail	🖋 FastMail
Spam filter details: Postini				
😢 Web Insites June 2011: R	esources & Sitecore Buzz			
Failed with a Postini score of	0.01684.			
	not use SSL. Replace "http://" with SSL. Replace "http://" with "https			ammy.

• Passed with comments.

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Your message will probably pass this spam filter. In the **Spam filter details** section, but the spam filter has provided suggestions for actions you can take to improve the likelihood of successfully delivering your mails to your recipient's inbox. Also, you can see the score of your message with this filter. If you message is in the **Passed with comments** state, this means that the score of your message is higher that the default threshold for this filter, but the comments will help you to considerably increase you score and make your message more trustworthy for this particular filter.

assed				
🖋 Gmail	Mobile Me	SMX GMX	FastMail	V Lycos
in progress				
pam filter details: Ou	look			
Web Insites June 201	: Resources & Sitecore Buzz			
Passed with a Outlook sco	re of 2.			
ou've used the phrase "l	Dear (something)" within your e	email, this is very common in spam	emails, you should consider re	moving the word "Dear".

Note: spam filter providers may occasionally change their score thresholds.

• Passed.

Your message will pass this filter.

o In progress.

Your message is being tested against this spam filter. Click **Refresh** to get the latest results.

o Error.

An error occurred while processing your request. Performing a new spam detection later may yield a successful result.

If you run the spam detection for all message subjects that are available for the current message, you see the results for each subject in the **Spam filter details** section:

MessageLabs	MessageLabs					
Passed						
💞 Gmail	Mobile Me	SMX GMX	؇ Hushmai			
Spam filter details: B	arracuda					
Web Insites June 20	11: Resources & Sitecore Buzz					
Passed with a Barracud	a score of 0.74.					
Your email contains HTM	I content. This won't usually ca	use you to fail any coam filters				
	1L content. This won't usually ca is mostly HTML. Be sure to inclu		nessage			
Your multipart message		de a full plain text version of your n	nessage			
Your multipart message	is mostly HTML. Be sure to indu	de a full plain text version of your n	nessage			
Your multipart message Your message contains	is mostly HTML. Be sure to inclu content in both HTML and plain	de a full plain text version of your n	nessage			
Your multipart message Your message contains Sitecore News Passed with a Barracud	is mostly HTML. Be sure to indu content in both HTML and plain a score of 0.74.	de a full plain text version of your n text	nessage			
Your multipart message Your message contains Sitecore News Passed with a Barracud Your email contains HTM	is mostly HTML. Be sure to indu content in both HTML and plain a score of 0.74. 1L content. This won't usually ca	de a full plain text version of your n text use you to fail any spam filters.				
Your multipart message Your message contains Sitecore News Passed with a Barracud Your email contains HTM Your multipart message	is mostly HTML. Be sure to indu content in both HTML and plain a score of 0.74. 1L content. This won't usually ca	de a full plain text version of your n text use you to fail any spam filters. de a full plain text version of your n				

If you run the spam detection for one subject, you only see the results for that subject.



#### How to Run the Spam Detection for a Particular Subject

Note: you can run the spam detection for a particular subject using the **Run spam detection for** field in the **Spam Detect** tab:

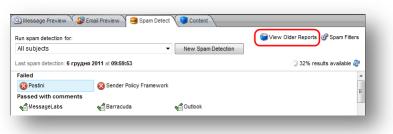
All subjects	-	New Spam Detection
All subjects		
Veb Insites June 2011: Resources & Sitecore Buzz Sitecore News		

#### How to View Older Reports

You can view older reports that the module generated previously.

To view older reports:

1. On the Email Preview tab, click View Older Reports:



The module opens the dialog box where you can select an older report:

Spam Detect Report	
Select the the report you want to view.	
5 December 2011 14:51:12 (All subjects)	
2 December 2011 17:42:53 (All subjects)	
2 December 2011 17:42:43 (All subjects)	
1 December 2011 18:52:09 (All subjects)	
	OK Cancel

2. Select a report and click OK.

#### How to Select Spam Filters

You can select the email clients that you want the module to generate previews for.

To select email clients:

1. On the Email Preview tab, click Spam Filters:

Run spam detection for:			🝟 View Older Reports 🎯 Spam Filters
All subjects		New Spam Detection	
Last spam detection: 6 грудня	a 2011 at 09:59:53		🔅 32% results available 🍣
Failed			
🔞 Postini	😣 Sender Policy Fram	nework	=
Passed with comments			
MessageLabs	Barracuda	outlook	



The module opens the dialog box where you can select spam filters:

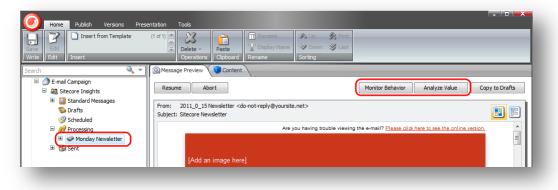
Select span filters to check. Available:	•	Selected:
Available:	•	
		MessageLabs
	9	Postini
		Barracuda
		👷 SpamAssassin 🌸 Sender Policy Framework
		Sender ID
		Outlook
		ger Gmail
		Mobile Me
		gmx GMX
		🚖 Hushmail
		🚖 FastMail
		🚖 Lycos
		Amil.com
Apply to all messages		
		OK Cancel

Select email clients and click OK.

#### 3.1.5 How to Monitor Behavior and View Analytics Reports

To monitor the subscriber behavior or view the reports related to a message:

- 1. Select a target audience.
- 2. In the *Processing* or the *Sent* folder, select a message.
- 3. Click **Monitor Behavior** to monitor the state of the dispatch process and behavior of the subscribers who have received the mail.





The module opens the engagement plan monitor.

* 5 Monitor - Monday Newsletter Home View Evont Refresh Image Data			
Monday Newsletter Number of visitors 21	The server has not started sending a The message to these recipients.	0 % nd not Complete eserver is in the process of erating and sending a message to se recipients.	Invalid Address The server received a failure message for these recipients.
6	Inactive Recipients 28.6 % Message Unopened		Clicker Hiroley Massing

#### Note

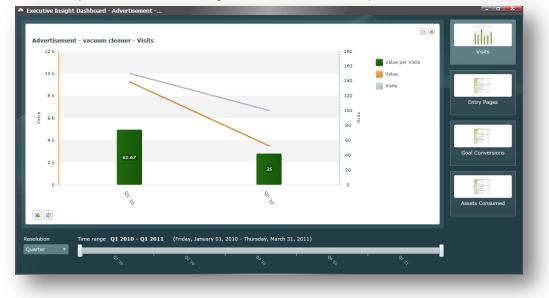
When using Plain Text Message, the **Visit Reports** will mark all messages as unopened even if they have been opened.

4. Click Analyze Value to view the analytics reports related to the message.





The module opens the Executive Insight Dashboard with the reports.



### 3.1.6 How to Use ECM Actions

The Email Campaign Manager contains actions that can be used in an engagement plan and applied to visitors who meet the conditions specified for the previous state of the plan:

• Edit Email Audience

The Edit Email Audience action subscribes a visitor to (or unsubscribe a visitor from) one or more Target Audiences.

• Send Email Campaign Message

The Send Email Campaign Message action sends a standard email campaign message to a website visitor.

