



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 [ECM Administrator's and Developer's Guide](#).

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

- 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.
- Utilize e-mail subscriber lists from CRM and other enterprise applications.
- 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:

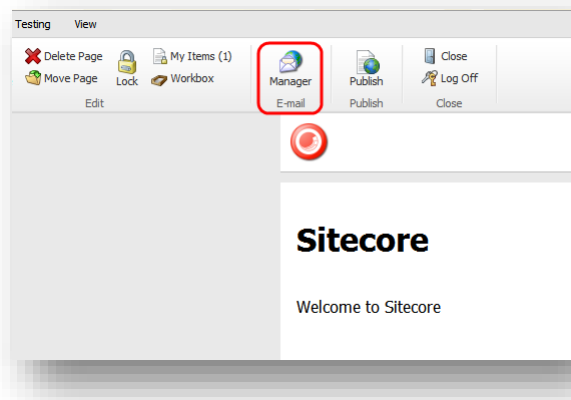
- Accessing the Email Campaign Manager
- Creating a Message
- Building a Recipient List
- Reviewing a Message
- Sending a Message
- Reviewing Reports

2.1 Accessing the Email Campaign Manager

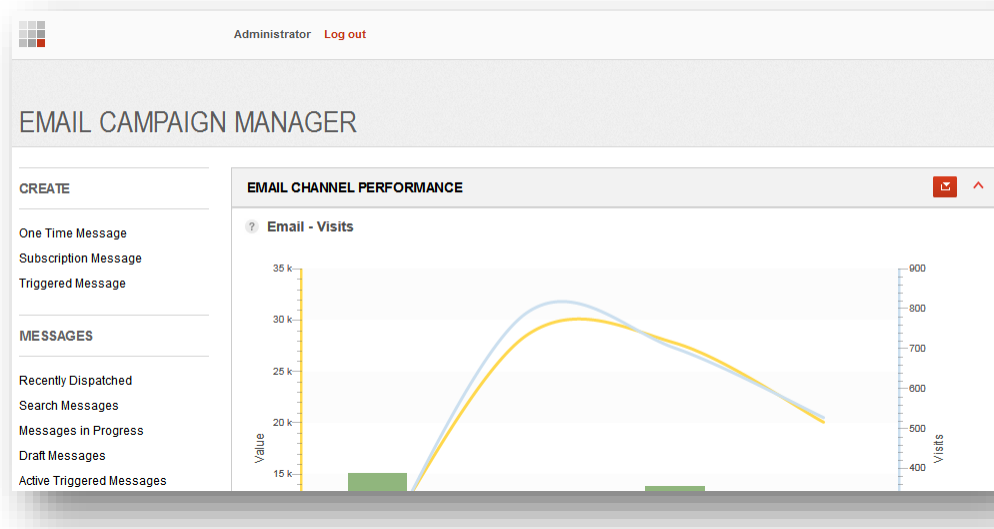
The first step to starting your email campaign is accessing ECM.

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**.



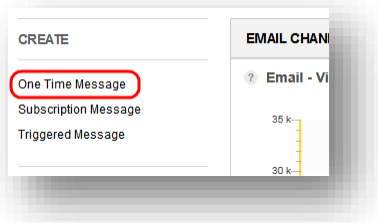
For more information about accessing ECM, see *Section 3.1, How to Access the E-Mail Campaign Manager*.

