

E-Mail Campaign Manager 2.1 for Sitecore CMS 6.6 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 <u>ECM Administrator's and Developer's Guide</u>.

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 content and design using Sitecore A/B testing tools.
- Get detailed Sitecore Analytics reports with user behavior tracking across e-mails and the website.
- o Utilize e-mail subscriber lists from CRM and other enterprise applications.
- o Manage self-service subscription forms on your website.

This document contains the following chapters:

- Chapter 1 Introduction Introduction to this guide.
- Chapter 2 Quick Start Guide Actions that you must perform to dispatch a message.
- Chapter 3 Creating Messages How to work with messages.
- Chapter 4 Managing Recipients How to create, import and export recipient lists.
- Chapter 5 Performing a Message Review Actions that you can perform to review a message before dispatching it.
- Chapter 6 Sending Messages How to send different type of messages.
- Chapter 7 Email Campaign Reports How to analyze email marketing campaigns using the Analytics reports.



Chapter 2

Quick Start Guide

This chapter guides you quickly through the activities involved in a typical email message dispatch.

This chapter contains the following sections:

- Accessing the Email Campaign Manager
- Creating a Message
- Building a Recipient List
- Reviewing a Message
- Sending a Message
- Reviewing Reports

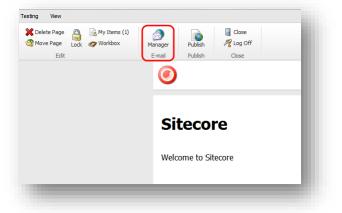


2.1 Accessing the Email Campaign Manager

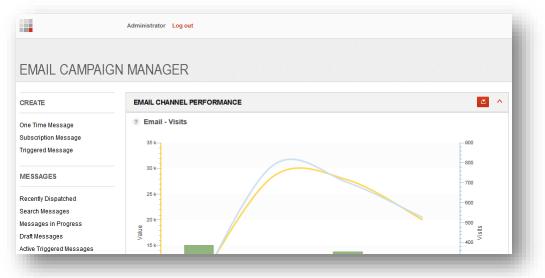
The first step to starting your email campaign is accessing ECM.

To access ECM from the Page Editor interface:

- 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.



For more information about accessing ECM, see Section 3.1, How to Access the E-Mail Campaign Manager.



2.2 Creating a Message

You must create your message before you send it.

This section describes how to create a message:

1. In the ECM application, in the CREATE section, select the Messages option.

CREATE	EMAIL CHAN
One Time Message	? Email - Vi
Subscription Message	35 k
Triggered Message	

ECM displays the dialog box with the available templates.

nport From				Î
<html></html>				
Use html file	Import Design			
			<html></html>	Е
Newsletter Message	Two-Column Message	One-Column Message	Simple HTML Message	
Т				
Diain Tast Magazana	Dra aviating Daga			-

2. Select a message template. For example, the **Newsletter Message** template.

To know more about other message creation options, see Section 3.2.1, Message Templates and Import Options.



ECM creates the message and opens it:

ewsletter M	coodyc						EN 🛔	ACTIONS 🗳
Back						Save	MESSAGE INFO)
							Message Type	One Time
ENERAL RECI	PIENTS	MESSAGE	REVIEW	DISPATCH	REPORTS		Status	Drafts
							Dispatch	Not Initiated
GENERAL MESSAG	E INFO					^	Total Recipients	100
Description Campaign Category	/Emails							
						More \checkmark		
SENDER DETAILS						^		
From Name	Alex Anders							
From Email	no_reply@s	sitecore.net						
						More 🗸		

3. Give the message a name to identify it and edit the fields in the General tab, for instance, enter sender information.

Now you can start to edit your message and configure various options, such as recipient lists and dispatch options.

For more information about ECM message types, see Section 3.8, ECM Message Types.

For more information about importing a design, see *Section 3.12, Importing a Design from a Webpage*.



2.3 Building a Recipient List

You can import a Sitecore list and use it as a recipient list or import a recipient list from a file. To build a new recipient list using a Sitecore user list:

- 1. Select the new message and click the **Recipients** tab.
- 2. In the Recipients tab, in the Recipient Build list tab, click Build new recipient list.

Recipients Build lis	t Recipie	ents View list	Unsubscribers I	Build list	Unsu	bscribers View list	
	ſ	Build Build new recip	new list or select an	existing one Use existi			

3. Click Import List.

List Name:	Emailcampaign\Newsletter Message Recipient list Member11	
Emails	0	
	Add new list source Import List IMPORT LIST Import recipients from a file Import Sitecore List	

4. In the **Import List** dropdown list, click **Import Sitecore List**.



5. In the Edit User Roles dialog box, select Sitecore roles and add them to the Selected Roles.

Sitecore - Google Chrome	
sc660rev121015/sitecore/shell/~/xaml/Sitecore.Shell.Applications.Security.Select	Roles.aspx?hdl=CA
Edit User Roles Change the roles that the user is a member of.	
Selected Roles:	
Emailcampaign\Newsletter Message Recipient list Member3	*
Add Remove	~
Available Roles:	
Search:	
Role	
Emailcampaign\Common Opt Out	
Emailcampaign Wewsletter Message Recipient list Member 1	
Emailcampaign Newsletter Message Recipient list Member 10	
Emailcampaign\Newsletter Message Recipient list Member 11	
Emailcampaign\Newsletter Message Recipient list Member 2	
Emailcampaign Newsletter Message Recipient list Member 3	
Emailcampaign\Newsletter Message Recipient list Member4	
Emailcampaign Newsletter Message Recipient list Member 5	
Emailcampaign Newsletter Message Recipient list Member6	
Emailcampaign Wewsletter Message Recipient list Member 7	
Emailcampaign Wewsletter Message Recipient list Member8	
Emailcampaign Wewsletter Message Recipient list Member9	
Emailcampaign Wewsletter Message Recipient list Unsubscribed 1	
Emailcampaign Wewsletter Message Recipient list Unsubscribed2	
Emailcampaign\Newsletter Message Recipient list Unsubscribed3	
I I I Page	e 1 of 4 (48 items)
	Cancel

6. In the Edit User Roles dialog box, click Ok to close the dialog box.

Selected roles are displayed as imported list in the Recipients list tab.

	st Recipients View list Opted Out Build list Opted Out View list	
LIST DETAILS		^
List Name:	Newsletter Message Recipient list	
DEFAULTLIST	· · · · · · · · · · · · · · · · · · ·	^
List Name:	Emailcampaign/Newsletter Message Recipient list Member2	
Emails	0	
MPORTED LIST1		^
List Name:	Emailcampaign\Reporting List Member1	
Emails	100	
		_

Note that you cannot modify the source Sitecore user list with ECM.

Once you have built a recipient list, you can add more Sitecore user lists to it using the **Import List** button.

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For more information about building a recipient list, see Section 4.1, Building a New Recipient List.



2.4 Reviewing a Message

When you prepared a message, you can review it using the following options:

- Send a quick test.
- Preview a message in different email clients.
- Perform a spam check.

For more information about reviewing messages, see Chapter 5, Performing a Message Review.



2.5 Sending a Message

When the message is ready you can send it immediately or schedule the dispatch for a specific time later.

To send a message:

- 1. Select the **Dispatch** tab.
- 2. To send a message immediately, select the Send message now check box, and click Send message.
- 3. To let the involved persons know that sending process is complete, select the Notification check box and enter email addresses separating them by a comma.

For more information about sending a message, see Chapter 6, Sending Messages.



2.6 **Reviewing Reports**

Give recipients some time to react to the message. The more recipients react to the message, the more meaningful and valuable information you can get from the reports. For more information about reports, see the chapter *Email Campaign Reports*.

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Chapter 3

Creating Messages

This chapter describes the main actions that you can perform while working with messages. In this chapter, you can also find information about A/B testing and design importing.

This chapter contains the following sections:

- How to Access the E-Mail Campaign Manager
- How to Create a Message
- How to Find an Existing Message
- How to Edit a Message
- How to Add a Message Version for a Different Language
- How to Perform A/B Testing
- How to Duplicate an Existing Message
- ECM Message Types
- How to Save a Message as a Subscription Message
- How to Subscribe a Visitor using an ECM Action
- How to Send a Message Using an ECM Action
- Importing a Design from a Webpage

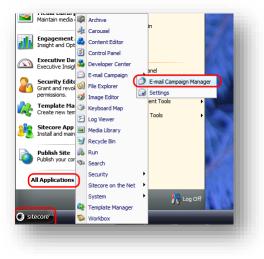


3.1 How to Access the E-Mail Campaign Manager

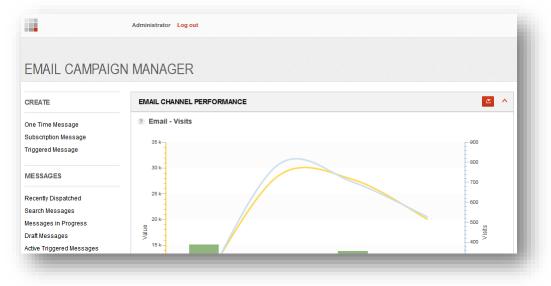
You can access ECM from the Sitecore Desktop and from the Page Editor.

To access ECM from the Sitecore Desktop:

1. Select Sitecore, All Applications, E-mail Campaign, E-mail Campaign Manager.



Sitecore starts the Email Campaign Manager.

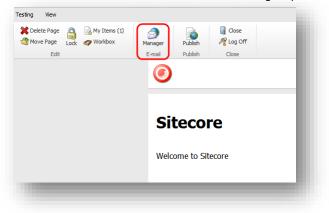


To access ECM from the Page Editor interface:

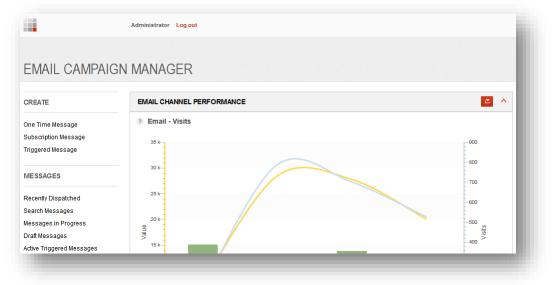
1. Open the Page Editor.



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



Sitecore starts the E-Mail Campaign Manager.





3.2 How to Create a Message

This section describes how to create a new message.

To create a new message:

1. In the **CREATE** section, select a message type. For more information about ECM message types, see *Section 3.8, ECM Message Types*. For example, choose the **One Time Message** type.

REATE	EMAIL CHAN
One Time Message	? Email - Vi
Subscription Message Triggered Message	35 k

ECM displays the dialog box with the available templates.

mport From				Â
CHTML> Use html file	Import Design			
			<html></html>	ш
Newsletter Message	Two-Column Message	One-Column Message	Simple HTML Message	
T T Eleis Tert Magazza				Ţ

 Select a message template. For example, let's choose the Newsletter Message template. To know more about other message creation options, see Section 3.2.1, Message Templates and Import Options.



ECM creates the message and opens it:

ewsletter M	lessage						EN 🛔	ACTIONS 🗳
Back						Save	MESSAGE INFO	b
							Message Type	One Time
ieneral Reci	PIENTS N	IESSAGE	REVIEW	DISPATCH	REPORTS		Status	Drafts
							Dispatch	Not Initiated
GENERAL MESSAG	E INFO					^	Total Recipients	100
Description Campaign Category	/Emails					▼ More ▼		
SENDER DETAILS						^		
From Name	Alex Anders							
From Email	no_reply@sited	core.net						
						More 🗸		

3. Give the message a name to identify it and edit the fields in the **General** tab, if necessary. For more information about the **General** tab, see *Section 3.12, Importing a Design from a Webpage*.

Now you can start to edit your message and configure various options, such as recipient lists and dispatch options.

For more information about editing a message, see Section 3.4.1, How to Edit a Message.



3.2.1 Message Templates and Import Options

In a default installation, ECM contains the following message templates and import options:

nport From				Î
CHTML> Use html file	Import Design			
Ose num me	import Design			
			<html></html>	Ш
Newsletter Message	Two-Column Message	One-Column Message	Simple HTML Message	
T				-

- Use HTML file Import HTML code for the message body from an html file.
- **Import Design** Use the **Design Importer** to import a design for a message from a webpage. For more information about importing a design, see *Section 3.12, Importing a Design from a Webpage*. The **Design Importer** module must be installed on your solution to enable this option.
- **Newsletter Message** A newsletter message template with a header containing a link to the online message version and footer with links to opt-out pages.
- Two-Column Message A message template with a two column layout and footer with links to opt-out pages.
- One-Column Message A message template with a one column layout and footer with links to opt-out pages.
- Simple HTML Message An HTML message without a predefined layout.
- Plain Text Message A plain text message without a predefined layout.
- **Pre-existing Page** This message creation option lets you select a page on your website and use it as a body for your message.