To set the Edit Email Audience action:

- 2. Select a target audience.
- 3. In the *Drafts* folder, select an existing message or create a new newsletter message:

Search	🔍 🔽 🕼 Message Preview 🔪 🥵 Email Preview 🔪 🧝 Spam Detect 🔨 💟 Content
Compaign     Semail Campaign     Semail C	Edit Test Dispatch Messages Edit Engagement Plan
Construction of the second secon	From:     Sitecore Insights <do-not-reply@yoursite.net>       To:     10 subscriber(s)       Subject:     Sitecore Newsletter</do-not-reply@yoursite.net>
୍ରତ Scheduled ଡ଼ିମ Processing ଞ ପ୍ରୌ Sent	Are you having trouble viewing the e-mail? Please click here to see the online version. [Add an image here]
_	



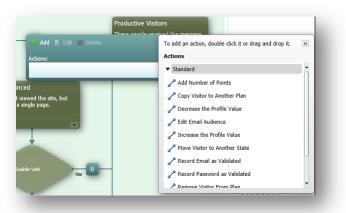
4. In the **Message Preview** tab, click **Edit Engagement Plan**. Sitecore opens the **Designer** window.

Designer Home View		_	
Save Export File Editing		em Text Colors	
<ul> <li>Standard</li> </ul>	Thursday Newsletter		
Is Email Address Validated	Delivery Initialized		Inactive Recipients
Is Email Link Clicked	Recipient Queued	Send not Complete	Message Unopened Me
🔷 Is Email Opened	The server has not started sending a	The server is in the process of	The server has sent the message to The
> Is Password Validated	message to these recipients.	generating and sending a message to these recipients.	these recipients.
Time Spent in Automation State			
	Send Failed	Active Recipients	
	Invalid Address	Clicked Through Message	
	The server received a failure	These recipients have clicked on at	
	message for these recipients.	least one link in this message.	
	Soft Bounce		Pro
	Temporarily unable to deliver message to recipient.	Valuable visit	
→ Conditions		Yes	on i
		In	
Actions		No	
	Hard Dounco		Visitor Bouncod

5. Click the square box and the **Actions** dialog box appears.



6. Click **Add** and a dialog box appears.



This dialog box lists all of the actions that are available.

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7. In this dialog box, double click the Edit Email Audience action to add it to the Actions field.

Actions:
P Edit Email Audience

8. In the **Actions** dialog box, click **Edit** to configure the action.

Select the target audiences that the visitor should be opted out of. arget Audiences:	visitor should be subscribed to and the target audiences that the
ger Auderices. a ∑ E-mail Campaign a Newsletter Subsribers a Sitecore Insights	Subscribe To:
Send confirmation mail	
p://cms650r110602/sitecore/ 🕵 Local	OK Cancel

9. In the **Change Target Audience Subscriptions** dialog box, you can change target audiences to which the visitor is subscribed.

To subscribe a website visitor to a target audience:

- a. In the Target Audiences field, select a target audience.
- b. Click right arrow icon next to **Subscribe To** field. Selected target audience is displayed in the **Subscribe To** field.

To unsubscribe a website visitor from a target audience:

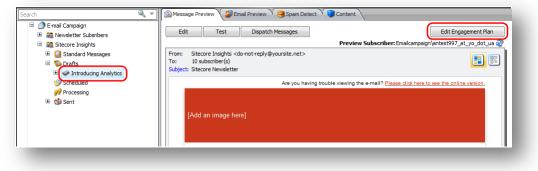
- a. In the Target Audiences field, select a target audience.
- b. Click right arrow icon next to **Opt-out Of** field. Selected target audience is displayed in the **Opt-out Of** field.
- 10. Click Ok to close the Change Target Audience Subscriptions dialog box.
- 11. In the Designer, click Save.

To set the Send Email Campaign Message action:

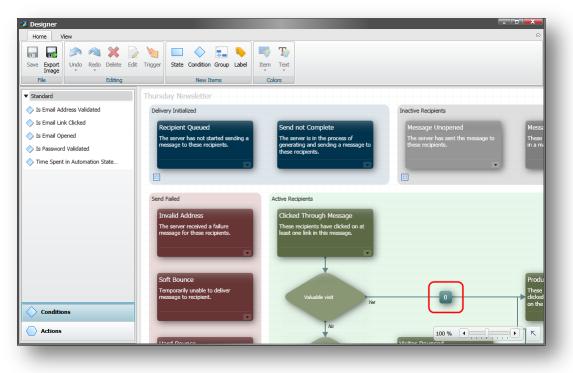
1. Select a target audience.



2. In the Drafts folder, select an existing message or create a new newsletter message:



3. In the **Message Preview** tab, click **Edit Engagement Plan**. Sitecore opens the **Designer** window.



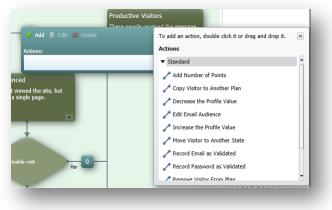
Standard messages are used to send a message to a single recipient at a time. You can extend the message plan to send a "Thank you for visiting our site" message to all visitors who produced value on the site (in the Productive Visitors state). The message could contain addresses of local stores and encourage them to visit the store to take advantage of an exclusive discount deal.

4. Click the square box and the **Actions** dialog box appears.





5. Click Add and a dialog box appears.

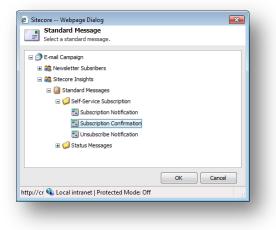


This dialog box lists all of the actions that are available.

6. In this dialog box, double click the *Send Email Campaign Message* action to add it to the **Actions** field.

-	These neonle received the mess
🕂 Add 🗋 Edit 🔉 Delete	🗶 duced
Actions:	
🥜 Send Email Campaign Me	ssage

7. In the Actions dialog box, click Edit to configure the action.



- 8. In the **Standard Message** dialog box, select a standard message.
- 9. Click **Ok** to close the **Standard Message** dialog box.

In the Designer, click Save.

### 3.1.7 How to Copy a Message Sent Previously

There are three places where your message can be stored after you click **Dispatch Messages**, depending on the options you choose.

The messages can be stored in the:

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• Scheduled folder.

This folder contains the messages which are scheduled to be sent at a later time.

• Processing folder.

This folder contains the messages which are being sent at the moment or those which have been paused.

• Sent folder.

This folder contains the messages which have been already sent.

Search	_ 🔍 🗕
🖃 🔿 Email Campaign	
Sitecore Insights	
🗉 道 Standard Messages	
🗉 🛸 Drafts	
Scheduled	
🔗 Processing	
🗉 動 Sent	

You can copy a message from one of these folders and send it again or edit it.

To copy a message:

- 1. Select the message in a folder (*Drafts, Processing,* or Sent folder).
- 2. On the Message Preview tab, click Copy to Drafts.

Home         Publish         Versions         I           Home         Publish         Versions         I           Home         Insert from Template         Insert from Template         Insert from Template           Save         Edit ~         Insert from Template         Insert from Template	sentation Tools (1 of 1) ← Delete Operators Cipboard Cipboard Cipboard Cipboard Rename Rename Rename Rename Softing □ Softing □	
rch Q ▼	Message Preview     Span Detect     Orenent     View Reports     From: Sitecore Insights <alio@sitecore.net>     Reply To: <alio@sitecore.net></alio@sitecore.net></alio@sitecore.net>	Copy to Drafts
<sup>(2)</sup> Scheduled <sup>(2)</sup> Processing <sup>(2)</sup> <sup>(2)</sup>	Subject: Web Insites August 2009: Introducing the OMS Are you having trouble viewing the e Sitecore Web Insites	-mail? <u>Please di</u>

### 3.1.8 How to Attach a File to a Message

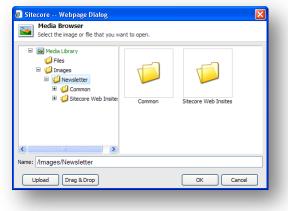
To attach a file to a message:

- 1. Select the message in the *Drafts* folder.
- 2. On the Content tab, in the Options section, in the Attachments field, click Add.