2.2 Creating a Message

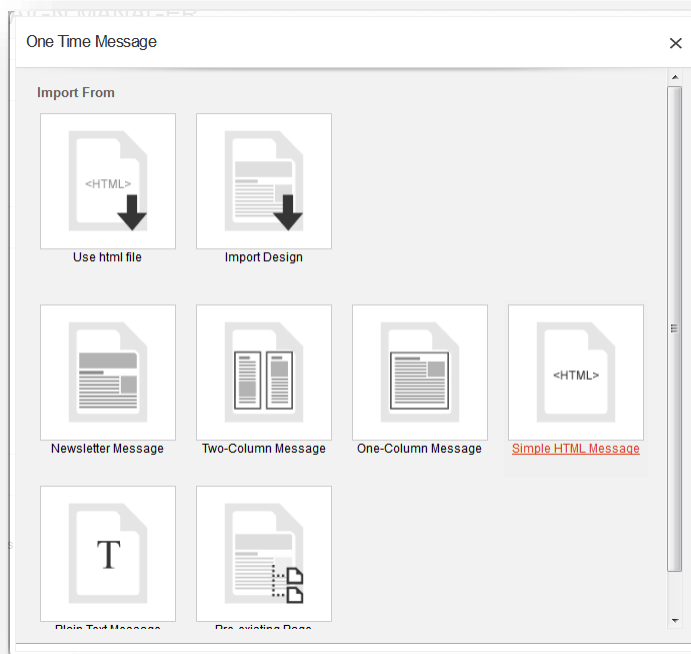
You must create your message before you send it.

This section describes how to create a message:

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



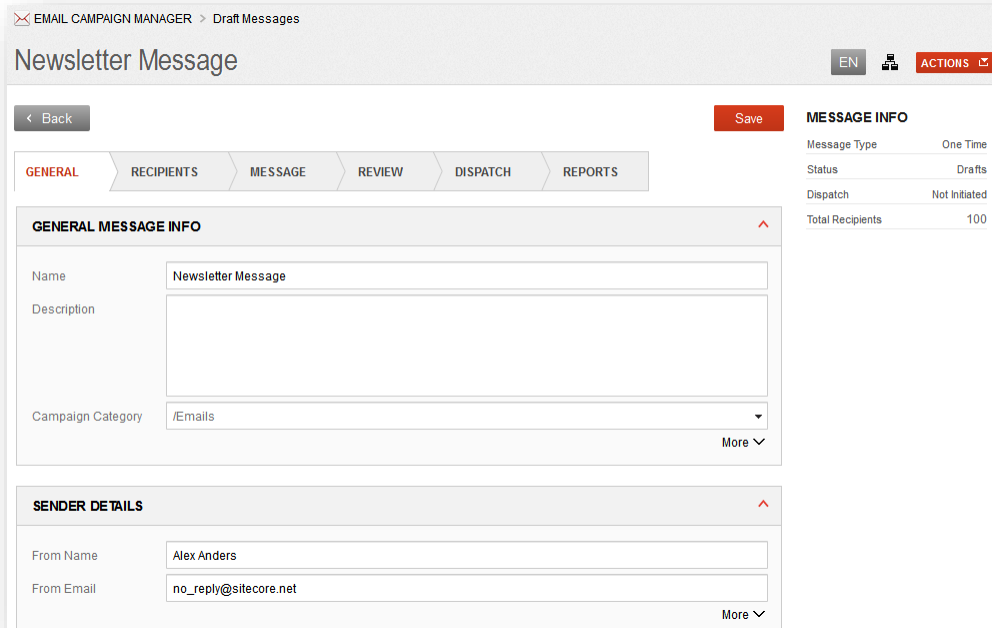
ECM displays the dialog box with the available templates.



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:



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*.

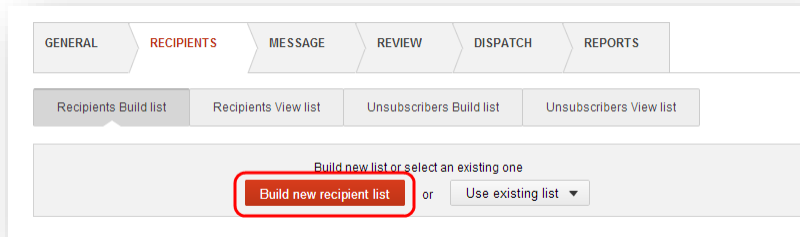
For more information about importing a design, see *Section 3.12, Importing a Design from a Webpage*.