Pages in Sitecore CMS may be complex and security restrictions may apply to certain elements on the page. For example, a page may contain a section called *Special Offers*, which only registered users can see if they open this page on the website.

ECM lets you define how it behaves when it creates an email message from the webpage. There are two options:

- 1) ECM respects the security settings. In this case recipients with different security privileges will receive different looking messages (if the source page has security restrictions).
- ECM ignores the security settings. In this case ECM renders all elements on the page and all recipients receive the same message.

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For information about how to configure this, see the *ECM Administrator's and Developer's Guide*.

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3.3 How to Find an Existing Message

To let you find an existing message, the **ECM** provides a number of search options with different search filters.

To find an existing message, use the links from the **MESSAGES** or the **REPORTS** sections:

VIESSAGES	June 2012 -
Recently Dispatched	Sample Nev
Search Messages	Newsletter I
/lessages in Progress Draft Messages	Sample Nev
Active Triggered Messages	Newsletter I
Scheduled Messages Sent Messages	Newsletter I
Jent messages	
REPORTS	Subscription
Top 10 Best Messages	Dispatch Co
Currently Running A/B Messages	Unsubscrib

Links in these sections trigger the search among all the existing messages with different filters and display the results in a table.

The following sections describe what each link shows.

Recently Dispatched

This link shows all messages that have been dispatched so far under the current manager root. This link does not show **Triggered** messages and messages in the **Draft** state.

CREATE									– ^
One Time Message	NAME	STATUS	DATE IN C♥	SENT TO	OPEN RATE	CLICK RATE	VALUE PE	VALUE PE	VISITS PE
Subscription Message Triggered Message	Message 20	Paused	01/13/13 1		88 %	77 %	51.21	39.83	1.29
	Message 10	Sent	01/13/13 1	95	92 %	77 %	60.44	44.86	1.35
MESSAGES	Message 19	Select Win	01/10/13 2		85 %	64 %	41.23	40.71	1.01
Recently Dispatched Search Messages	Message 9	Sent	01/10/13 2	94	83 %	66 %	41.57	39.08	1.06

The resulting table contains the following columns:

- Name The name of the message.
- Status The current status of the message.
- **Date in Current Status** The date when the message changed its status to the current status.
- Sent to If the dispatch process has finished, this column displays the number of recipients whom this message has been sent. If the dispatch process is still in progress, this column displays the amount of recipients in percent, whom this message has already been sent.
- Click Rate How many recipients who received the message clicked a link in it (in percent).
- Open Rate How many recipients who received the message opened it (in percent).
- Value per Email Sent How much value, on average, a single email generated.



- Value per Visits How much value per visit this message generated.
- Visits per Email Sent How many visits to the website, on average, a single message drove.

Search Messages

This link shows all messages that exist in the current ECM manager root.

CREATE				E ^
One Time Message Subscription Message				٩
Triggered Message	NAME	STATUS	TYPE	DATE IN CURRENT STATUS
MESSAGES	Sample Message	Drafts	One Time Message	01/23/13 13:52
Recently Dispatched	Newsletter Message	Drafts	One Time Message	01/23/13 09:59
Search Messages	Newsletter Message	Drafts	One Time Message	01/23/13 09:46

The resulting table contains the following columns:

- **Name** The name of the message.
- **Status** The current status of the message.
- **Type** The type of a message.
- Date in Current Status The date when the message changed its status to the current status.

Messages in Progress

When you dispatch a message, it is considered to be a message in progress until the dispatch process ends.

This link shows the messages that are currently being sent or are paused.

CREATE				Z ^
One Time Message	NAME	STATUS	DISPATCH DATE	÷
Subscription Message Triggered Message	Message 20	Paused	01/13/13 19:59	
	Message 19	Select Winner	01/11/13 00:47	
MESSAGES	Message 18	Select Winner	01/08/13 05:35	
Recently Dispatched Search Messages	Message 17	Paused	01/05/13 10:23	
Messages in Progress	Message 16	Select Winner	01/02/13 15:11	

The resulting table contains the following columns:

- **Name** The name of the message.
- **Status** The current status of the message.
- Dispatch Date The date when the message was sent.

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Draft Messages

Draft messages are messages that have been created but have not been sent yet.

This link shows the messages that are in the **Draft** state.

NAME	ТҮРЕ	CREATED DATE	✿ MODIFIED DATE
Sample Message	One Time Message	01/23/13 11:58	01/23/13 13:52
Newsletter Message	One Time Message	01/23/13 09:57	01/23/13 09:59
Newsletter Message	One Time Message	01/23/13 09:46	01/23/13 09:46
Newsletter Message	One Time Message	01/23/13 09:46	01/23/13 09:46
Newsletter Message 21T1351	One Time Message	01/21/13 14:23	01/21/13 15:01
	Newsletter Message Newsletter Message Newsletter Message	Newsletter Message One Time Message Newsletter Message One Time Message	Newsletter Message One Time Message 01/23/13 09:57 Newsletter Message One Time Message 01/23/13 09:46 Newsletter Message One Time Message 01/23/13 09:46

The resulting table contains the following columns:

- Name The name of the message.
- **Type** The type of a message.
- Created Date The date when the message was created.
- Modified Date The date when the message was modified.

Active Triggered Messages

When you create triggered messages, you must activate them before ECM can send them. This link outputs the currently active triggered messages.

CREATE						Z ^
One Time Message	NAME	A/B TEST	RECIPIENTS	OPEN RATE	VALUE PER EMAIL	VALUE PER VISIT
Subscription Message Triggered Message	Message 29		100	84 %	39.14	32.39
	Subscription Confi		0	0 %	0.00	0.00
MESSAGES	Message 26		100	91 %	62.12	42.62
Recently Dispatched	Message 22		100	85 %	58.82	45.80
Search Messages Messages in Progress	Message 23		100	89 %	56.84	43.09
Draft Messages Active Triggered Messages	Subscription Notifi		0	0 %	0.00	0.00
Scheduled Messages	Message 28		100	86 %	40.34	35.73

The resulting table contains the following columns:

- **Name** The name of the message.
- **A/B Test** Whether or not an A/B Test is configured for this message.
- **Recipients** how many recipients received this message.
- Open Rate How many recipients who received the message opened it (in percent).
- Value per Email Sent How much value, on average, a single email generated.

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• Value per Visit – How much value per visit this message generated.

3.3.1 How to Sort Messages

To sort messages by values in a specific column, click the title of the column.

For instance, if you want to sort messages by their name, click the title of the **NAME** column. The module sorts messages by their names in the ascending order:

Triggered Message	NAME	♦ STATUS	ТҮРЕ	DATE IN CURRENT STATUS
MESSAGES	Dispatch Completed	Active	Triggered Message	01/18/13 15:11
Recently Dispatched	February Newsletter	Drafts	One Time Message	01/22/13 11:08
Search Messages	Message 1	Sent	One Time Message	12/19/12 14:21
Messages in Progress Draft Messages	Message 10	Sent	Subscription Message	01/13/13 19:09
Active Triggered Messages Scheduled Messages	Message 11	Paused	One Time Message	12/19/12 14:21
Sent Messages	Message 12	Select Winner	Subscription Message	12/22/12 09:33

To switch the sort order from ascending to descending and vice versa, click the column title again.



3.4 How to Edit a Message

This section describes how you can edit the content of your message with ECM.

3.4.1 How to Edit a Message Subject and Body

To edit a subject and body of an existing message:

- 1. Select a message.
- 2. On a message, select the **MESSAGE** tab.

ENERAL	RECIPIENTS	MESSAGE	REVIEW	DISPATCH	REPORTS	
Subject	GE - VARIANT A					
Web Ins	sites June 2012: Resources &	Sitecore Buzz				
Body						
		A		- #	click here to see the online	A
	Sitecore Web Worldwide Resources	o Insites			sitecor	e
		mer			this Issue	e [

- 3. ECM displays the following fields that you can edit:
 - **Subject** the subject of your message.
 - **Body** the rich text field containing the body of your message.

Body is a rich text field. When you select it, Sitecore opens the message in the Page Editor. For more information about editing rich text in the Page Editor, see the *Content Author's Cookbook, Section 3.2, Editing an Item in the Page Editor*.

3.4.2 How to Add Tokens

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 puts it in the email.

How to Add a Token to the Message Body

In the message body, 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. In the **Message** tab, click on the **Body** field to start the **Page Editor**.

NERAL	RECIPIENTS	MESSAGE	REVIEW	DISPATCH	REPORTS		
				Previ	ewed for recipient:	Recipient	• C
IESSAG	E-VARIANT A						Z ^
ubject							
Web Insi	ghts: Resources & Sitecore	Buzz					
ody							
		Are you h	aving trouble viewing	the e-mail? Please	click here to see the c	nline version.	Â
	Sitecore Web	-			siteco		ш
		o Insites mer					ш



ECM opens the message in the Page Editor.

මේ Home	e Advanced Experience	e Testing View		a _
idit Preview -	Component Insert	Page Move Page Lock ØWorkbox		
		Are you having trouble viewing the e-r	mail? Please click here to see the online version.	E
	Sitecore We Worldwide Resources	mer latform sted with web with the ment Platform, profiles,	SILECORE In this Issue Dear Stulname, Music edition of Stecore Web National Stecore	
	immediate action to convert traffic. > View Press Release	t your website	an advice, visitor profiling, multivariate testing and more.	
	immediate action to convert traffic.	t your website	analytics, visitor profiling, multivariate testing and more.	
	immediate action to convert traffic. > View Press Release	t your website	analytics, visitor profiling, multivariate testing and more. Enjoy	

2. Place the cursor in the field in which you want to insert a token. Sitecore displays the context menu. In the menu, click the **Edit the text** button .

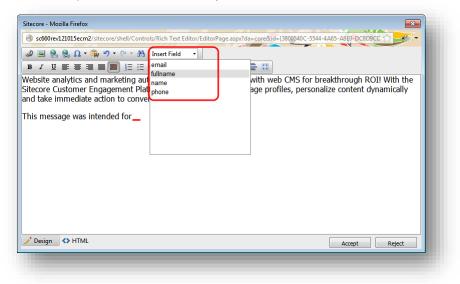




The module opens the rich text editor.

● sc660rev121015ecm2/sitecore/shel//Controls/Rich Text Editor/FditorPage.aspx?da=core&id=[3800540C-5544 4A65-A&E0-DC8D9CC] ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●
B Z U 手 吾 君 目 舅 汪 汪 译 译 de × × × A × ③ · 章 □ Website analytics and marketing automation are now integrated with web CMS for breakthrough ROI! With the Sitecore Customer Engagement Platform, you can develop webpage profiles, personalize content dynamically
B Z U 臣 吾 言 ■ 圖 注 注 译 译 de × × A · A · O · → 章 □ Vebsite analytics and marketing automation are now integrated with web CMS for breakthrough ROII With the Sitecore Customer Engagement Platform, you can develop webpage profiles, personalize content dynamically
itecore Customer Engagement Platform, you can develop webpage profiles, personalize content dynamically
Accept Reject

3. In the editor, place the cursor where you want to insert a token. Click Insert Field:



Select the token from the list of available tokens.

The editor inserts the token at the location of the cursor.



4. At the lower right corner of the editor, click Accept:



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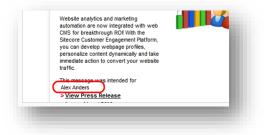


Save the changes and close the editor.

To preview the personalized message for different subscribers, in the **Message** tab, click the **Refresh** button in the **Previewed for recipient** field. You can select a specific recipient using the **Recipient** menu:

1	Prev	iewed for recipient: Rec	ipient 🔻 C
	MESSAGE RECIPIENTS		
Sitecore Buzz	EMAIL	FULL NAME	
Are you ha	Recipient0@ecmtest.ua	Recipient	
Web Insites	Recipient1@ecmtest.ua	Recipient	E
	Recipient10@ecmtest.ua	Recipient	
	Pociniont11@ocmtoct.up	Paciniant	

ECM substitutes the tokens with the appropriate values and displays the message:



How to Add a Token to the Message Subject

To add a token to a message subject:

- 1. Select a message.
- 2. In the **MESSAGE** tab, in the **Subject** field, put the cursor in the place where you want to insert a token.
- 3. In the message ribbon, click the Actions button and select Insert personalization.