Search	Message Preview  Content  Con
_	



3. In the **Media Browser** dialog, select the file to attach.



To upload a new file to the media library, click **Upload**.

## 3.1.9 How to Add a \$token\$ to the Message Text

The ECM module supports tokens that you can use to personalize your messages. For instance, in the beginning of the message you can insert the line "Dear \$name\$!" and when the message is sent, this token is substituted with the actual name of the subscriber. You can use tokens in both the message subject and the message body.



By default, the following tokens are available: \$email\$, \$fullname\$, \$name\$, \$phone\$. The
module replaces a token with the appropriate value from the user profile and put it in the email.

You can either insert the tokens by typing them in the message:



Or you can use the **Insert Field** button which is available when you edit the related item.

To insert a token using the **Insert Field** button:

1. Start editing a message.



2. Place the cursor in the field in which you want to insert a token. Sitecore displays the context menu. In the menu, select **More, Edit the related item**.



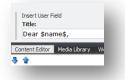
Sitecore opens the related item using the ribbon.

Home	Navigate	Review	Analyze	Publish	Versions
Save Save/Close	Edit → Edit	Insert f	rom Template	(1 0	f 1) 🔹 🔽 T Dupli Oper
Content	j Luit j	anaci e sa		_	l oper
Insert User Field	D				
Title: Dear ,					
Content Editor Me	edia Library	Workbox	_	-	
• 🔶				A	re you having t
	13				

3. In the **Content** tab beneath the ribbon, place the cursor where you want to insert a token and click **Insert User Field**. Select the token from the list of available tokens.



The Rich Text Editor inserts the token at the location of the cursor.



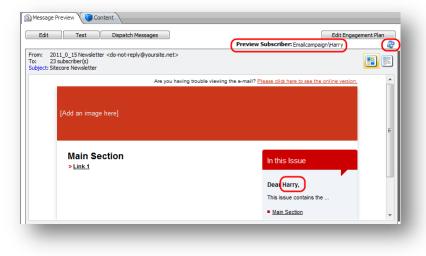
4. On the ribbon, click **Save/Close**. Sitecore saves the item and closes the ribbon.





Alternatively, you can type the token directly into the message.

To preview the personalized message for different subscribers, on the **Message Preview** tab, click the **Refresh** button ( ) to the right of the **Preview Subscriber** field.



## 3.1.10 How to Add a \$token\$ to a Message Subject

To add a token to a message subject:

- 1. Select a message.
- 2. On the Message Preview tab, click Subject.

Edit	Test	Dispatch Messages
m: Sitecor 23 sub		o-not-reply@yoursite.net>
ject: stecor	enewsietter	
ject: Stecor	enewsietter	Are you having trouble vi
ject: stecor	enewsietter	

Sitecore starts the Message Subject dialog box.

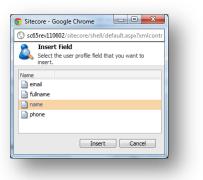
	core - Google Chrome 55rev110602/sitecore/shell/default.aspx?xmlcontrol=EmailCampaign.Confic	
S sa		juresubjectiviv restr
P	Message Subject Enter more than one subject to test the effectiveness of different message subj	ects.
		Insert User Field
Messag	ge Subject(s):	English
Hello		
If you	enter more than one subject, an A/B test will be automatically created for this mes	sage.
	OK	Cancel



3. In the **Message Subject** dialog box, enter the subject text, ensure that the cursor is in the place where you want to insert a token and then click **Insert User Field**.

💿 Sitecore - Google Chrome	
Sc65rev110602/sitecore/shell/default.aspx?xmlo	control=EmailCampaign.ConfigureSubjectMVTest/
Message Subject Enter more than one subject to test the effect	veness of different message subjects.
Message Subject(s):	Insert User Field English
Hello	
If you enter more than one subject, an A/B test will be	automatically created for this message.
	OK Cancel

4. Select the user profile field that you want to insert. Click Insert.



The user field token is in the message subject now:

Sitecore - Google Chrome	
sc65rev110602/sitecore/shell/default.aspx?xmlcontrol=Email	ilCampaign.ConfigureSubjectMVTest
Message Subject Enter more than one subject to test the effectiveness of diff	erent message subjects.
	Insert User Field
Message Subject(s):	English
Hello \$name\$	
If you enter more than one subject, an A/B test will be automatically	created for this message.
If you enter more than one subject, an A/B test will be automatically	created for this message.

5. Click OK.

# 3.1.11 How to Set "alternate text" for a Message (Shown in non-HTML E-mail Clients)

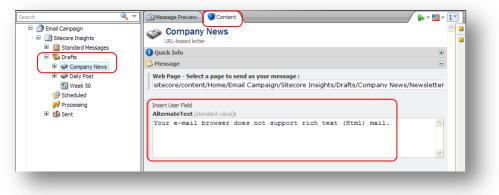
Alternate text is a plain text version of the message. This text is used when the program that the subscriber uses to read the message cannot read the HTML version of the message.

To set the alternate text:

1. In the *Drafts* folder, select the message.



2. In the right-hand pane, on the Content tab, select the Alternate Text field.



- 3. Edit the text.
- 4. Save the message.

# 3.1.12 How to See an Estimate of How Long It Takes to Send a Message

It may take a long time to send all the messages depending on the number of subscribers. You use the *Test Message* dialog to know the estimate of how long the dispatch process will take.

To get the estimate, the module sends a small number of messages to a recipient (or several recipients). While the messages are being sent, the module gathers statistics, estimates how long it will take to send all the messages, and shows the *Dispatch Statistics* report afterwards.

To perform the test and see the dispatch statistics:

- 1. Select a message.
- 2. On the Message Preview tab, click Test. Sitecore opens the Test Message dialog.

st Message			
Specify the address that the test messa	age should be sent to.		$\succeq$
Send To: alko@sitecore.net, kok	oshyn@amail.com		
	oonynaginalioonn		
Test Performance			
	644 A 4 4 4 4 4 4 4 4 4		
This wizard will monitor the perform about the entire dispatch process.	lance of this test and use this s	imple to generate statistics	
A small number of messages will be	sent to the address you specifi	ed.	
Sample Size: 4			
This server is configured to use 1 se	ending thread(s).		
	< Back	Next > Cance	

- 3. Select the **Test Performance** check box.
- 4. In the **Send To** field, enter the e-mail addresses that you would like to use for testing. If you enter more than one e-mail address, place them in a comma separated list.
- 5. In the **Sample Size** field, specify the number of messages that should be sent to each e-mail address.
- 6. Click Next and the test messages are sent to the specified address(es).