2.3 Building a Recipient List

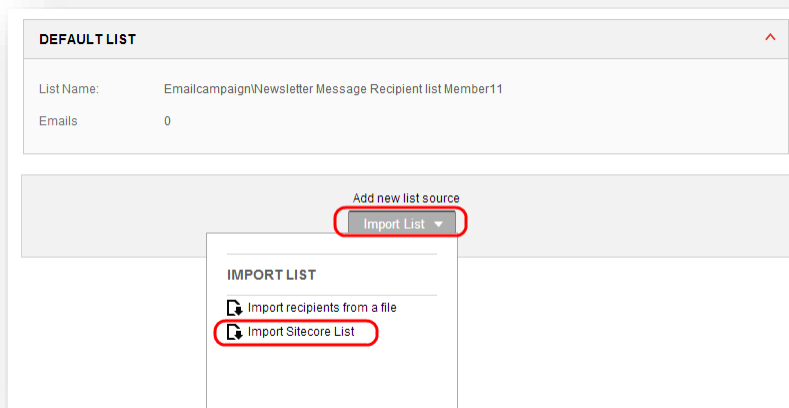
You can import a Sitecore list and use it as a recipient list or import a recipient list from a file.

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**.

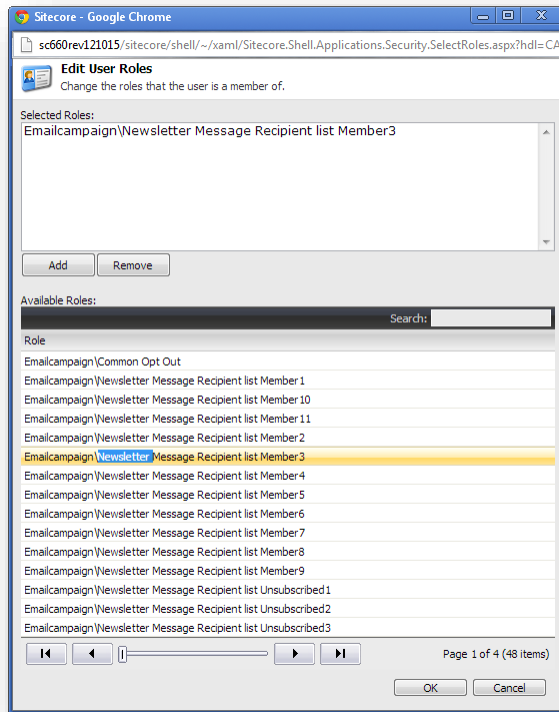


3. Click **Import List**.



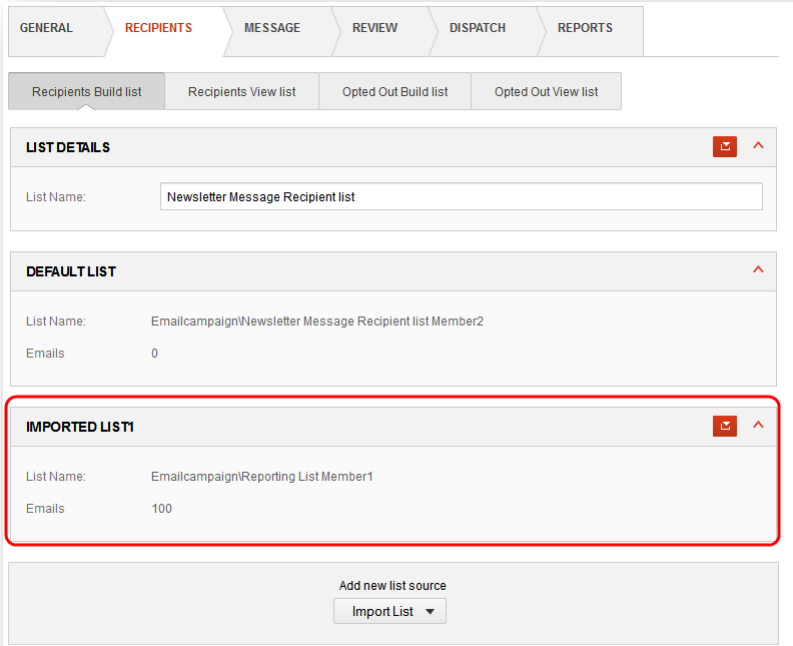
4. In the **Import List** dropdown list, click **Import Sitecore List**.