Hello ody	Insert personalizatio 🖈	AB TE STING Remove this variant	MESSAGE Quick test	- 1
ouy	Edit body Insert personal	lization token ate this variant See A/B test results		-
		+ Add a new variant	SILCCOIC	E
	Worldwide Resources			



ECM displays the Insert token dialog box:

OKEN NAME	
mail	
uliname	
ame	
hone	

Select a token.

4. ECM inserts the token in the place where the cursor was:



To preview the personalized message for different subscribers, in the **Message** tab, click the **Refresh** button in the **Previewed for recipient** field. You can select a specific recipient using the **Recipient** menu:

Г		iewed for recipient:	Recipient 🔻 C
	MESSAGE RECIPIENTS		^
			<u>^</u>
itecore Buzz	EMAIL	FULL NAME	
Are you ha	Recipient0@ecmtest.ua	Recipient	<u> </u>
Web Insites	Recipient1@ecmtest.ua	Recipient	E
Irces	Recipient10@ecmtest.ua	Recipient	
	Paciniant11@acmtactua	Paciniant	

ECM substitutes the tokens with the appropriate values and displays the message:

Subject		
Hell Harry! F	ead the Latest Sitecore N	lews
Body		
		Are you having trouble vie



3.4.3 How to Set Alternative Text for a Message (Shown in non-HTML E-mail Clients)

Alternative 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 alternative text:

- 1. Select a message.
- 2. In the Message tab, click the More link. The module displays the Alternative Text field:

multivariate testing and more.	
Enjoy	
The Sitecore Team	-
	More V
	_

Enter the alternative text and save the message.

	The Sitecore Team	-
ternative text		
Your e-mail client does not support HTML mails.		
		Less 🔨

3.4.4 How to Add Attachments to a Message

To add attachments to a message:

- 1. Select a message.
- 2. In the message top ribbon, click the **Actions** button dialog box:

ewsletter	Message						is 🗳
Back ENERAL F	RECIPIENTS MESSAGE	REVIEW	DISPATCH	REPORTS	Save	Add Attachment Save as <u>Subscripti</u> Add an attachm Edit Engagement Plan Duplicate message	ent to you
GENERAL MESS	AGE INFO				^	Iotal Recipients	100

- 1. In the Actions dialog box, select Add attachments.
- 2. In the prompt dialog, select a file that you want to attach OK.

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3. The module attaches the file to the message. You see it in the ribbon in the **Message** tab:



To remove an attachment:

1. Click the attachment's title. The module displays the dialog box that contains all items that are attached to this message:

		Ø	X ACTIONS	2
	ACHMENT	ТҮРЕ	SIZE	
🗌 🗌 Lig	hthouse.jpg	image/jpeg	561276	Sitecore
				We
				ources

- 2. Select checkboxes next to attachments that you want to remove.
- 3. Click **Remove attachments**.



3.5 How to Add a Message Version for a Different Language

If your website contains more than one language, you can add a message version for a different language using the ECM interface.

To add a message version in a different language:

- 1. Select a message.
- 2. On the message ribbon, click the **Message Language** button (IN). This button indicates the currently selected language, which also stands for the current default message language:

	ter Messag	0				MESSAGE LANG			ACTIONS 🗳
Back						UK Ukrainian (INFO	
	\					 EN English 		e	One Time
GENERAL	RECIPIENTS	MESSAGE	REVIEW	DISPATCH	REPORTS				Drafts
	/						Dispatch		Not Initiated
GENERAL M	ESSAGE INFO					^	Total Recipi	ents	0
Name	Newslette	r Message							

3. When you click the **Message Language** button, ECM displays the **Message Language** dialog box. The dialog box contains all languages configured in the current website. If there is a version of the message in a particular language, a tick mark is displayed next to that language in the list. For instance, at the following screenshot we see that a language version of the message in English is present and the version in Ukrainian is not added:



4. Click the new language, and ECM creates a new version of the message in that language. ECM displays the following warning:

llecore	e Newslette	r					ик 🛃	ACTIONS 🗳
< Back						Save	MESSAGE INFO	b
							Message Type	One Time
						×		
🗙 Varian	nt A has not been trans	lated to "Ukrainian	(Ukraine)". <u>Add a</u>	new language versi	ion		Status	Drafts
🗙 Varian	nt A has not been trans	alated to "Ukrainian	(Ukraine)". <u>Add a</u>	<u>new language versi</u>			Status Dispatch	Drafts Not Initiated

If the version already exists, ECM just opens it.



Click **Add a new language version**. ECM reports an issue which tells you that the message was not translated to the new language:

	UK 🛔	ACTIONS 🗷
Save	MESSAGE INFO)
	Message Type	One Time
More details∨	Status	Drafts
	Dispatch	Not Initiated
	Total Recipients	100
J		
		Save MESSAGE INFO More details ✓ Dispatch

5. Now you have the version in a different language selected. The **Message, Review** and the **Reports** tabs now display information related to the message version in the newly selected language.



3.6 How to Perform A/B Testing

The Sitecore ECM lets you dynamically test the content of your message to find out which components or combination of components are the most effective.

You can create message variants to see which variations of text and images work best with site visitors. This can be particularly useful as a part of your strategy when setting goals and optimizing campaigns.

3.6.1 A/B Testing Workflow

A typical A/B Testing workflow contains the following steps:

- 1. Create message variants.
- 2. Dispatch selected variants to a limited set of recipients.
- 3. Select the A/B Test winner.
- 4. Dispatch the winner variant to the rest of recipients.

The following sections describe each step in detail.

3.6.2 How to Create Message Variants

ECM lets you create message variants and perform A/B Testing to determine the message variant that works best for your needs.

To create a new message variant:

- 1. Select a message.
- 2. In the **Message** tab, click the **Actions** button **C**. ECM displays the **Actions** dialog box:

Subject	MESSAGE CONTENT	AB TE STING	MESSAGE	
Web I Body	Insert personalization	 Remove this variant Duplicate this variant See A/B test results Add a new variant 	Quick test	E
	Worldwide Resources		Sitteene	
	Introducing the	×	In this Issue	

3. In the AB Testing section, select Add a new variant.

You can also duplicate an existing variant by selecting **Duplicate this variant** in the **AB Testing section**.



4. The module adds a new message variant. You can see it if you scroll the page down:

	automation are now integrated with web CMS for breakthrough ROI With the Sitecore Customer Engagement Platform, you can develop webgage profiles, personalize content dynamically and take immediate action to convert your website traffic. > <u>View Press Release</u> > <u>Learn About DMS</u>	Instess we proudly introduce the Stecore Customer Engagement Platform, it provides advanced online marketing capabilities such as campaign management, web analytics, visitor profiling, multivariate testing and more. Enjoy The Sitecore Team	Ŧ
			More 🗸
Subject Sitecore	BE - VARIANT B		
Body	Are you having trouble viewi	ing the e-mail? <u>Please click here to see the online version.</u>	*
	Sitecore Web Insites Worldwide Resources		E

Now you can edit the new message variant. You can perform email preview and spam check actions on specific message variants.

3.6.3 How to Dispatch Message Variants to a Limited Set of Recipients

ECM lets you dispatch selected message variants to a limited set of recipients. You do that to determine which variant works best for your goals and select the winner variant, which you will send to the rest of the recipients.

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To dispatch selected message variants to a limited set of recipients:

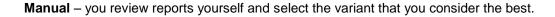
1. Select a message that has multiple variants:

B Variants								
lect the A/B variants :	and test size to test.							
В								
e of the test:	10%							
elivery								
	w or schedule message d	elivery						
Send message no	-							
Schedule messag	e delivery							
Date/Time	4/25/2013		8:00 PM					
Timezone:	(UTC+02:00) Helsir	nki, Kyiv, Riga, S	Sofia, Tallinn, Vi	ilnius			*	
elect A/B winn	er							
tomatically or manua	lly select A/B winner							
A set a set of a	Manual							
Automatic								
	mariuar							
	Maliual							
tomatically select wir		u rs 💌 us	sing 🖲 Best Va	alue per vi	sit			
tomatically select wir		urs 💌 us	sing 🖲 Best Va 🔘 Highes					
		urs 💌 us						
tomatically select wir		urs 🔍 us						
otification			Highes					
otification	iner after: 12 Hou		Highes					
otification Notify these email a	iner after: 12 Hou	e delivery is con	Highes					
otification Notify these email a	aner after: 12 Hou	e delivery is con	Highes					
Notify these email a	addresses when message	e delivery is con	Highes					
otification Notify these email a	andresses when message email use comma as sepa dispatch	e delivery is con	Highes					
otification Notify these email a For more than one ulti-language of Use preferred lang Selecting the use p	aner after: 12 Hou addresses when message email use comma as sepe dispatch uage referred language option w	e delivery is con arator.	Highes mplete. emessage in the	e preferrei	e d language of	each recipient	. Recipients	
otification Notify these email a For more than one ulti-language of Use preferred lang Selecting the use p without a preferred	andresses when message email use comma as sepe dispatch uage referred language option w language will receive the r	e delivery is con arator.	Highes mplete. emessage in the	e preferrei	e d language of	each recipient	Recipients	
otification Notify these email a For more than one ulti-language of Use preferred lang Selecting the use p without a preferred	aner after: 12 Hou addresses when message email use comma as sepe dispatch uage referred language option w	e delivery is con arator.	Highes mplete. emessage in the	e preferrei	e d language of	each recipient.	Recipients	
otification Notify these email a For more than one ulti-language of Use preferred lang Selecting the use p without a preferred	andresses when message email use comma as sepe dispatch uage referred language option w language will receive the r	e delivery is con arator.	Highes mplete. emessage in the	e preferrei	e d language of	each recipient	. Recipients	
Diffication Notify these email a For more than one Ulti-language (Use preferred lang Selecting the use p without a preferred The default language	andresses when message email use comma as sepe dispatch uage referred language option w language will receive the r	e delivery is con arator.	Highes mplete. emessage in the	e preferrei	e d language of	each recipient	Recipients	
Notification Notify these email is For more than one ulti-language of Use preferred lang Selecting the use po- vitinout a preferred The default language ending Mode Emulation Mode	andresses when message email use comma as sepe dispatch uage referred language option w language will receive the r	e delivery is con arator. will dispatch the message in the	Highes mplete. message in the currently select	e preferret ted langue	e d language of age as default.	each recipient	. Recipients	
Notification Notify these email is For more than one ulti-language of Use preferred lang Selecting the use po- vitiout a preferred The default language ending Mode Emulation Mode	anner after: 12 Hou addresses when message email use comma as sepe dispatch uage refered language option v language awill receive the r je is: Ukrainian (Ukraine).	e delivery is con arator. will dispatch the message in the	Highes mplete. message in the currently select	e preferret ted langue	e d language of age as default.	each recipient	Recipients	
Notification Notify these email is For more than one ulti-language of Use preferred lang Selecting the use po- vitiout a preferred The default language ending Mode Emulation Mode	anner after: 12 Hou addresses when message email use comma as sepe dispatch uage refered language option v language awill receive the r je is: Ukrainian (Ukraine).	e delivery is con arator. will dispatch the message in the	Highes mplete. message in the currently select	e preferret ted langue	e d language of age as default.	each recipient	. Recipients	
Notification Notify these email is For more than one ulti-language of Use preferred lang Selecting the use po- vitiout a preferred The default language ending Mode Emulation Mode	anner after: 12 Hou addresses when message email use comma as sepe dispatch uage refered language option v language awill receive the r je is: Ukrainian (Ukraine).	e delivery is con arator. will dispatch the message in the	Highes mplete. message in the currently select	e preferret ted langue	e d language of age as default.		. Recipients	st

- 2. In the **Dispatch** tab, in the **A/B Variants** field, select the variants that you want to include in the dispatch.
- 3. In the **Size of the test** field, enter the percentage of recipients that you want to use in the test. The recipients for this subset are chosen randomly.
- 4. In the **Delivery** section, select one of the two options send the message now or schedule the message delivery for a later time.
- 5. In the Select A/B winner section, select one of the following options:

Automatic – ECM will select the winning variant basing on a criterion that you select; for instance, will select the message variant with the best value per visit in a specified number of hours:

Automatic	Manual						
utomatically sele	ct winner after:	12	Hours	•	using	0	Best Value per visit
						0	Highest open rate



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- 6. In the **Notification** section, if you select the **Notification** checkbox, ECM will send a message to email addresses that you specify in the text box informing that the dispatch process has finished.
- 7. In the **Multi-language dispatch** section, select whether you want to use a preferred language option for recipients or not.
- 8. Click Start A/B Test.