After the test messages have been sent, you will see the **Dispatch Statistics** dialog box.

spatch Statistics	
The messages have been sent.	
Result:	
Messages sent: 4	
Messages not sent: 0	
Average time required to:	
Generate a message: 00:00:00.059	
Send a message: 00:00:00.017	
Estimated time required to:	
Generate messages for this list: 00:00:00.26	9
Send messages to this list: 00:00:00.07	79
Total: 00:00:00.34	19
The actual time required to dispatch this messa load during the dispatch process.	age to all subscribers may vary depending on server
	< Back Next > Cancel

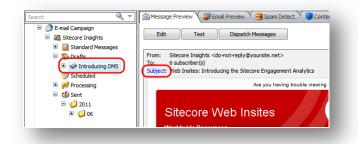
This page contains the following information:

- The number of messages that were sent and were not sent.
- o The average time required to generate a single message and send it.
- The estimated time required to generate the messages for the whole subscriber list, send the messages to this list, as well as the total time required to generate and dispatch the messages to the whole list of subscribers.
- 7. Click **Next** to finish the test.

## 3.1.13 How to Send a Message to a Limited Set of Subscribers and Perform a Subject Test

To send a message to a limited set of subscribers and perform a subject A/B test:

- 1. Select the message.
- 2. On the Message Preview tab, click Subject.



Sitecore starts the **Message Subject** dialog box.



3. In the **Message Subject** dialog box, in the **Message Subject(s)** fields, enter the subjects you want to test and click **OK**.

	Message Subject	t			
P	Enter more than one subjects.	subject to test	the effectiven	ess of different r	nessage
					Insert User Field
Messag	ge Subject(s):				English
Web	Insites: Introducin	g the Sitecore	e Engageme	nt Analytics	
Broch	hure and Demo				
Sitec	ore News				
f you o	enter more than one : ge.	subject, an A/B t	est will be aut	omatically create	d for this

Now the subject A/B test is configured for this message. The **Subject** link changes to **Subject** (1 of 3) on the **Message Preview** tab.

aign Insights	Edit	Test
dard Messages		
s	From:	Sitecore Ins
troducing DMS	To:	6 subscriber
duled	Subject (1 o	f 3): Web Insites
eeina		

- 4. On the **Message Preview** tab, click **Dispatch Messages**. Sitecore starts the **Dispatch Message** wizard.
- 5. In the Limited Number of Subscribers dialog box, select the Dispatch to Limited Set of Subscribers check box and in the Quantity field specify the percentage of subscribers that you want to use in the test. Click Next to continue.

	mber of Subsc whether to send		bscriber or to a limited numbe	r of subscribers.	$\bigcirc$
	ecide to send the m subset of subs		mber of subscribers, the wiza	rd will send messa	ges to
	oatch to Limited S antity: 30	Set of Subscribers			
Subject	A/B test is config	gured for this message.			
			< Back Ne:	(t > Can	cel

The subscribers for this subset are chosen randomly. The actual number of subscribers in the subset is shown in brackets.

6. In the Launch Message Dispatching dialog box, select the Now option and click Start. Sitecore sends messages to the subset of subscribers.



Sitecore moves the message to the *Processing* folder.

Search 🔍 🔻	🕲 Message Preview 🛛 🥵 Email Preview 🔪 🥶 Spam Detect 🗸 🧊 Content
Comparison     C	Pause         Abort         Monitor Behavior         Analyze Value         View Test Results         Copy to Drafts           From:         Sitecore Insights <do-not-reply@yoursite.net>         Sitecore Insights <do-not-reply@yoursite.net>         Image: Sitecore News         Image</do-not-reply@yoursite.net></do-not-reply@yoursite.net>
Scheduled	Subject: Sitecore News Are you having trouble viewing the e-mail? Please click here to see the online vers
(ii) Introducing DMS it) C∐ Sent	Sitecore Web Insites Worldwide Resources
	Introducing the Sitecore Analytics

When Sitecore finishes sending messages to the subset of subscribers, this message remains in the *Processing* folder until you resume the dispatch process or abort it.

Give subscribers some time to read the message and react to it. When you think that enough time has passed for the subscribers to react to the message, view the test results.

To view the test results, click the View Test Results button.

### 3.1.14 How to View the Message Subject Test Results

To view the message subject test results:

- 1. Select a target audience.
- 2. In the *Processing* or the *Sent* folder, select a message.

	🖾 Message Preview 🗸 🥵 Email Preview 🗸 🥃 Spam Detect 🔨 🝞 Content	
🖃 🔕 E-mail Campaign	Pause Abort Monitor Behavior Analyze Value View Test Results	Copy to Drafts
Sitecore Insights     Definition     Standard Messages	From: Sitecore Insights <do-not-reply@yoursite.net> Subject: Sitecore News</do-not-reply@yoursite.net>	
Scheduled	Are you having trouble viewing the e-mail? Please click here to	
Introducing DMS	Sitecore Web Insites	core
	Introducing the Sitecore Analytics	

3. In the **Message Preview** tab, click **View Test Results**. Sitecore opens the **Message Subject Test** dialog box.

Message Subject Test This table shows the relative effectiveness of each message sul per visit. Select the test winner and clck "Stop the Test" to stop send the message with the selected subject to all the remaining	the message subject test and	
otal number of test emails sent: 3 n equal number of emails has been sent with each subject.		
Subject	Value/Visit	
Web Insites: Introducing the Sitecore Engagement Analytics	18.75	
Brochure and Demo	0	
Sitecore News	0	
[	Stop the Test Canc	el



4. Select the test winner and click **Stop the Test** to stop the message subject test. Click **Resume** to send the message with the selected subject to all the remaining recipients.

## 3.1.15 How to Schedule a Message to be Sent at a Specific Time

To specify that a message should be sent at a specific time:

 In the Dispatch Message wizard, in the Launch Message Dispatching dialog box, select the Later option. After you select it, you will be given access to the Delivery Date and Time field, where you can set the time for the dispatching.

aunch Message Dispate					
Decide when the dispat	ch process should b	e started.			$\geq$
Launch Dispatching					
Now - begin the dispat	ch process immediat	tely.			
Later - begin the dispa	tch process at the s	pecified time.			
Date and Time					
5/14/2010 💌	5:58 PM 💌				
is message will be sent to	approximately 4 sub	oscribers.			
		ſ	< Back	Start >	Cancel
		6			

- 2. In the **Delivery Date and Time** field, set the time for the dispatching.
- 3. Click **Start**, and the message is placed in the *Scheduled* folder. It stays there until the scheduled time, and then it is dispatched.



When the message is in the *Scheduled* folder, you can dispatch the message immediately, cancel the message, or change the time of the scheduled dispatch.

To change the schedule of a message:

1. In the *Scheduled* folder, select the message.

arch 🔍	Message Preview     Content	
🗏 🔿 E-mail Campaign	Cancel Dispatch Now	Copy to Drafts
Sitecore Insights		
🗉 📋 Standard Messages		Schedule for Processing: 5/14/2010 5:58 PM
💿 Drafts	From: Sitecore Insights <alko@sitecore.net></alko@sitecore.net>	
😑 🧐 Scheduled	To: 4 subscriber(s)	
🗉 🧼 Company News	Reply To: <alko@sitecore.net></alko@sitecore.net>	
Processing	Subject: Sitecore Newsletter	
a rioccasing		

- 2. To dispatch the message immediately, on the **Message Preview** tab, click **Dispatch Now**.
- 3. To cancel the dispatch of the message, on the **Message Preview** tab, click **Cancel**. Sitecore moves the message to the *Drafts* folder.
- 4. To change the time of the scheduled dispatch, click **Schedule for Processing**.

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## 3.1.16 How to Translate a Message into a Different Language

This section describes how to translate a message into a different language.