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



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.



GENERAL RECIPIENTS MESSAGE REVIEW DISPATCH REPORTS

Recipients Build list Recipients View list Opted Out Build list Opted Out View list

LIST DETAILS

List Name: Newsletter Message Recipient list

DEFAULT LIST

List Name: Emailcampaign\Newsletter Message Recipient list Member2

Emails: 0

IMPORTED LIST

List Name: Emailcampaign\Reporting List Member1

Emails: 100

Add new list source

Import List

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.

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*.

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:

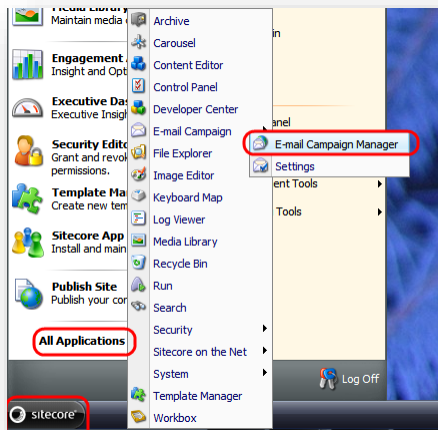
- How to Access the E-Mail Campaign Manager
- How to Create a Message
- How to Find an Existing Message
- How to Edit a Message
- How to Add a Message Version for a Different Language
- How to Perform A/B Testing
- How to Duplicate an Existing Message
- ECM Message Types
- How to Save a Message as a 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

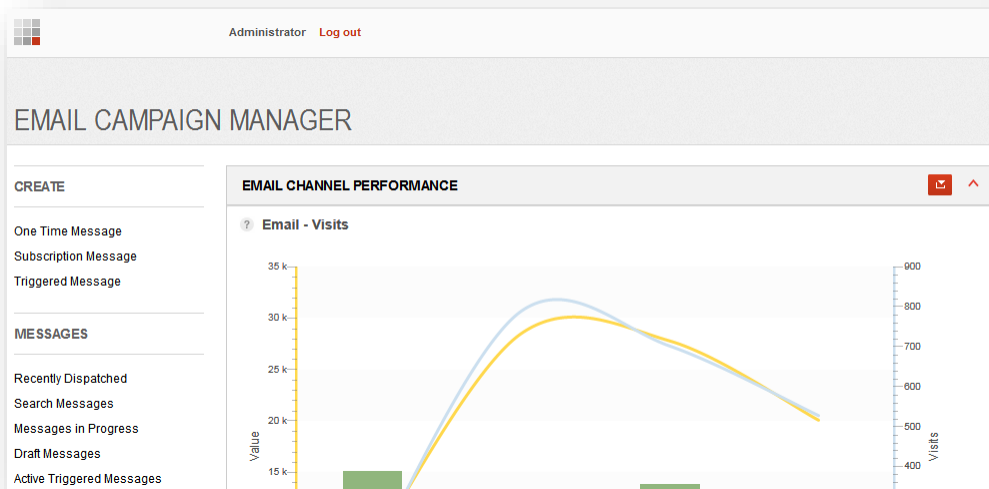
You can access ECM from the **Sitecore Desktop** and from the **Page Editor**.

To access ECM from the **Sitecore Desktop**:

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



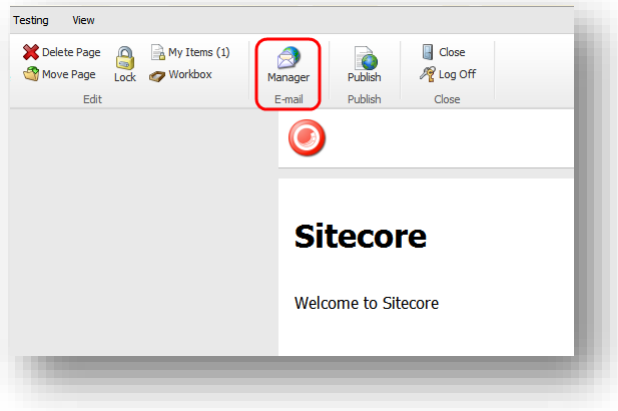
Sitecore starts the **Email Campaign Manager**.