If you did not select **Use preferred language** in the **Multi-language dispatch** section, ECM displays the following dialog box:

Message dispatch confirmation	×
Would you like to send the message now? The message will be sent to all recipients in recipient list in EN.	the
Yes	No

If you selected **Use preferred language** in the **Multi-language dispatch** section, ECM displays the following dialog box:

Nessage dispatch confirmation	
Would you like to send the message now? The message will be sent to all recipients in the recipient list. As you have selected the multi-language option, each recipient will receive the message in their preferred language. Recipients with no preferred language will receive the message in EM	l.
Yes	No

The dialog box mentions that recipients with no preferred language will receive the message in the currently selected language.

Click Yes.

The module starts the A/B Test and changes the status of the message to *Sending*. The title of the **Start A/B** Test button changes to **Pause**.

When the module finishes sending the message to the limited set of recipients, the button's title changes to **Resume**, but the button remains inactive until the winner variant is selected.

When the winner variant is selected, click **Resume** to dispatch the selected variant to the rest of the recipients.

More Dispatch Options

On the **Dispatch Options** tab, there is also the **Sending Mode** checkbox.

For more information about the Sending Mode checkbox, see Chapter 6, Sending Messages.

3.6.4 How to Select an A/B Test Winner

The module lets you select the A/B Test winner automatically or manually.

If you choose to select the winner automatically, ECM will do that basing on a certain criterion; for instance, will select the message variant with the best value per visit in a specified number of hours.



If you choose to select the winner manually, you review reports yourself and select the variant that you consider the best.

Automatically selecting the A/B Test winner

To select the A/B Test winner automatically:

1. In the Select A/B Winner section, select the Automatic tab.

Automatic	Manual		
utomatically sele	ct winner after:	12 Hours using @ Best Value	e per visit
		C Highest op	

2. In the **Automatically select winner after:** field, enter the number of hours after which the module should select the winner variant using the criterion that you choose.

Manually selecting the A/B Test winner

To select the A/B Test winner manually:

1. In the Select A/B Winner section, select the Manual tab.

Select A/B win utomatically or man Automatic	ner ually select A/B winner Manual			l
AB VARIANT	OPENED	CLICK RATE	VALUE	

2. 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 analytics report in this section and select the variant that you consider the best.

3.6.5 A/B Testing and Triggered Messages

You can perform A/B testing with triggered messages.

If you create multiple versions of a triggered message and activate the message, the **ECM** module will send the message variants using the round-robin algorithm until a winner variant is selected. When a winner variant is selected, the module will continue sending only that variant.

For example, consider that there is a form and when users subscribe with that form, ECM sends them a confirmation letter that is a triggered message. If that triggered message has variants *A*, *B* and *C*, then recipients will receive variants in the following order:

- First recipient Variant A.
- Second recipient Variant B.
- Third recipient Variant C.
- Fourth recipient Variant A.
- And so on.



3.7 How to Duplicate an Existing Message

You can duplicate messages that you created previously.

To duplicate an existing message:

- 1. Select a message that you want to duplicate.
- 2. In the message top ribbon, click the **Actions** button dialog box:

Back						Save	Add Attachment Save as a Quick	
ENERAL REC	IPIENTS	MESSAGE	REVIEW	DISPATCH	REPORTS	(Edit Engagemen	
GENERAL MESSAG	BE INFO					^	Sent Progress	
lame	Sitecore Insight	ts: Introducing the	Sitecore Analytic	s			Dispatch Date	3 Dec 2012
escription							Dispatch Time	12:05
ampaign Category	/Emails	•					Total Recipients	25
anguage	English : Engl	ish 🔻					A/B Test	In Progress
						More 🗸		

- 3. In the Actions dialog box, select Duplicate message.
- 4. In the prompt dialog, enter the name of the new message and click **OK**. The module duplicates the message and opens it.



3.8 ECM Message Types

This section describes the differences between the three message types that are available in ECM. ECM contains three message types:

- One Time Message
- Subscription Message
- Triggered Message

3.8.1 One Time Message

One Time Messages are messages which are intended to be dispatched once for a specific purpose to a recipient list selected specifically for the message. For example, this could be a special campaign email dispatched for recipients living in Germany enticing them to buy a newly introduced product.

3.8.2 Subscription Message

Subscription messages are messages which are intended to be dispatched regularly to a specific recipient list. For example, they could be subscription newsletters or recurring discount offers.

A Subscription message's template contains a predefined recipient list. This lets you skip the **Recipients** step in the *Email Campaign Flow* when you use subscription messages.

You can modify the recipient list for a specific subscription message before dispatching if you want. This will not affect other subscription messages that are based on the same template.

You can save messages as subscription messages using the **Save as Subscription Message** action.

3.8.3 Triggered Message

Triggered messages are messages that are sent to a single person at a time, when triggered by a specific event or in a specific flow. For example, this could be sending a message to user when they register for a website, or to a user who visited the website once but has not returned for three weeks.

Unlike subscription messages and One Time messages, triggered messages do not have a fixed or defined number of recipients, since the module knows the recipient only when an events or a condition is triggered by that recipient.



3.9 How to Save a Message as a Subscription Message

To save a message as a subscription message:

1. Select a message.

The message that you select must already have a recipient list associated with it.

2. In the main ribbon, click **Actions**.

Sitecore Ne	wsletter					Save	UK Actions Add Attachment Save as a Subscript
GENERAL	ECIPIENTS	MESSAGE	REVIEW	DISPATCH	REPORTS		🛃 Edit Engagement Plan ★
				Preview	ved for recipient:	Recipient 🔹 C	Iotal Recipients 100
MESSAGE - VARI	ANTA						

3. In the Actions dialog box, click Save as a Subscription Message Template.

The module opens the Save as Subscription Message Template dialog box.

	nessage as a Subscription Message template - all future ant using the following information:
Name	News Subscription
Template	One-Column Message
Recipient List	Reporting List
	Save Cancel

4. In the dialog box, enter the name of the new subscription message template and click **Save**.

Now you have the new subscription message template and you can use it to create subscription messages.

Note

The **Save as a Subscription Template** operation changes the type of the original message, it does not copy the message. If you want to keep the original message intact, you may want to duplicate it before saving it as a subscription message.



3.10 How to Subscribe a Visitor using an ECM Action

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.

The **Edit Email Audience** action subscribes a visitor to (or unsubscribe a visitor from) one or more recipient lists.

To set the Edit Email Audience action:

- 1. Select a message.
- 2. In the top ribbon, click the Edit Engagement Plan button 4.

	Save	MESSAGE INFO)
		Message Type	One Time
REPORTS		Status	Drafts
		Dispatch	Not Initiated
recipient: Rec	ipient 🔻 C	Total Recipients	100

Sitecore opens the message engagement plan.

File Editing		Rev .		
Standard	Sitecore Insights: Introducing the Siteco	e Analytics		
> Is Email Address Validated	Delivery Initialized	Inactive Recipie	nts	
> Is Email Link Clicked	Recipient Queued	Send not Complete Message Un	nopened Message Opened	-
> Is Email Opened	The server has not started sending a		s sent the message to These messages have	been opened
Is Password Validated	message to mese recipients.	to these recipients.		
Time Spent in Automation State				
			\diamond	
	Send Failed A	tive Recipients		
	Invalid Address	Clicked Through Message		
	The server received a failure message for these recipients.	These recipients have clicked on at least one link in this message.		
	Soft Rounco	Ť	Productivo Vinitoro	
	Soft Bounce Temporarily unable to deliver message to recipient.	Valueble visit	Productive Visitors These people received cicked on a link, and pr	the message,

3. Click the square box that is located on a line between states:



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The Actions dialog box appears:



4. Click Add and a dialog box appears.



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

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

dd 📦 Edit 💥 Delete	These people received the m × luce
S	
dit Email Audience	



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

sc660rev121015ecm2/sitecore/she	ell/default.aspx?xmlcontrol=EmailCampaign.Ch
Change Recipient List Sub Select the recipients lists that the opted out of.	bscriptions e visitor should be subscribed to those that the visitor should be
cipient Lists:	Subscribe To:
 E-mail Campaign E-mail Campaign 	0
	Opt-out Of:
Send confirmation mail	OK Cancel
	UK Cancer

7. In the **Change Recipient List Subscriptions** dialog box, you can change recipient lists to which the visitor is subscribed.

To subscribe a website visitor to a recipient list:

- a. In the Recipient Lists field, select a recipient list.
- b. Click right arrow icon next to **Subscribe To** field. Selected recipient list is displayed in the **Subscribe To** field.

To unsubscribe a website visitor from a target audience:

- a. In the Recipient Lists field, select a recipient list.
- b. Click right arrow icon next to **Opt-out Of** field. The selected recipient list is displayed in the **Opt-out Of** field.
- 8. Click Ok to close the Change Recipient Lists Subscriptions dialog box.
- 9. In the engagement plan designer dialog box, click Save.



3.11 How to Send a Message Using an ECM Action

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.

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

To set the Send Email Campaign Message action:

- 1. Select a message.
- 2. In the top ribbon, click the Edit Engagement Plan button 4.

		Save	MESSAGE INFO	
			Message Type	One Time
REPORTS			Status	Drafts
			Dispatch	Not Initiated
for recipient:	Recipient 💌	С	Total Recipients	100

Sitecore opens the message engagement plan.

Home View			
Save Export File Editing			
Standard	Sitecore Insights: Introducing the Sitecore Analytics		
Is Email Address Validated	Delivery Initialized	Inactive Recipients	
Is Email Link Clicked	Recipient Queued Send not C	omplete Message Unopened	Message Opened
🔷 ls Email Opened	The server has not started sending a The server is	in the process of The server has sent the message	to These messages have been opened
Is Password Validated	message to these recipients. generating an to these recip	d sending a message these recipients.	in a mail client by the recipient.
Time Spent in Automation State			
			<u> </u>
	Send Failed Active Recipier	ts	
	Invalid Address Clicked Thr	ough Message	
	The server received a failure These recipie	nts have clicked on at in this message.	
	message for mese recipients.	n mis message.	
		¥	
	Soft Bounce Temporarily unable to deliver		Productive Visitors
		vable visit Yes 0	These people received the message, clicked on a link, and produced value on the site.

3. Click the square box that is located on a line between states:





The Actions dialog box appears:



4. Click Add and a dialog box appears.

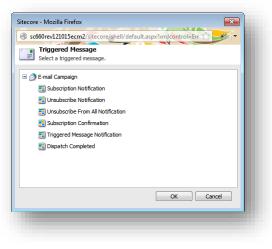


This dialog box lists all of the actions that are available.

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



- 6. In the Actions dialog box, click Edit to configure the action.
- 7. In the **Triggered Message** dialog box, select a message that you want to send using this action.





- 8. Click **Ok** to close the **Message** dialog box.
- 9. In the engagement plan designer dialog box, click **Save.**

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3.12 Importing a Design from a Webpage

If you have the **Design Importer** module installed, ECM lets you import a design for a message from a webpage.

Note

If you installed the Design Importer module after installing ECM 2.1 and if you plan to use the Design Importer with ECM, then you must install the Design Importer Update package that you find on the ECM 2.1 Downloads page.

This option is available for messages of the type **One Time Message**.

To import a design for a message from a webpage:

1. In ECM, create a new message by selecting One Time Message in the CREATE section:

CREATE	EMAIL CHAN
One Time Message	? Email - Vi
Subscription Message	35 k
Triggered Message	
	30 k

2. In the **Message** dialog box, select **Import Design**.

Message			×
Import From			
<html></html>			
Use html file	Import Design		Ш
		<html></html>	

ECM opens the **Design Importer** in a new window.

3. In the **Design Importer**, in the **File** group, click **Open**.





The **Design Importer** opens the Open dialog box:



4. In the **Open** dialog box, in the **URL** field, type in the URL of the web page that you want to import. Click **OK** and the Design Importer opens the web page.