#### Note

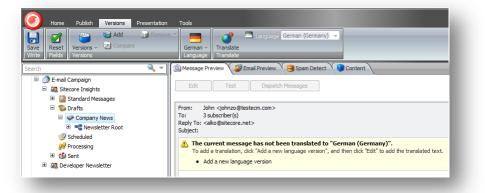
In this example we assume that there are two languages configured in your Sitecore installation – English and German. Your system administrator can configure an additional language for you.

To translate a message into a different language:

- 1. Select the message.
- 2. On the **Versions** tab, in the **Language** group, select the language that you want to translate the message to. In this example, we are translating to German:

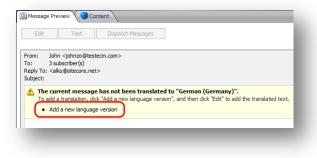
Home Publish Versions Presentation Reset Versions - W Compare Versions - W Compare Versions - W Compare		
Stecore     Image: Comparison of the com	German (Germany) : Deutsch (Deutschland) 0 versions.	
<i>에</i> Processing ඔ ∰ Sent ඔ ஹ Developer Newsletter	More Languages	111? 
	Hello! This is the English version. ≻ <u>Link1</u>	J

If you have not created any versions of the message in the German language yet, you get the message: *The current message has not been translated to German (Germany)*.





3. On the Message Preview tab, click Add a new language version.



Sitecore creates the version of the message in German language and opens it in the **Message Preview** tab:

Home Publish Versions Presentation	
Search     ▼       □          ⊕ E-mail Campaign        □          @ Sitecore Insights        ⑧          @ Sitecore Insights        ⑧          @ Sitecore Insights        ⑧          @ Sitecore Insights        ⑧          @ Standard Messages        ◎          Drafts        □          @ Company News        Ø          @ Newsletter Root        Ø          % Scheduled	Message Preview     Messages     Content     Edit     Test     Dispatch Messages      From: John < johnzo@testecm.com>     To: 3 subscriber(s)     Reply To: <ako@sitecore.net>     Subject:     Subject:</ako@sitecore.net>
er Schouled er Processing Bi ∰ Sent Bi ∰ Developer Newsletter	[Add an image here]
	•

4. On the **Message Preview** tab, click **Edit**. Edit the message in German and then click the **Save** button and then click **Close**.

	San in the million	ml_title" key="n	F			<u>S</u> afety ▼ T <u>o</u>	ois 👻 🕜	-
Home	Advanced Ex	perience View	v				~	<b>^</b>
Edit Preview Mode	- Component	t Insert I	G My Items Lock ✔ Workbox Edit		Publish Publish	Close		
34 -					[No text in f	ield] [No text in fie	eld]	
	More ▼ O aus Deuts tin field]	schland!		<u>s</u>	No text in fie	id]		E
G Hall (No tex	o aus Deuts	schland!			No text in field No text in field]			Ш



Now you have the versions the message in two languages. You can switch between the languages using the **Language** group of the **Versions** tab.

	Tools
Save Reset Versions	German V Translate Company Latest Company
Write Fields Versions	English : English 1 version.
E-mail Campaign     Sitecore Insights     Gli Standard Messages	German (Germany) : Deutsch (Deutschland) 1 version.
So Drafts     So Company News	
Image: Processing       Imag	More Languages
	Hallo aus Deutschland! >

## 3.1.17 How to Insert External Links in Messages

When you insert links to external websites in ECM messages, it is important that you include the scheme prefix, for instance:

```
http://
https://
```

For example, a link to the sitecore.net website should look like this: http://www.sitecore.net.

Sitecore Webpage Dialog		-
B I ∐ ≣ ≣ ≡ 📰	] 汪 汪 律 律 abe ×: ×'   A * ③ *   量 🛄	
	📄 Hyperlink Manager	
	Hyperlink Anchor E-mail	
	URL http://www.sitecore.net	
	Link Text	<b>-</b>
	LINK TEXL	

If you don't include the scheme prefix, ECM will treat this link as an internal link. For instance, if you insert a link sitecore.net, ECM will look for a page called sitecore.net on your website.

You can insert all types of scheme prefixes in your emails (for example, ftp://, mailto:) but ECM will only support Analytics tracking to the following prefixes:

http:// https://



## **Chapter 4**

## **Using E-Mail Campaign Reports**

This chapter describes how to use the E-Mail Campaign Reports.

This chapter contains the following sections:

- Accessing the Reports
- Frequently Asked Questions



## 4.1 Accessing the Reports

The E-Mail Campaign Manager contains a number of marketing reports.

To access the reports related to a message:

- 1. Select a target audience.
- 2. In the *Processing* or the *Sent* folder, select a message.

🔊 E-mail Campaign	Resume Abort	Monitor Behavior Analyze Value Copy to Drafts
🖃 🎎 Sitecore Insights	Resume Abort	Monitor Benavior Analyze Value Copy to Drarts
🗉 📋 Standard Messages		
💫 Drafts	From: Sitecore Insights <do-not-reply@yoursite.net></do-not-reply@yoursite.net>	
iggi Scheduled	Subject: Sitecore Newsletter	
Processing	Are you having t	trouble viewing the e-mail? Please dick here to see the online version.
🗉 🧼 Sitecore Insights		
🗉 🧼 Introducing the OMS		
動 Sent	[Add an image here]	

3. In the **Message Preview** tab, click **Monitor Behavior** to open the engagement plan monitor and monitor the subscriber behavior:

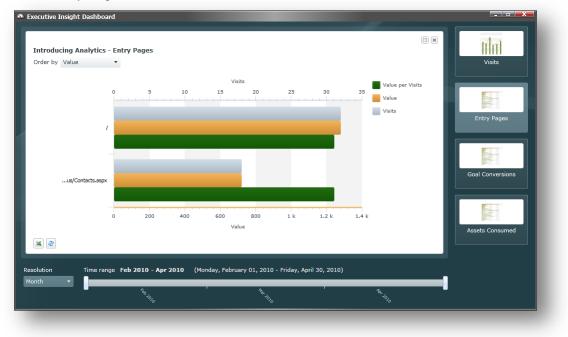


4. In the **Message Preview** tab, click **Analyze Value** to view the analytics reports related to the message:

E-mail Campaign Sitecore Insights	Resume Abort	Monitor Behavior Analyze Value Copy to Drafts
<ul> <li>Gandard Messages</li> <li>Drafts</li> <li>Scheduled</li> </ul>	From: Sitecore Insights <do-not-reply@yoursite.net> Subject: Sitecore Newsletter</do-not-reply@yoursite.net>	
Processing     Sitecore Insights     Sitecore Insights	Are you	having trouble viewing the e-mail? <u>Please click here to see the online version</u>
🕑 Sent	[Add an image here]	



Sitecore opens the **Executive Insight Dashboard** containing various analytics reports such as *Visits*, *Entry Pages*, *Goal Conversions* and so on.





## 4.2 Frequently Asked Questions

This section contains some common marketing questions and explains how to use the ECM reports to answer them.

## 4.2.1 How Many Subscribers Have Opened a Message?

Answer: Use the Engagement Plan Monitor, the Message Opened state.

The **Message Opened** state shows the number of subscribers who have opened the message.