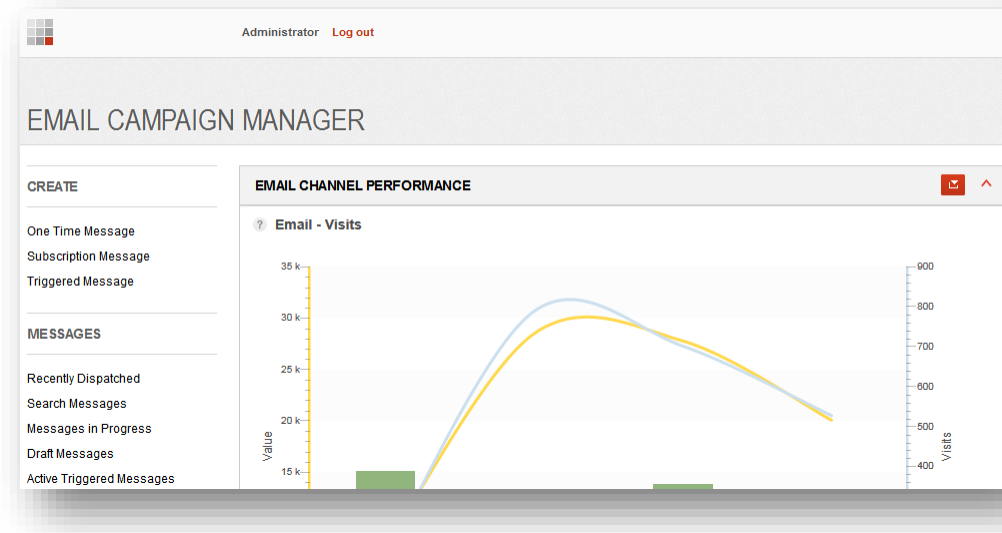
To access ECM from the **Page Editor** interface:

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**.

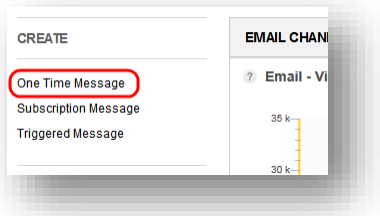


3.2 How to Create a Message

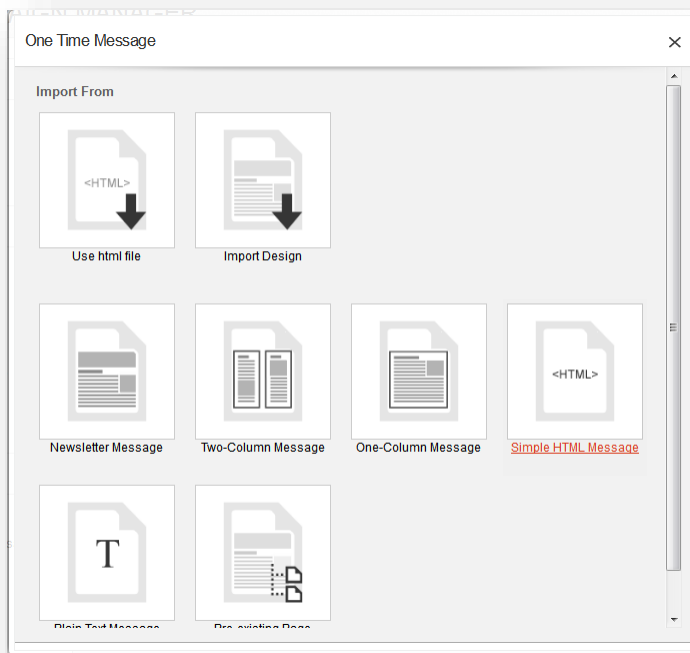
This section describes how to create a new message.