Design Importer - Mozilla Firefox
🕐 ecm2.demo.devdemo1dk1.dk.sitecore.net/sitecore modules/Shell/DesignImporter/DesignImporter.aspx?saveOptions=hide&tmo=popup&tcp={087D87A8-EF23-4CD7-9D83-14D77DCB52D4 🏠 🔫
Import Import<
+Dig Søgning Billeder Maps Play Gmail Drev Kalender Oversæt Blogger Mere -
Google-søgning Jeg prøver lykken
Google.dk på: Føroyskt

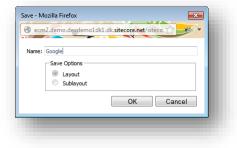
Now you can import the page as it is or edit its elements and import it afterwards. For information about editing page elements in the Design Importer, see the <u>Design Importer User</u> <u>Guide</u>, *Chapter 2, Editing and Importing a Web Page*.

5. When you are done with editing the page elements, click Import.





The **Design Importer** opens the **Save** dialog box.



6. In the **Save** dialog box, enter the name for the design template that you import and click **OK**. The Design Importer displays a dialog box with the import progress for a few moments and if the import is successful, you see the following message:



Click OK.

7. To return to the **Message** dialog, close the Design Importer window.



After importing the new template, you see it in the **Newly Imported Templates** section in the One Time Message dialog box:

essage		×
Newly imported Template	5	
Import From		
<html></html>		
Use html file	Import Design	

Click the newly imported template to create a new message with it.

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Next time when you create a message, the design template that you imported previously appears in the **Import From** section.

nport From				
CHTML> Use html file	Import Design			
Newsletter Message	Two-Column Message	One-Column Message	CHTML> Simple HTML Message	н
Plain Text Message	Pre-existing Page	Gogle		



Chapter 4

Managing Recipients

A recipient is an individual with an associated e-mail address that receives messages. ECM stores recipients in recipient lists. This section describes how to import, manage and export recipient lists.

This chapter contains the following sections:

- Building a New Recipient List
- Viewing a Recipient List
- Building an Opted Out List
- Viewing an Opted Out List
- Exporting a Recipient List to a File



4.1 Building a New Recipient List

To build a recipient list, you can use the following options:

- 1. Import a Sitecore recipient list.
- 2. Import recipients from a file.
- 3. Select an existing recipient list.

When you import a Sitecore recipient list or import a recipient list from a file, the module automatically creates a default list. The default list contains all the users who subscribe to the message. If you are using an existing list, the default one is not displayed but it is already in there.

4.1.1 Importing a Sitecore Recipient List

To create a new recipient list containing Sitecore users:

- 1. Create a new message and click the **Recipients** tab.
- 2. In the Recipients tab, in the Recipient Build list tab, click Build new recipient list.

/						
Recipients Build list	Recipients View list	Unsubscriber	s Build list	Unsubscribe	rs View list	
	Bu	<u>iild new list or s</u> elect a	an existing one			
	Build new re	ecipient list or	Use exist	ing list 🔻		
				5		

3. Click Import List.

List Name:	Emailcampaign\Newsletter Message Recipient list Member11	
Emails	0	
	Add new list source Import List	

4. In the Import List dropdown list, click Import Sitecore List.



5. In the Edit User Roles dialog box, select Sitecore roles and add them to the Selected Roles.

Sitecore - Google Chrome	
sc660rev121015/sitecore/shell/~/xaml/Sitecore.Shell.Applications.Security.SelectR	oles.aspx?hdl=CA
Edit User Roles	
Change the roles that the user is a member of.	
Selected Roles:	
Emailcampaign\Newsletter Message Recipient list Member3	*
	-
Add Remove	
Henove	
Available Roles:	
Search:	
Role	
Emailcampaign \Common Opt Out	
Emailcampaign\Newsletter Message Recipient list Member 1	
Emailcampaign\Newsletter Message Recipient list Member 10	
Emailcampaign Newsletter Message Recipient list Member 11	
Emailcampaign Wewsletter Message Recipient list Member 2	
Emailcampaign Newsletter Message Recipient list Member 3	
Emailcampaign\Wewsletter Message Recipient list Member4	
Emailcampaign Wewsletter Message Recipient list Member 5 Emailcampaign Wewsletter Message Recipient list Member 6	
Emailcampaign Wewsletter Message Recipient list Member 6 Emailcampaign Wewsletter Message Recipient list Member 7	
Emailcampaign Wewsletter Message Recipient list Member 8	
Emailcampaign/Newsletter Message Recipient list Member9	
Emailcampaign/Newsletter Message Recipient list Unsubscribed1	
Emailcampaign Wewsletter Message Recipient list Unsubscribed2	
Emailcampaign Newsletter Message Recipient list Unsubscribed3	
	1 of 4 (48 items)
II I Page	2.01.1(10.100110)
II I Page	Cancel

6. In the Edit User Roles dialog box, click Ok to close the dialog box.

Selected roles are displayed as imported list on the Recipients list tab.

When you import a Sitecore recipient list you can add both Sitecore recipient lists and recipient lists from a file.

4.1.2 Importing a Recipient List From a File

To import a recipient list from a file:

- 1. Create a new message and click the **Recipients** tab.
- 2. In the Recipients tab, in the Recipient Build list tab, click Build new recipient list.

ecipients Build list	Recipients View list	Unsubscribers Build list	Unsubscribers View list	
	Build	<u>t new list or s</u> elect an existing one	1	
	Build new rec	the second se	an Bat -	
	Build new rec	pient list or Use exist	ing list 🔻	



3. Click Import List.

emanoampaigi	n\Newsletter Message Recipient list Member11 0
List Name:	Emailcampaign/Newsletter Message Recipient list Member11
Emails	0
	Add new list source
	IMPORTLIST
	import recipients from a file import Silecore List
	Import Sitecore List

- 4. In the **Import List** dropdown list, click **Import recipient list from a file**.
- 5. In the **Import Recipients** wizard, in the **File to Import** dialog box, select *.csv file from your local disk and click **Next**.

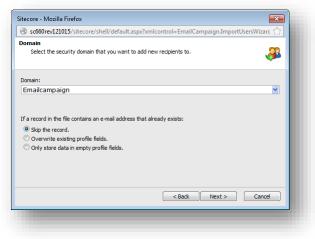
File to Import Select the CSV file that contains the recipient in be in .csv format.	formation that you want to import. Th	nis file must 🔉
File Name:		
Users_2012-09-04T004326.csv		Browse
	< Back Next >	Cancel

6. In the **Fields** dialog box, manage the fields that you want to export from a file and the fields to which imported data is added.

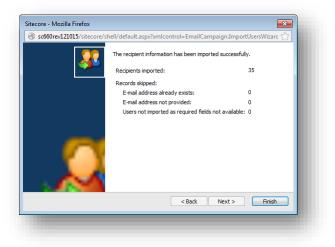
From:		To:		
Email	~	Email	*	Ж –
Fullname	~	Fullname	~	Ж –
Name	~	Name	~	Ж –
Phone	~	Phone	~	8
<select add="" field="" to=""></select>	~	<select property=""></select>	~	
		< Back Next >	Cano	el



7. In the **Domain** dialog box, in the **Domain** field, select the domain that you want new users to add to.



- 8. In the **Domain** dialog box, select the option what the module should do if the imported file contains an existing email.
- 9. Review the import statistics and click **Finish**.



When you imported a recipient list from a file you can add both Sitecore recipient lists and recipient lists from a file.

4.1.3 Selecting an Existing List

To use an existing list:

1. Create a message and click the **Recipients** tab.



2. In the Recipients tab, click Use existing list.

Recipients Build list	Recipients View list Unsubscribers Build list Unsubscribers View list
	Build new list or select an existing one
	Build new recipient list or Use existing list 🔻
	٩
	NAME
	Newsletter Message Recipient list 1
	Newsletter Message Recipient list 2
	Newsletter Message Recipient list 3

3. In the drop down list, select the list that you want to use.

The selected list is displayed in the List details section.

When you selected an existing list, you can add both Sitecore lists and recipient lists from a file. In this case the module creates a new extended list instead of overwriting an existing one.

4.1.4 Removing a Recipient List

You can remove both main recipient list and lists that compose the main one. If you remove the main recipient list then all the imported, nested and the default list are removed.

To remove a recipient list:

1. In the **Recipients Build list** tab, click the **C** Actions button.

Recipients Build	d list Recipients View	list Unsubscribers	Build list	Unsubscribers View list	
LIST DETAILS					()^
List Name: Emails	Newsletter Message R 142	ecipient list		GENERAL	*
		Add new list sou			

2. In the General pop-up window, click Remove list.



4.2 Viewing a Recipient List

When you built a recipient list, you can view it on the Recipients view list tab, in the Message recipients table. This table contains the users who receive a message. If you later create a list of users who must not receive a message, the Message recipients table will not contain them.

To find a specific recipient, use the Search box:

Recipients Build lis	t Recip	ients View list	Opted C	ut Build list	Opted (Out View list	
MESSAGE RECIP	ENTS						^
							Q
MAIL				FULL NAME			
drose81@drs.com				Derek Rose			
smcln@sm.com				Steve McLa	ren		



4.3 Building an Opted Out List

You can build a list of users who must not receive a message. This list is called an Opt Out list. The Opt Out list contains the default list, in which all the users who click Unsubscribe in a message will be added.

To build an Opted Out list, you can use the following options:

- 1. Import a Sitecore list.
- 2. Import an Opted Out list from a file.

4.3.1 Importing a Sitecore List

To import a Sitecore list:

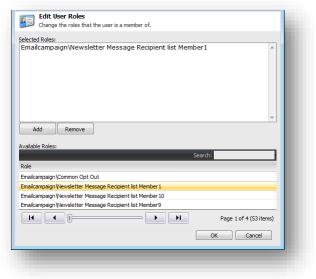
1. In the Recipients tab, in the Opted Out list tab, click Import list.

Recipients Buil	d list Recipients View lis	st Opted Out Build list	Opted Out View list	
DEFAULT LIST				^
List Name:	Emailcampaign\Newslet	ter Message Recipient list Unsul	bscribed10	
Emails	0			
	IMPORT LI:	n opt-out list from a file		

2. In the Import list pop-up window, click Import Sitecore List.



3. In the Edit User Roles dialog box, select Sitecore roles and add them to the Selected Roles.



4. In the **Edit User Roles** dialog box, click **Ok** to close the dialog box.

Selected roles are displayed as imported lists In the Opted Out list tab.

4.3.2 Importing an Opted Out List From a File

To import an Opted Out list from a file:

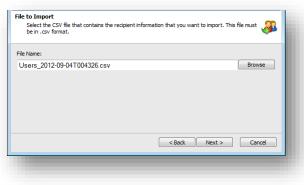
1. In the **Opted Out Build list** section, click **Import List**.

Recipients Build	list Rec	cipients View list	Opted Out Build list	Opted	Out View list	
				-,		
DEFAULTLIST						^
List Name:	Emailcam	paign\Newsletter Me	ssage Recipient list Uns	ubscribed10		
Emails	0					
			Add new list source			
			Import List 🔻			
		IMPORTLIST				
		Import an opt-o	out list from a file			
		Import Sitecore	e List			

2. In the Import List dropdown list, click Import an opted out list from a file.



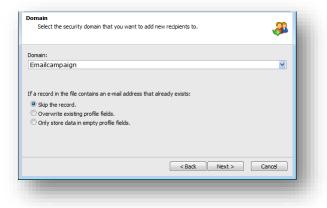
3. In the File to import dialog box, select *.csv file from your local disk and click Next.



4. In the **Fields** dialog box, manage the fields that you want to export from a file and the fields to which imported data is added.

From:		To:	
Email	~	Email	🖌 🔀
Fullname	~	Fullname	✓ ※
Name	~	Name	✓ ¥
Phone	~	Phone	✓ ¥
<select add="" field="" to=""></select>	~	<select property=""></select>	~
		< Back Next >	Cancel

5. In the **Domain** dialog box, in the **Domain** field, select the domain that you want new users to add to.



- 6. In the **Domain** dialog box, select the option what the module should do if the imported file contains an existing email.
- 7. Review the import statistics and click Finish.



4.3.3 Removing an Opted Out List

To remove an Opted Out list:

1. In the **Opted Out Build list** tab, click the **C** Actions button.

Recipients Build	l list Recipients View lis	st Opted Out Build list	Opted Out View list	
DEFAULTLIST				^
List Name:	Emailcampaign\Newslet	ter Message Recipient list Unsubs	cribed10	
Emails	0			
MPORTED LIS	T1		(☑ ^
List Name:	Emailcampaign\Newslet	ter Message Recipient list Member		
Emails	35		Remove list	
		Add new list source		
		Import List 💌		

2. In the General pop-up window, click Remove list.



4.4 Viewing an Opted Out List

When you built an Opted Out list, you can view it on the Opted Out view list tab, in the Optedout table. This table contains the users who will not receive a message.