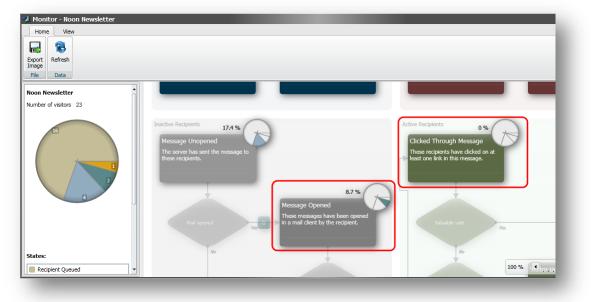
Honitor Home View Export File Data	
Introducing DMS	Introducing DMS
Number of visitors 13	Delivery Initialized
	Recipient Queued The server has not started sending a message to these recipients. Send not Complete The server is in the process of these recipients are started sending and
Message Opened Number of visitors 2	Message Unopened The server has sent the message to
Percentage of visitors 15.40 %	these recipients.
-	
States:	
Recipient Queued	15.4 %
Send not Complete	Message Opened
Invalid Address           Soft Bounce	These messages have been opened
Hard Bounce	Mail opened Yes in a mail client by the recipient.
Message Unopened	
Message Opened	No

In this example, two subscribers opened the message that is 15.40% of the total number of subscribers.



## 4.2.2 Are the Links in the Message Effective?

**Answer:** Use the **Engagement Plan Monitor**, compare the number of subscribers who only opened the message with the number of subscribers who clicked through the message.



The states of interest are:

Message Opened

The module puts recipients who opened the message but did not click links in it in this state.

• Clicked Through Message

If the visitor clicks a link in the message, this condition puts that visitor in the **Clicked Through Message** state.

In the following example, three subscribers only opened the message and four subscribers clicked links in it.



You can also use the **Entry Pages** report to analyze the effectiveness of the links in the message. For more information about the **Entry Pages** report, see the *Which Links in the Email Were* Most Effective? section.

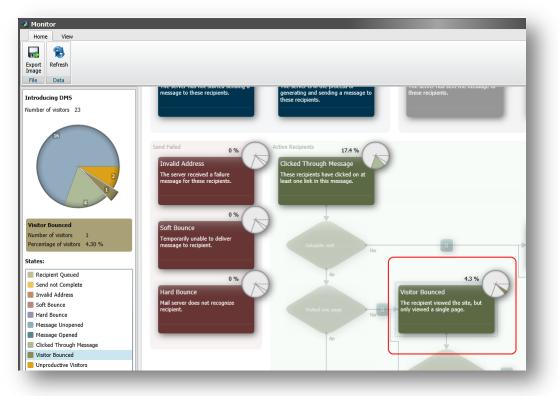
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# 4.2.3 Does Your Site Hold Subscriber Attention when They Visit the Site Through a Link?

Answer: Use the Engagement Plan Monitor, the Visitor Bounced state.

The **Visitor Bounced** state shows the number of subscribers who viewed only one page on the site and then left.



## 4.2.4 How Much Engagement Value did a Message Create?

Answer: Use the Executive Insight Dashboard, the Visits report.

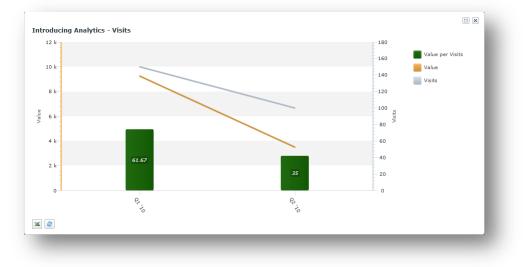
For more information about how to access the ECM reports, see the Accessing the Reports section.

Executive Insight Dashboard allows you to see value that was generated on the website. For example, the Entry Pages report displays how much value was generated by visitors who clicked on specific links in the email message.

The **Visits** report shows the *Value* (points accumulated), *Visits* (volume of traffic) and *Value per Visits* (relevance) of visits to your website for the selected time period. The relevance measures the



#### effectiveness of the campaign.



## 4.2.5 Which Links in the Email Were Most Effective?

Answer: Use the Executive Insight Dashboard, the Entry Pages report.

For more information about how to access the ECM reports, see the Accessing the Reports section.

The **Entry Pages** report shows the number of visits, the value, and the relevance that each link in the email created.

In the ECM, entry pages are the email links that recipients click to enter the website.



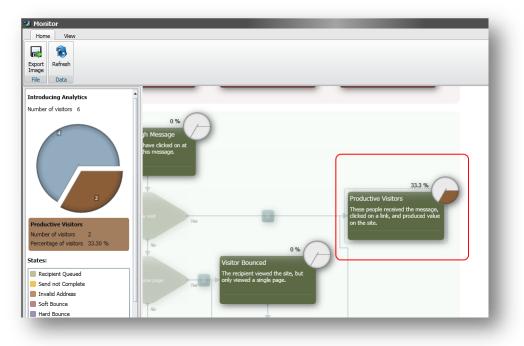
In this example, the home page produced more value than other pages. Click on the bars representing each entry page to see which websites referred the most traffic to those pages.



## 4.2.6 How Many Subscribers Produced Value?

Answer: Use the Engagement Plan Monitor, the Productive Visitors state.

The **Productive Visitors** state shows the number of subscribers who have received a message, clicked on a link in it, and produced value on the website.



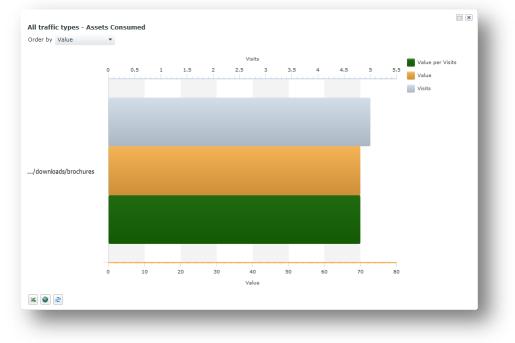
In this example, two of six recipients clicked on a link in the message and produced value on the website.

## 4.2.7 What Assets Did the Subscribers Consume?

Answer: Use the Executive Insight Dashboard, the Assets Consumed report.



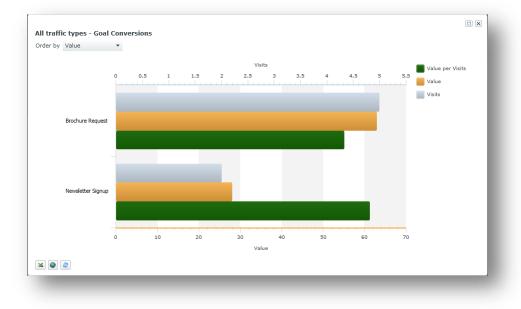
The **Assets Consumed** report shows how many assets the email campaign recipients consumed. For example, when a visitor downloads a brochure, the module registers an assets consumed event.



## 4.2.8 What Goals Did Message Recipients Convert?

Answer: Use the Executive Insight Dashboard, the Goal Conversions report.

The Goal Conversions report shows how much engagement value was created by visitors who entered the site from the email campaign and converted specific goals.





# **Chapter 5**

## **Reports Reference**

This chapter describes the E-mail Campaign Manager analytics reports.