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.



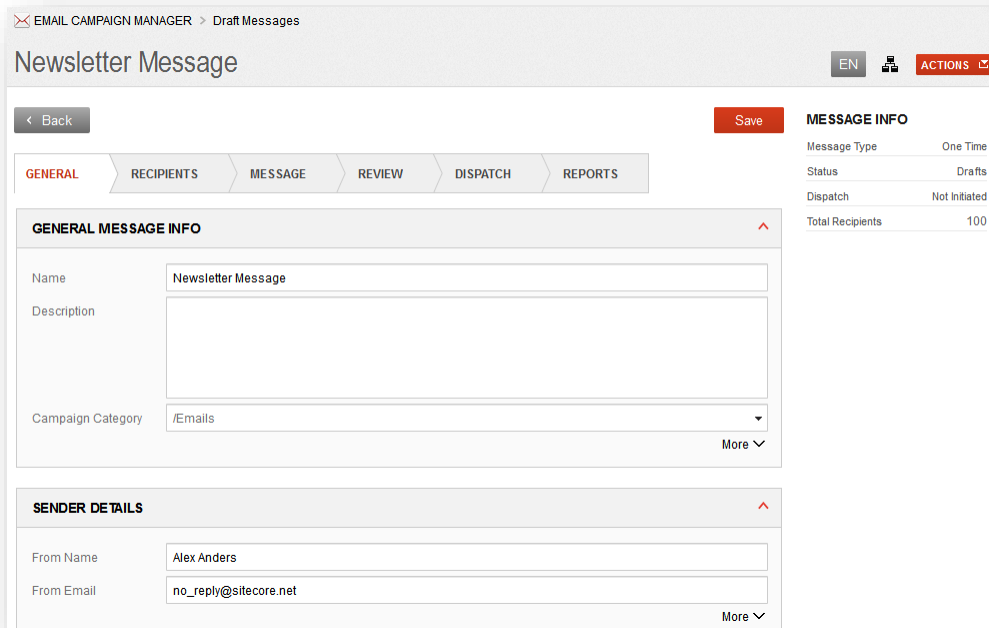
ECM displays the dialog box with the available templates.



2. 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:



The screenshot displays the 'Newsletter Message' configuration page in the Sitecore Email Campaign Manager. The page is titled 'Newsletter Message' and includes a 'Save' button. A navigation breadcrumb shows 'EMAIL CAMPAIGN MANAGER > Draft Messages'. The main content area is divided into several sections:

- GENERAL MESSAGE INFO:** Contains fields for 'Name' (filled with 'Newsletter Message'), 'Description', and 'Campaign Category' (set to '/Emails').
- SENDER DETAILS:** Contains fields for 'From Name' (filled with 'Alex Anders') and 'From Email' (filled with 'no_reply@sitecore.net').
- MESSAGE INFO:** A summary panel on the right showing 'Message Type' (One Time), 'Status' (Drafts), 'Dispatch' (Not Initiated), and 'Total Recipients' (100).

Navigation tabs at the top include 'GENERAL', 'RECIPIENTS', 'MESSAGE', 'REVIEW', 'DISPATCH', and 'REPORTS'. A 'Back' button is located in the top left corner.