Recipients Build list	Recipients View list	Opted (Out Build list	Opted Out View list	
OPTEDOUT					^
EMAIL			FULL NAME		
drose81@drs.com			Derek Rose		Â
smcln@sm.com			Steve McLar	en	

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4.5 Exporting a Recipient List to a File

You can export a recipient list to a *.csv file.

To export a recipient list:

- 1. Open the ECM application.
- 2. In the **Most Recent Dispatched Messages** section, click the **Control** Actions button.



- 3. In the General pop-up window, click Export to a CSV file.
- 4. In the **Recipient Information** dialog box, select the fields that you want to export to a file. Click **Next**.

cipient Information:			
🚖 Fullname	9	🚖 Email	
Phone Phone	3	🚖 Name	
		< Back Next >	Cancel

5. In the **Recipient List** dialog box, select the lists that you want to export to a file. To export security roles as well as selected lists, select the **Advanced options** check box and select



the roles. Click Next.

2 Newsletter Message Recipient list 2	lecipient Lists:		Selected:
✓ Advanced Options Security Roles:	🎎 Newsletter Message Recipient list		Newsletter Message Recipient list
Security Roles:	🎕 Newsletter Message Recipient list 2	G	
	Security Roles:	pient list M	ember1 Select

6. Download the CSV file and click **Finish**.

22	The recipient information has been exported successfully. Recipients exported: 52
070	Download the CSV file
	☑ Delete the temporary CSV file after it has been successfully downloaded
	< Back Next > Finish



Chapter 5

Performing a Message Review

When you prepared a message, you can send it to one or several recipients to see that your configuration settings are correct and the message successfully sent and received. You can also preview a message in different email clients and see how it will be treated by different spam filters.

This chapter contains the following sections:

- Performing a Message Quick Test
- How to Preview a Message in Different Email Clients
- How to Perform a Spam Check



5.1 Performing a Message Quick Test

Use the quick test to send a message to one or more recipients quickly.

To perform a quick test:

- 1. In the **Review** tab, select the **Send Quick Test** tab.
- 2. Enter one or more email addresses separating them by a comma.

GENERAL	RECIPIENTS	MESSAGE	REVIEW	DISPATCH	REPORTS	
Send Quick	Test Email Prev	view Spam C	Check			
jackw@siteco	re.net, dred1432@site	core.net				Send

3. Click Send.

Note

Sending a quick test message does not initiate the creation of an Analytics Campaign item. Therefore, external links in the dispatched e-mail are wrapped with zero GUID parameters, for example:

The test links only work when a member of the ECM Users or ECM Advanced Users roles or an administrator is logged in to the Sitecore Client interface. Otherwise, a wrapped external link returns the 404 Page Not Found error to avoid spoofing.



5.2 How to Preview a Message in Different Email Clients

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 message looks in different clients:

- 1. In the **Review** tab, select the **Email Preview** tab.
- 2. Click **Settings** button *****, and select email clients in which you want to preview the email.

Send Quick Test Er	mail Preview Spam Check		
Run Email Preview chec	k	Repo	orts 🔻 🗮 🛪 🗸
ENTS			
hoose preview clients			
AOL Mail (Explorer)	AOL Mail (Firefox)	AOL Mail (Chrome)	
Apple Mail 4	Apple Mail 5	BlackBerry 4 OS	E
BlackBerry 5 OS	Android 2.3	Gmail (Explorer)	
Gmail (Firefox)	Gmail (Chrome)	Hotmail (Chrome)	
Hotmail (Explorer)	Outlook.com (Explorer)	Outlook.com (Firefox)	
]Outlook.com (Chrome)	Hotmail (Firefox)	iPhone 3GS	
iPhone 4S	III iPhone 5	🕅 iPad	-

3. Click Run Email Preview Check.

Send Quick Test	Email Preview Spa	m Check		
Run Email Preview ch	eck		Reports •	**
MAIL PREVIEW FOR	VARIANT			^
December 2012 17:47:49)			
EAST.	0-p	Real Concession Procession	🖳 🚮 🌜 500 mi	
	And Annual State of S		Alexander But 12/0/00/2	
5000 0000 0000 0000 0000 0000 0000			Te: brellink 240 FM (68): Nessage Subject Wee)	
En. Constantin			Service and	
	5		Poli a truct bert	

4. Click an image to see it in full size.



5.3 How to Perform a Spam Check

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 a spam check:

- 1. In the Review tab, select the Spam Check tab.
- 2. Click **Settings** button *****, and select the spam clients to test.

Send Quick Test	Email Preview Spam Check	
Run Spam Check		Reports 🔻
TIONS		
hoose spam clients		
MessageLabs	Postini	✓ Barracuda
SpamAssassin	Outlook	C Gmail
Yahoo! Mail	AOL Mail	Sender Policy Framework
DKIM	DomainKeys	Sender ID
GMX	Mail.com	
		Select All

3. Click Run Spam Check.

Send Quick Test Em	ail Preview Spam Check	
Run Spam Check		Reports 🔻 🗱 🔻
SPAM CHECK FOR VARIA	NT A	^
4 December 2012 12:29:07		
assed with comments		
f Barracuda	Cutlook	
The font's colour is ve contrast of the text to any spam filters.Your	th comments with a score of 0.69. ry similar to that of the background. Avoid hiding words in yo make it visible. Your email contains HTML content. This won't nuttipart message is mostly HTML. Be sure to include a full p e contains content in both HTML and plain text	usually cause you to fail

Spam filters can return different types of results:

• Failed

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Your message will probably not pass this spam filter. You can 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.

• Passed with comments

Your message will probably pass this spam filter, 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. Spam filter providers may occasionally change their score thresholds.

Passed

Your message will pass this filter.

• Processing

Your message is being tested against this spam filter.

• Error

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

5.3.1 How to view older reports

You can view older reports that the module generated previously.

To view older reports:

- 1. In the **Review** tab, select the **Spam Check** tab.
- 2. Click Reports.

Send Quick Test	Email Preview	Spam Check				
Run Spam Check			1	Repo	rts 🔻	* •
			REPORTS		^	
PAM CHECK FOR	VARIANT		DATE AND TIME	SPAM FILTERS		^
December 2012 11	:46:51		5 December 2012 11:	Outlook		
issed with com	nents		5 December 2012 11:	2		
🕈 Outlook						
You've used th	ed with comments wi e phrase "Dear (sor ving the word "Dear"	nething)" within yo				hould

3. In the Reports pop-up window, select a report.

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Chapter 6

Sending Messages

When you prepared a message or a subscription message you can send it to the recipients. Triggered messages are sent automatically to one recipient at a time when a specific event occurs.

This chapter describes how to send a one time message or a subscription message and how to activate a triggered message.

This chapter contains the following section:

- Sending Messages
- Multi-Language Message Dispatch



6.1 Sending Messages

When the message is ready you can send it immediately or schedule the dispatch for a specific time later.

6.1.1 Sending a Message or a Subscription Message

To send a one time message or a subscription message:

- 1. Create a new message or select an existing one.
- 2. In the **Recipients** tab, add message recipients.

For more information about how to add recipients, see the chapter Managing Recipients.

- 3. Select the **Dispatch** tab.
- 4. To send a message immediately, select the **Send message now** check box.

elivery		
	w or schedule message delive	ary.
Send message no		
Schedule messag	ge delivery	
Date/Time	4/25/2013	8:30 PM
Timezone:	(UTC+02:00) Helsinki, H	Kyiv, Riga, Sofia, Tallinn, Vilnius
otification		
	addresses when message del	livery is complete.
	addresses when message del	livery is complete.
	addresses when message del email use comma as separato	
Notify these email	email use comma as separato	
Notify these email For more than one	email use comma as separato dispatch	
Notify these email For more than one ulti-language Use preferred lang	email use comma as separato dispatch juage	м.
Notify these email For more than one ulti-language Use preferred lang Selecting the use p without a preferred	email use comma as separato dispatch juage preferred language option will d language will receive the mess	
Notify these email For more than one ulti-language Use preferred lang Selecting the use p without a preferred	email use comma as separato dispatch juage referred language option will d	r. lispatch the message in the preferred language of each recipient. Recipients sage in the currently selected language as default.
Notify these email For more than one ulti-language Use preferred lang Selecting the use p without a preferred	email use comma as separato dispatch juage preferred language option will d language will receive the mess	r. ispatch the message in the preferred language of each recipient. Recipients
Notify these email For more than one Ilti-language Use preferred lang Selecting the use p without a preferred	email use comma as separato dispatch juage preferred language option will d language will receive the mess	r. lispatch the message in the preferred language of each recipient. Recipients sage in the currently selected language as default.

- 5. To send a message at a specific time:
 - 1) Select the Schedule message delivery check box.

Delivery	
end this message now or schedule message delivery.	
Send message now	
Schedule message delivery	
Date/Time 12/6/2012 12:00 PM	
Timezone: (UTC-06:00) Central Time (US & Canada)	-

- 2) In the **Date/Time** field, set the time when you want the message to be sent.
- 3) In the Timezone field, select your time zone.

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- 6. To let the involved persons know that sending process is complete, select the **Notification** check box and enter email addresses separating them by a comma.
- 7. In the **Multi-language dispatch** section, select whether you want to use a preferred language option for recipients or not. For more information about the **Multi-language dispatch** option, see section *Multi-Language Message Dispatch*.
- 8. Click Send to send a message or Schedule to finish delivery scheduling.
- 9. When you click **Send**, ECM displays the following dialog box:

Message dispatch confirmation	×
Would you like to send the message now? The message will be sent to all recipients in th recipient list in EN.	ie
Yes	No

Click **Yes** and the module sends the messages.

6.1.2 Sending a Triggered Message

Triggered messages are messages that are sent to a single person at a time, when triggered by a specific event or in a specific flow. You must activate a triggered message to allow the ECM application send it when the configured condition is fulfilled.

To activate a triggered message:

- 1. Create a new or select an existing triggered message.
- 2. Select the **Dispatch** tab.
- 3. To activate a message immediately, select the **Activate message now** check box.

		age for activation at a later time.
 Activate message no Activate message at 		
From date/time:	12/6/2012	12:00 PM
To date/time:		
Timezone:	(UTC+02:00) Helsin	nki, Kyiv, Riga, Sofia, Tallinn, Vilnius
Notification		
Notify these email add	dresses when message	e delivery is complete.
Notify these email add	dresses when message nail use comma as sepa	

4. To activate a message for a specific time period:

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1) Select the Activate message at scheduled time check box.

ctivate this message now or schedule the message for activation at a later time. Activate message now Activate message at scheduled time From date/time: 12/6/2012 12:00 PM	
From date/time: 12/6/2012 12:00 PM	
To date/time:	
Timezone: (UTC-06:00) Central Time (US & Canada)	-
Notification	
For more than one email use comma as separator.	More 🗸

- 2) In the **From date/time** field, set the start of the period when you want the ECM to send a message.
- 3) In the **To date/time** field, set the date until which ECM sends a message. If this field is blank, the message will always be active.
- 4) In the **Timezone** field, select your time zone.
- 5. To let the involved persons know that sending process is complete, select the **Notification** check box and enter email addresses separating them by a comma.
- 6. Click Activate message or Schedule to activate the triggered message.



6.2 Multi-Language Message Dispatch

The Email Campaign Manager lets you create message versions in multiple languages. Starting from version 2.1, it also lets you deliver messages to recipients in their preferred language.

6.2.1 Sending a Message in a Recipient's Preferred Language

If your message has versions in multiple languages and the recipients in the recipient list have different default content languages set, then you can send your message in a recipient's preferred language.

To send a message in a recipient's preferred language:

- 1. Select a message.
- 2. On the **Dispatch** tab, in the **Multi-Language Dispatch** section, select **Use preferred language**.

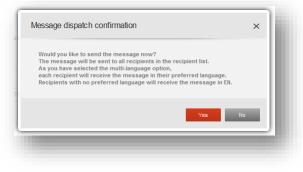
Back						Save		
							Message Type	One Time
NERAL	RECIPIENTS	MESSAGE	REVIEW	DISPATCH	REPORTS		Status	Drafts
							Dispatch	Not Initiated
ISPATCH O	PTIONS					/	Total Recipients	100
© Schedule Date/Tin Timezon		ry /25/2013 UTC+02:00) Helsinki, K	8:30 Pl			T		
Notificatio		es when message deli	very is complete.					
		se comma as separator						
Use prefer Selecting t without a p		l language option will di ge will receive the mess				ient. Recipients		

The **Message Language** button (IN) indicates the currently selected language, which also stands for the current default message language.