This chapter contains the following sections:

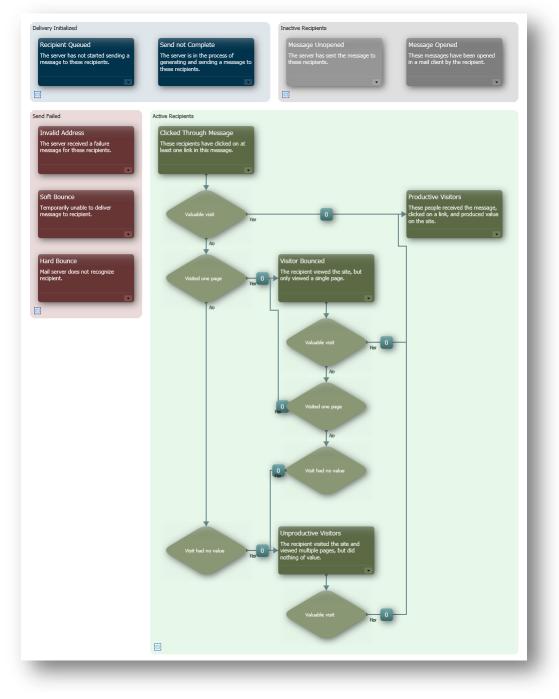
- The Message Engagement Plan
- The Executive Insight Dashboard Reports
- The Message Subject Test



## 5.1 The Message Engagement Plan

The ECM uses the message engagement plan to manage the sending process and track the behavior of the recipients of the message.

The following image shows the message engagement plan:



The following sections describe the groups, states and conditions that the plan contains.

## 5.1.1 Message Engagement Plan Groups

For the sake of convenience, the states of the engagement plan are sorted in groups.



The message plan contains the following groups:

#### • Delivery Initialized

This group contains recipients that are queued for dispatch. If the dispatch process is complete and there are recipients in this group left, that means that the module failed to send messages to those recipients. For more information, see *section Delivery Initialized*.

• Send Failed

This group contains recipients to whom the module could not deliver the message.

• Inactive Recipients

This group contains recipients to whom the message was successfully delivered.

• Active Recipients

This group contains recipients who opened the message and subsequently performed some related actions.

Let's take a closer look at each group.

### **Delivery Initialized**

This group contains recipients that are queued for dispatch.

Recipient Queued	Send not Complete
The server has not started sending a message to these recipients.	The server is in the process of generating and sending a message to these recipients.

It includes the following states:

Recipient Queued

This state contains recipients that are queued for dispatch. When you click the **Dispatch Messages** button, the module puts the recipients from the Opt-in role in this state. Then the module starts generating and sending messages to them.

Send not Complete

When the ECM generates a message for a recipient, it puts that recipient in the Send not Complete state. When the ECM delivers the message successfully to the recipient's inbox, the module moves that recipient to the Message Unopened State. A recipient may stay in the Send not Complete state for as short period as one second. If the module fails to deliver the message to the recipient's inbox, then that recipient stays in the Send not Complete state.

If the dispatch process is complete and there are recipients in the *Send not Complete* state, this means that the module failed to deliver the message to those recipients.

#### Note

The module handles the transitions between states in this group automatically; modifying states in this group could affect core functionality.



## Send Failed

This group contains recipients to whom the module could not deliver the message.

Invalid Address	
The server received a failure message for these recipients.	
	•
Soft Bounce	
Temporarily unable to deliver message to recipient.	
	•
Hard Bounce	
Mail server does not recognize recipient.	
]	

It includes the following states.

Invalid Address

When the ECM queries the message, it checks whether the recipient's email is a valid email address. The module uses a formula (a regular expression) for this purpose. If the address does not match the regular expression, the module moves the recipient to the *Invalid Address* state.

#### Soft Bounce

A bounce email is a message that is returned to the sender because it cannot be delivered for some reason. A soft bounce is a temporary failure and there is a chance that the recipient will receive the message eventually. For more information, see the *ECM Administrator's Guide*, section 5.6, Emails that Bounce and the Undelivered Max Setting.

#### Hard Bounce

A hard bounce means that the email is permanently bounced back to the sender because the address is invalid. A hard bounce is a permanent failure. For more information, see the *ECM Administrator's Guide, section 5.6, Emails that Bounce and the Undelivered Max Setting.* 

If a recipient appears in the **Hard Bounce** state, the module stops sending messages to this recipient from any target audience. If such recipient clicks a link in a message that has been sent to them eventually, then the module moves this recipient to the **Clicked Through Message** state.

For more information about messages that bounce, see the ECM Administrator's Guide, section 5.6, Emails that Bounce and the Undelivered Max Setting.

#### **Inactive Recipients**

This group contains recipients whom the module sent the message. Some of these recipients may have opened the message, but none of them performed any other actions (like clicking links) with the



#### message yet.

Message Unopened	Message Opened
The server has sent the message to these recipients.	These messages have been opened in a mail client by the recipient.

If a recipient clicks links in the message, or just opens it, the module moves that recipient further in the engagement plan.

If the module gets an error response from the recipient's email server, it moves the recipient to a state in the Send Failed group.

The Inactive Recipients group contains two states: Message Unopened and Message Opened.

#### **Message Unopened**

This state contains recipients to whom the module sent the message and who did not perform any actions with it yet.

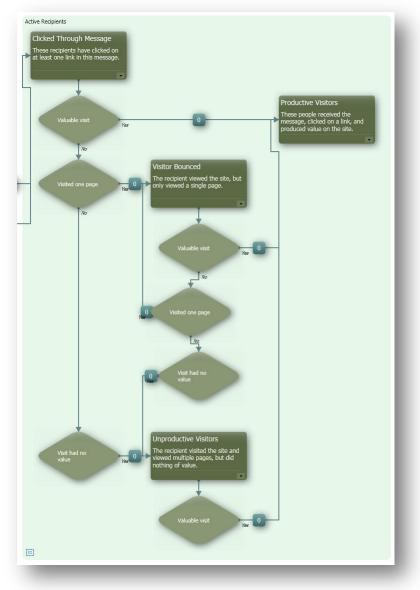
#### **Message Opened**

The module puts recipients who opened the message but did not click links in it in this state.



## **Active Recipients**

This group contains recipients who opened the message and subsequently performed some related actions.



The states in this group are triggered by the Session End page event.

Here is the description of the states in this group.

#### Clicked Through Message

If the visitor clicks a link in the message, the module puts that visitor in this state.

When a browser session of a visitor in this state ends, Sitecore evaluates the conditions associated with this state for that visitor.

The conditions associated with this state are:

#### • Valuable Visit

If the visitor achieved any value points after clicking links in the message, this condition puts that visitor in the **Productive Visitors** state. Otherwise, the module checks the **Visited One Page** condition.

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#### • Visited One Page

If the visitor visited only one page, that visitor is moved to the **Visitor Bounced** state. Otherwise, the module checks the **Visit had no Value** condition.

#### • Visit had no Value

If the visitor visited more than one page, but did not achieve any value points, that visitor is put in the **Unproductive Visitors** state.

#### **Visitor Bounced**

If the visitor visited only one page after clicking a link in the message, that visitor is moved to this state.

When a browser session of a visitor in this state ends, Sitecore evaluates the conditions associated with this state for that visitor.

The conditions associated with this state are:

#### Valuable Visit

If the visitor achieved any value points, this condition puts that visitor in the **Productive Visitors** state. Otherwise, the module checks the **Visited One Page** condition.

#### • Visited One Page

If the visitor visited only one page after clicking a link in the message, that visitor is moved to the **Visitor Bounced** state. Otherwise, the module checks the **Visit had no Value** condition.

#### • Visit had no Value

If the visitor visited more than one page, but did not achieve any value points, that visitor is put in the **Unproductive Visitors** state.

#### **Unproductive Visitors**

If the recipient visited the site and viewed multiple pages, but did nothing of value, Sitecore moves that recipient to this state.