3. To send a message immediately, select the **Send message now** check box and click **Send message**.



4. When you click Send message, ECM displays the following dialog box:



The dialog box mentions that recipients with no preferred language will receive the message in the currently selected language.

5. Click **Yes** and the message is sent to each recipient in the recipient's preferred language.



Chapter 7

Email Campaign Reports

This chapter describes the E-mail Campaign Manager analytics reporting capabilities which enable marketers to create and manage optimal email marketing campaigns and make better business decisions.

The message reports in **ECM** can be divided into three types:

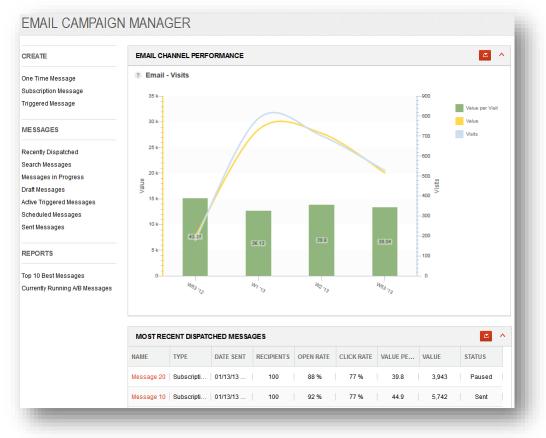
- Reports on the Overall Status of the Email Channel
- Reports on Individual Message Performance
- Marketing Automation Monitor

The following sections describe each report type.



7.1 Reports on the Overall Status of the Email Channel

When you open the Email Campaign Manager, you see several sections that show the overall status of the Email Campaign channel.



The **ECM** main page contains the following charts and tables.

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7.1.1 Executive Insight Dashboard Chart

This chart shows how effective the most recent messages that you sent are in driving value and visits to your website.



This chart contains the report for the Email Traffic Type for the past four weeks from the current date and contains the following values:

- Value per Visit These bars show an average value per visit for weeks for the whole Email Campaign channel.
- **Value** This curve shows the value that all messages sent through this Email Campaign channel generated.
- **Visits** This curve shows the visits that all messages sent through this Email Campaign channel drove to your website.

By looking at this chart you can see if any general adjustments are needed to your messages or landing pages.



7.1.2 Most Recent Dispatched Messages

In the **Most Recent Dispatched Messages** section you see a quick overview of the most recently sent messages. This lets you understand quickly the overall performance of these messages.

REPORTS								- 100		
op 10 Best Messages	0							0		
Currently Running A/B Messages		W53'12		W1 .13	W2 '73		W53'73			
	MOSTREC	ENT DISPATO	HED MESSA	GES					E /	、
	NAME	TYPE	DATE SENT	RECIPIENTS	OPEN RATE	CLICK RATE	VALUE PE	VALUE	STATUS	
	Message 20	Subscripti	01/13/13	100	88 %	77 %	39.8	3,943	Paused	
	Message 10	Subscripti	01/13/13	100	92 %	77 %	44.9	5,742	Sent	
	Message 19	One Time	01/11/13 0	100	85 %	64 %	40.7	3,216	Select Win	
	Message 9	One Time	01/11/13 0	100	83 %	66 %	39.1	3,908	Sent	
	Message 18	Subscripti	01/08/13	100	85 %	65 %	34.1	2,588	Select Win	
	Message 8	Subscripti	01/08/13	100	89 %	70 %	35.6	3,636	Sent	

7.1.3 Top 10 Best Messages

In the Top 10 Performing Messages section you see the top performing messages.

One Time Message	NAME	VALUE 🗘	VALUE PER VISIT	VISITS PER EMAIL	VALUE PER EMAIL
Subscription Message Triggered Message	Message 26	흤 5839	42.62	<mark>,</mark> 1.46	뵺 62.12
	Message 10	5742	44.86	1.35	60.44
MESSAGES	Message 22	5588	<u>,</u> 45.80	1.28	58.82
Recently Dispatched Search Messages	Message 23	5343	43.09	1.32	56.84
Messages in Progress	Message 21	4961	37.30	1.39	51.68
Draft Messages Active Triggered Messages	Message 30	4594	39.60	1.22	48.36
Scheduled Messages	Message 24	4583	38.51	1.25	48.24
Sent Messages	Message 1	4558	41.82	1.15	47.98
REPORTS	Message 12	4490	43.59	1.32	57.56
Top 10 Best Messages	Message 3	4349	41.03	1.13	46.27

You can sort the messages by column values, which include:

- Value.
- Value per Visit.
- Visits per Email.
- Value per Email.



If you select a message, ECM displays the **Message Funnel** which shows the overall recipients' behavior.

es					Message funn	61		
TOP 10 PERFOR	RMING MESSAGES			2		Total Re	cipients 100	
NAME	VALUE 🗘	VALUE PER VISIT	VISITS PER EMAIL	VALUE PER EMAIL			cipients 96	
Message 24	흤 5740	鴂 45.92	1.30	59.		Opened 86		
Message 29	5668	41.37	흤 1.47	흤 60.		Clicked 72		
Message 22	5551	45.50	1.27	57.		Browsed 61 Productive 53		
Message 25	4495	38.09	1.24	47.				
Message 28	4465	38.16	1.23	47.	Value:	5,740	Value per Email:	59.8
Message 9	4424	37.18	1.27	47.	Value per Visit:	45.9	Visits per Email:	1.3
Message 10	4337	39.43	1.16	45.				

To open the message or copy it to drafts, click the **Actions** button and select the required option from the menu:



7.1.4 Currently Running A/B Messages

With this report, you can evaluate how your ongoing A/B test messages perform.

CREATE	CURRENTLY RUN	NING A/B MESSA	GES			2	^
One Time Message	NAME	CURRE	NTLY WINNING	VALUE	S	ENT	÷
Subscription Message Triggered Message	Message 30		В		1,677	01/13/13 19:00	
	Message 19		С		1,131	01/10/13 23:47	
MESSAGES	Message 18		В		911	01/08/13 04:35	
Recently Dispatched Search Messages	Message 27		A		1,232	01/05/13 09:24	
Messages in Progress	Message 16		С		1,257	01/02/13 14:11	
Draft Messages Active Triggered Messages	Message 15		В		1,377	12/30/12 18:59	
Scheduled Messages	Message 24		А		1,694	12/27/12 23:48	
Sent Messages	Message 13		А		1,305	12/25/12 04:35	
REPORTS	Message 12		А		1,606	12/22/12 09:23	
Top 10 Best Messages	Message 21		C		鴂 1,865	12/19/12 14:12	

By default, the messages are sorted by the date and time when they were sent in the descending order.

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If you select a message, ECM displays the A/B Test Result dialog box.

CURRENTLY RUN	NING A/B MESSA	GES			2	A/B TEST RESU	LT				^
NAME	CURRI	ENTLY WINNING	VALUE		SENT	VARIANT	VA	ILUE	OPI	EN RATE	
Message 30		В		1,376	12/05/12 14:04	А		1,814		👷 91 %	
Message 19		A		1,325	12/02/12 18:52	В		👷 2,114		88 %	
Message 18		В		1,242	11/29/12 23:40	С		1,812		91 %	
Message 27		A		1,652	11/27/12 04:28						
Message 16		A		1,131	11/24/12 09:16						
Message 15		В		1,148	11/21/12 14:04						
Message 24		В		👷 2,114	11/18/12 18:52						
Message 13		А		1,163	11/15/12 23:40						

In this dialog box, you can see how specific variant perform.

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7.2 Reports on Individual Message Performance

This section describes how to view the reports which show how individual messages perform.

7.2.1 Message Info and Overview Sections

When you open a sent message, you see the **Message Info** and the **Overview** sections on the right side of the message page.

Back								MESSAGE INFO	D C
								Message Type	Subscription
SENERAL	RECIPIENT	S MESSA	ge 🔿	REVIEW	DISPATCH	REPORTS		Status	Sent
								Dispatch Date	12 Apr 2013
RECIPIENT	S BEHAVIOR							Dispatch Time	22:39
								Total Recipients	100
				Total F	Recipients 100			OVERVIEW	
				Actual R	ecipients 96			Total Recipients	100
				Opened 8	7			Actual Recipients	96
								Opened	87
		_		Clicked 66				Click Through	66
				Browsed 51				Browsed	51
				Productive 41				Productive reci	41
								Value per Visit	37.0
								Value	3,963
		Value:	3,963		Value per Email:	41.3			
		Value per Visit:	37.0		Visits per Email:	111 %			
							Open behavior moni		

These sections let you see a quick overview of how the message performed with the least effort possible while viewing the message.

The **Overview** section always shows the total recipients behavior of all languages regardless of the selected language. You can compare the selected language with the overall performance of the



message.

lessage 10								ACTIONS 🗳
< Back						Save	MESSAGE INFO	2
							Message Type	Subscription
GENERAL RECIPIEN	TS MESSA	GE	REVIEW	DISPATCH	REPORTS		Status	Sent
							Dispatch Date	12 Apr 2013
RECIPIENTS BEHAVIO	R					^	Dispatch Time	22:39
							Total Recipients	100
			Total	Recipients 50			OVERVIEW	
			Actual I	Recipients 48			Total Recipients	100
			Opened				Actual Recipients	96
							Opened	87
			Clicked 34				Click Through	66
			Browsed 27				Browsed	51
			Productive 21				Productive reci	41
							Value per Visit	37.0
							Value	3,963
	Value:	2,089		Value per Email:	43.5			
	Value per Visit:	38.0		Visits per Email:	115 %			
						Open behavior monitor		

7.2.2 The Reports Tab

When you open a message that has been dispatched, ECM opens it with the **REPORTS** tab active:

Back					MESSAGE INFO	
					Message Type	Subscription
ENERAL RECIPIENTS MESSAGE	REVIEW	DISPATCH	REPORTS		Status	Sent
					Dispatch Date	12 Apr 2013
RECIPIENTS BEHAVIOR				^	Dispatch Time	22:39
					Total Recipients	100
	Total	Recipients 100			OVERVIEW	
	Actual	Recipients 96			Total Recipients	100
	Opened				Actual Recipients	96
					Opened	87
	Clicked 66				Click Through	66
	Browsed 51				Browsed	51
	Productive 41				Productive reci	41
					Value per Visit	37.0
					Value	3,963
Value: 3,963		Value per Email:	41.3			
Value per Visit: 37.0		Visits per Email:	111 %			
				Open behavior monitor		
MESSAGE PERFORMANCE						
MESSAGE PERFORMANCE						

This tab contains the following sections.

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Recipients Behavior

This section contains the recipients funnel which shows you how many recipients are in different states. The funnel lets you identify potential problem areas quickly and evaluate how effective the message is in generating value.

		Total Recipients 100		
		Actual Recipients 94		
	0)pened 84		
	Cli	cked 64		
	Brow	/sed 54		
	Produc	tive 46		
Value:	4,171	Value per Email:	44.4	
Value per Visit:	37.9	Visits per Email:	1.2	
				Open behavior monitor

The funnel shows the following values:

- Total Recipients The total number of recipients.
- Actual Recipients The number of recipients who received the message.
- **Opened** The number of recipients who opened the message.
- Clicked The number of recipients who clicked links in the message.
- **Browsed** The number of recipients who viewed more than one page after coming to the website via the link in the message.
- **Productive** The number of recipients who generated value after visiting the website.

If you subtract the **Browsed** value from **Clicked** value, you will get the number of visitors, who came to the website via the link in the message, and went away without viewing any other pages. Such visitors are called page bounced visitors and their number lets you evaluate how effective and relevant your landing pages are.

The section under the funnel contains the following values:

- Value The total value that this message generated.
- Value per Email The average value per email that this message generated.
- Value per Visit The average value per visit that this message generated.
- Visits per Email The average number of visits per email that this message generated.

Open Behavior Monitor

You can get a better overview of the recipients' behavior if you open the **Engagement Plan Monitor**. You can do this by clicking the **Open behavior monitor** link:

Visits per Email:	1.0	
		Open behavior monitor



For more information about the **Engagement Plan Monitor** and the data that it shows, see *Section 7.3, Marketing Automation Monitor*.

Message Performance

This chart shows how effective the message is in driving value and visits to the website.



This chart contains the data for seven days following the day when the message was dispatched.

- Value per Visit These bars show an average value per visit for each day.
- Value This curve shows the value that this message generated.
- Visits This curve shows the visits that this message drove to your website.

Best Email Landing Pages

This section shows the performance of the landing pages that the message leads to. Form this report you can see the best performing landing pages, which enables you to improve your communication with the recipients.

ERFORMANCE INDICATOR	LANDING PAGE	
lost Relevant Experience	/PageG.aspx	
Most Valuable	/PageE.aspx	
Most Attention	/PageE.aspx	
Most Visited	/PageE.aspx	
Most Potential	/PageB.aspx	

This report contains the following indicators:

- Most Relevant Experience The landing page that generated most value per visit.
- Most Valuable The landing page that generated the most value.



- Most Attention The landing page that has generated most visits with value.
- Most Visited The landing page that was visited the most times.
- **Most Potential** The landing page that has the highest potential. For information about how the potential is calculated, see *Section Potential Value*.

If you select an indicator, ECM displays the report that shows why the related page is the best considering the indicator. For instance, if you select the **Most Relevant Experience** indicator, you see the following report:

			LANDING PAGES VALUE	PER VISIT	^
PERFORMANCE INDICATOR	LANDING PAGE				
lost Relevant Experience	/PageG.aspx		LANDING PAGE	VAUE PER VISIT	÷
lost Valuable	/PageE.aspx		/PageG.aspx	👷 59.35	
lost Attention	/PageE.aspx		/PageC.aspx	53.67	
			/PageF.aspx	44.46	
Most Visited	/PageE.aspx		/PageD.aspx	44.40	
Most Potential	/PageB.aspx		/PageD.aspx	44.40	
			/PageE.aspx	44.19	
			/PageB.aspx	43.06	
EMAIL LANDING PAGES PERFORMANCE		^	/PageA.aspx	42.63	

Best Landing Pages Performance

This report shows an overview of all the landing pages, and how they performed in terms of the following indicators:

- Potential.
- Page Bounce.
- Value.
- Value per Visit.
- Clicks.

This report lets you evaluate the performance of the landing pages considering different indicators and do appropriate marketing actions to improve your communication with the recipients.

LANDING PAGE	POTENTIAL	PAGE BOUNCE	VALUE 🗘	VALUE PER VISIT	CLICKS
PageE.aspx	1.0 %	4.00	🙁 1,414.00	44.19	鴂 32.00
/PageG.aspx	-5.4 %	흤 2.00	1,365.00	흤 59.35	23.00
/PageB.aspx	<u> ,</u> 1.5 %	5.00	1,335.00	43.06	31.00
/PageD.aspx	0.8 %	6.00	1,332.00	44.40	30.00
/PageF.aspx	0.7 %	2.00	1,156.00	44.46	26.00
/PageC.aspx	-2.8 %	4.00	1,127.00	53.67	21.00



Potential Value

A message in **ECM** has a characteristic called **potential**. For instance, you can see it in the **Email** Landing Pages Performance report:

LANDING PAGE	POTENTIAL	PAGE BOUNCE	VALUE 🗘	VALUE PER VISIT	CLICKS	
/PageE.aspx	1.0 %	4.00	🙁 1,414.00	44.19	鴂 32.00	^
/PageG.aspx	-5.4 %	흤 2.00	1,365.00	흤 59.35	23.00	
/PageB.aspx	🙁 1.5 %	5.00	1,335.00	43.06	31.00	
/PageD.aspx	0.8 %	6.00	1,332.00	44.40	30.00	
/PageF.aspx	0.7 %	2.00	1,156.00	44.46	26.00	
/PageC.aspx	-2.8 %	4.00	1,127.00	53.67	21.00	

The potential is calculated using the following expressions:

Potential Value gain = (Average Value per Visit – Value per Visit) x Number of related Visits.

```
Potential = Potential value gain * 100 / Sum (Value for all Visits).
```

Opted Out Details

This report shows the list of recipients who opted out from the recipient list.

-	user75@xxxx Recipient 12/10/12 09:16 user75@xxxx Recipient 12/10/12 09:16	EMAIL	FULL NAME	UNSUBSCRIBED DATE
user75@xxux Recipient 12/10/12 09:16	user75@xxux Recipient 12/10/12 09:16	user73@xxx.xx	Recipient	12/10/12 09:16
		user72@xxx.xx	Recipient	12/10/12 09:16
user74@xxxxx Recipient 12/10/12 09/16	user74@xxx.xx Recipient 12/10/12 09:16	user75@xxx.xx	Recipient	12/10/12 09:16
		user74@xxx.xx	Recipient	12/10/12 09:16

You can export the list of opted out recipients to a CSV file. To do that, click the **Actions** button and select **Export to a CSV file**:



You can open CSV files with Excel.



Email Bounces Details

This report shows the list of recipients, whose email addresses returned errors during the dispatch process.

FULL NAME	EMAIL	BOUNCE TYPE	BOUNCE DATE
Recipient	user80@xxx.xx	Soft Bounce	12/10/12 09:16
Recipient	user8@xxx.xx	Soft Bounce	12/10/12 09:16
Recipient	user79@xxx.xx	Soft Bounce	12/10/12 09:16
Recipient	user78@xxx.xx	Hard Bounce	12/10/12 09:16
Recipient	user77@xxx.xx	Hard Bounce	12/10/12 09:16
Recipient	user76@xxx.xx	Hard Bounce	12/10/12 09:16

When ECM cannot deliver a message to a recipient due to an error on the recipient's side, such message is called a bounced message. For more information about bounced messages and the bounce types, see the *ECM Administrator's and Developer's Guide*.

Message Performance per Language

If the message was dispatched using the **Use preferred language** option, this report shows how message versions in different languages performed.

LANGUAGE	RECIPIENTS	OPEN RATE	CLICK RATE	VALUE	VALUE PER VISIT
Ukrainian (Ukraine)	50	92 %	67 %	1,874	36.0
English	50	90 %	71 %	2,089	38.0

7.2.3 Viewing Reports for Message Versions in Different Languages

After a message is sent to a list of recipients with different preferred languages, you can view and analyze reports for message versions in specific languages.

To view reports for message versions in specific languages:

- 1. Select a recently dispatched message.
- 2. Select the **Reports** tab.
- 3. On the message ribbon, click the Message Language button:

lessag	e 10					ALI	L 📇 ACTIONS 🗷
						MESSAGE LANGUAGE	
Back						All Languages	INFO
						 UK Ukrainian (Ukraine) 	e Subscription
ENERAL	RECIPIENTS	MESSAGE	REVIEW	DISPATCH	REPORTS	 EN English 	Sent
						Disputon	12 Apr 2013

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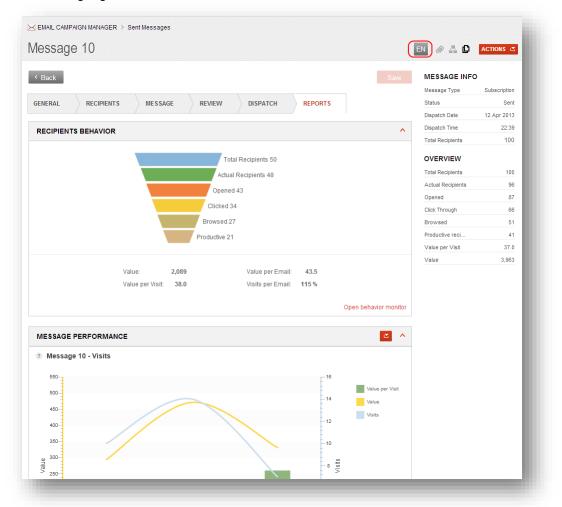


ECM displays the language versions that are available in the message. You can filter reports using language versions that were sent previously.

4. In the Message Language dialog box, select the preferred language:



Now the reports in the **Reports** tab display information related to the message version in the selected language.





7.3 Marketing Automation Monitor

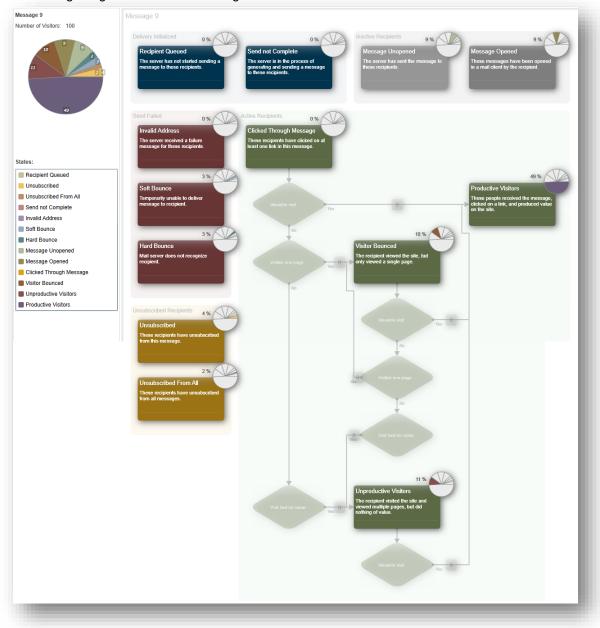
The **ECM** uses the Marketing Automation Monitor to manage the sending process and track the behavior of the recipients of the message.

To access the Marketing Automation Monitor:

- 1. Select a sent message.
- 2. On the Reports tab, in the Recipients Behavior section, click Open Behavior Monitor.

ECIPIENTS BEHAVIOR						^
			Total Recipients 100			
		Ac	tual Recipients 94			
		Ope	ned 79			
		Clicke	d 70			
		Interest	ed 60			
		Productive	9 49			
١	/alue:	4,424	Value per Email:	47.1		
N	/alue per Visit:	37.2	Visits per Email:	1.3		
					Open behav	





The following image shows the Marketing Automation Monitor:

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

7.3.1 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, but the server has not started sending the message to these recipients yet. When you click **Send Messages**, the module puts the recipients from the recipient list in this state. 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*.

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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.



It includes the following states:

• Recipient Queued

This group contains recipients that are queued for dispatch, but the server has not started sending the message to these recipients yet. When you click **Send Messages**, the module puts the recipients from the recipient list in this state. 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.

Send not Complete

When ECM generates a message for a recipient, it puts that recipient in the *Send not Complete* state. When 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

ECM handles the transitions between states in this group automatically; modifying states in this group may affect core functionality.



Send Failed

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

Invalid Address	
The server receive message for these	
	3%
Soft Bounce	
Temporarity unabl message to recipi	
	3%
Hard Bounce	
Mail server does r recipient.	not recognize

It includes the following states:

• Invalid Address

When 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 and Developer's Guide*.

• 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 and Developer's Guide*.

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 and Developer's Guide.

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.



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

If the visitor opens the message, the module puts that visitor in the Message Opened state.

Message Opened

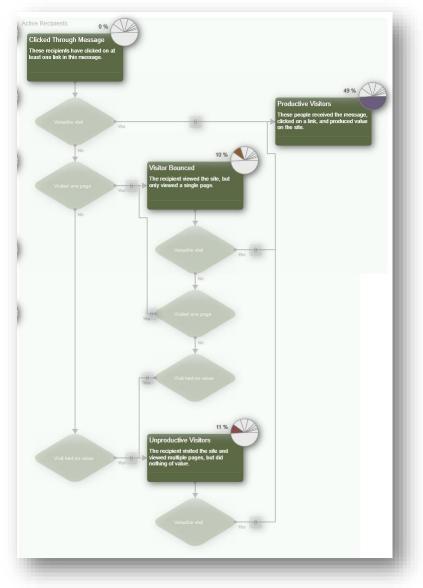
The module puts recipients who opened the message but did not click links in it in this state.

If the visitor clicks a link in the message, the module puts that visitor in the **Clicked Through Message** state. Otherwise, the visitor remains in the **Message Opened** state.



Active Recipients

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



Here is the description of the states in this group.

Clicked Through Message

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

When a browser session of a visitor in this state ends, **ECM** 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, ECM 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, ECM 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.



Opted Out Recipients

This group contains recipients who opted out from the recipient list.



The Opted Out Recipients group contains two states: Opted Out and Opted Out from All.

Opted Out

This state contains recipients who opted out from the recipient list related to this message.

Opted Out from All

This state contains recipients who opted out from all recipient lists on your website.

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