When a browser session of a visitor in this state ends, Sitecore evaluates the conditions associated with this state for that visitor.

The conditions associated with this state are:

• Valuable Visit

If the visitor achieved any engagement value points, this condition puts that visitor in the **Productive Visitors** state. Otherwise, the visitor remains in the **Unproductive Visitors** state.

#### **Productive Visitors**

If the recipient generated some engagement value on the site, the module puts that recipient in this state.

This is the final state.



## 5.2 The Executive Insight Dashboard Reports

The Executive Insight Dashboard application provides you with marketing reports of an email campaign's effectiveness.

The ECM marketing reports include the following reports:

• Visits

This report shows the volume of traffic and the value points that were accumulated as the result of the current email campaign.

• Entry Pages

This report shows the Value, Visits and Relevance of visits to your website for specific entry pages. Entry pages for an email campaign are links in the email.

Goal Conversions

This report shows the value that was generated by goal conversions in the current campaign.

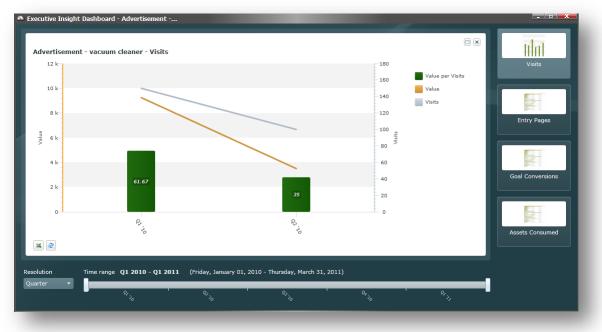
Assets Consumed

This report shows which assets were downloaded in the current email campaign and which led to the most valuable visits.

The following sections describe each report in detail.

## 5.2.1 Visits

This report shows the volume of traffic and the engagement value points that were accumulated as the result of the current email campaign.



The Value line shows the number of visits over time and the Visits line shows the number of visits.

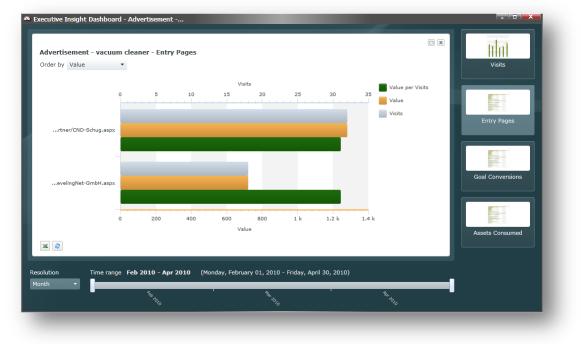
The bars show the relevance (value per visit). This measures the effectiveness of the campaign.

Use this report to get an overview of visits. This report lets you know quickly, how much engagement value your campaign generated over time.



## 5.2.2 Entry Pages

This report shows the *Value* (points accumulated), *Visits* (volume of traffic) and *Relevance* (Value per Visits) of visits to your website for specific entry pages (email links).



In ECM, entry pages represent links in the email.

The default view shows entry pages sorted by relevance.

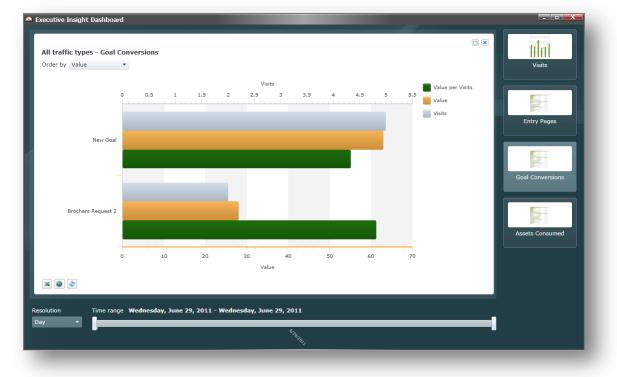
Use this report to help identify the following:

- The effectiveness of the links in the message.
- Landing pages that lead to the highest value.



## 5.2.3 Goal Conversions

This report shows the goals converted by visitors who entered the website by clicking on a link in an Email Campaign, and the engagement value in those visits.



The bars in this chart display the following information:

• Visits bar

Shows how many visitors who were part of the email campaign converted this goal.

• Value bar

Shows how much value visitors who were part of the email campaign and converted the goals generated during their visits.

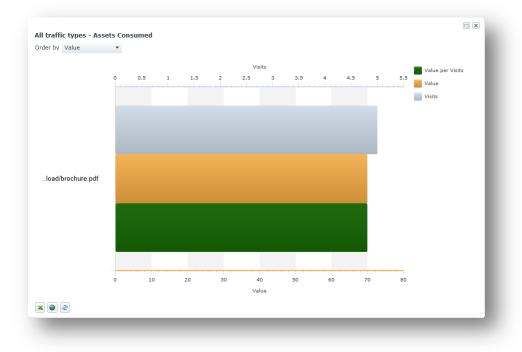
• Value per Visit

Shows the effectiveness of the goals for people who entered the website as part of this campaign.



## 5.2.4 Assets Consumed

This report shows which assets were downloaded in the current email campaign and which led to the highest value visits.



The term 'assets consumed' refers to visitors downloading brochures, white papers, video content, and other assets from the website during a visit. When a visitor downloads a brochure it shows a higher level of commitment on the website than just viewing pages.

The default view shows which assets visitors consumed the most during all value visits ranked by value.

The bars in this chart display the following information:

• Visits bar

Shows how many visitors who were part of the email campaign download this asset.

Value bar

Shows how much value this asset generated.

Value per Visit

Shows the value per asset consumed.



## 5.3 The Message Subject Test

When you perform a message subject test, Sitecore moves the message to the Processing folder.

Search 🔍 🔻	🙉 Message Preview 🛛 🥵 Email Preview 🗸 🥶 Spam Detect 🗸 🍞 Content			
<ul> <li>Stecore Insights</li> </ul>	Pause Abort Monitor Behavior Analyze Value View Test Results Copy to Drafts			
Image:	From: Sitecore Insights <do-not-reply@yoursite.net> Subject: Sitecore News</do-not-reply@yoursite.net>			
Scheduled	Are you having trouble viewing the e-mail? Please click here to see the online vers			
Processing     B      Introducing DMS     is     is Sent	Sitecore Web Insites			
	Introducing the Sitecore Analytics			

When Sitecore finishes sending messages to the subset of subscribers, this message remains in the *Processing* folder until you resume the dispatch process or abort it.

To view the subject test results, click the View Test Results button in the Message Preview tab.

Sitecore opens the **Message Subject Test** dialog box.

A Message Subject Test		
This table shows the relative effectiveness of each message su per visit. Select the test winner and click "Stop the Test" to stop send the message with the selected subject to all the remaining	o the message subject test ar	
otal number of test emails sent: 3 An equal number of emails has been sent with each subject.		
Subject	Value/Visit	-
Web Insites: Introducing the Sitecore Engagement Analytics	18.75	_
Brochure and Demo	0	
Sitecore News	0	
	Stop the Test Can	cel

The table in the dialog shows the relative effectiveness of each message subject in terms of the average value per visit.

You can use this to judge which subject was most effective and thereby select the winner. Usually the most effective subject in the test will also be the most effective subject or the rest of the emails. Select the test winner and click **Stop the Test** to stop the message subject test. Click **Resume** to send the message with the selected subject to all the remaining recipients.