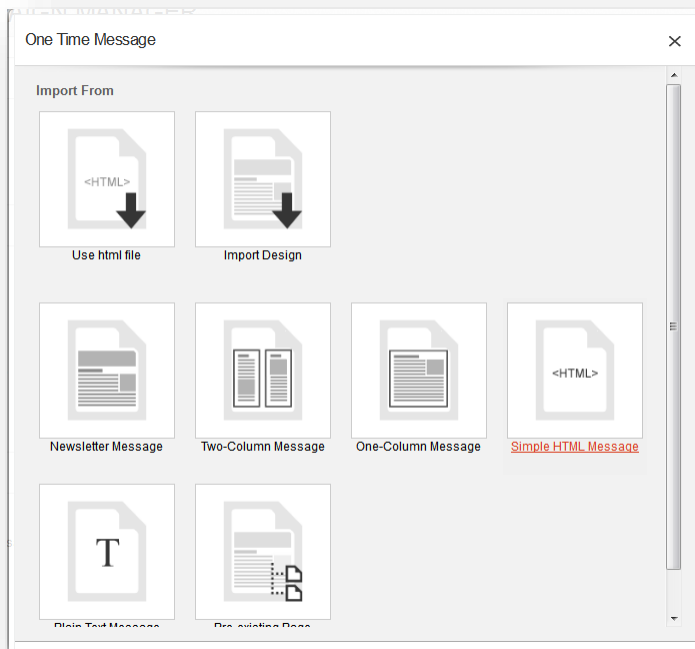
3. Give the message a name to identify it and edit the fields in the **General** tab, if necessary. For more information about the **General** tab, see *Section 3.12, Importing a Design from a Webpage*.

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:



- **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).

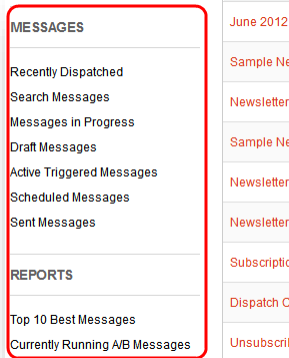
- 2) ECM ignores the security settings. In this case ECM renders all elements on the page and all recipients receive the same message.

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

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:



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.

Recently Dispatched

CREATE	NAME	STATUS	DATE IN C...	SENT TO	OPEN RATE	CLICK RATE	VALUE PE...	VALUE PE...	VISITS PE...
One Time Message	Message 20	Paused	01/13/13 1...	<div style="width: 50%;"></div>	88 %	77 %	51.21	39.83	1.29
Subscription Message	Message 10	Sent	01/13/13 1...	95	92 %	77 %	60.44	44.86	1.35
Triggered Message	Message 19	Select Win...	01/10/13 2...	<div style="width: 50%;"></div>	85 %	64 %	41.23	40.71	1.01
Recently Dispatched	Message 9	Sent	01/10/13 2...	94	83 %	66 %	41.57	39.08	1.06
Search Messages									

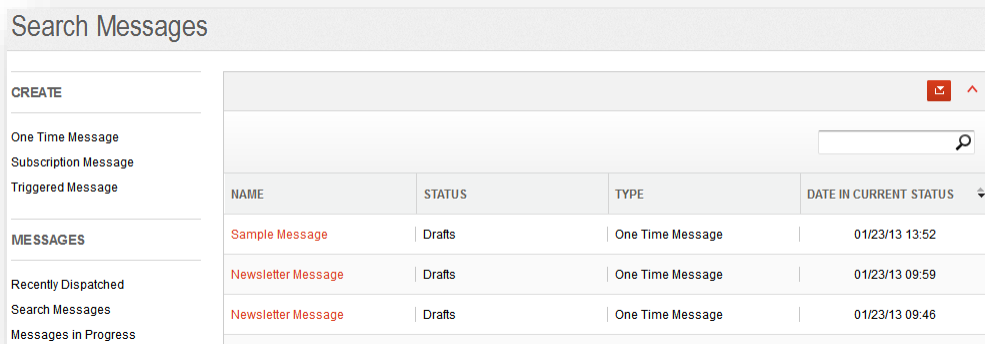
The resulting table contains the following columns:

- **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.



The screenshot shows the 'Search Messages' interface. On the left, there are navigation links: CREATE, One Time Message, Subscription Message, Triggered Message, MESSAGES, Recently Dispatched, Search Messages, and Messages in Progress. The main area contains a table with the following data:

NAME	STATUS	TYPE	DATE IN CURRENT STATUS
Sample Message	Drafts	One Time Message	01/23/13 13:52
Newsletter Message	Drafts	One Time Message	01/23/13 09:59
Newsletter Message	Drafts	One Time Message	01/23/13 09:46

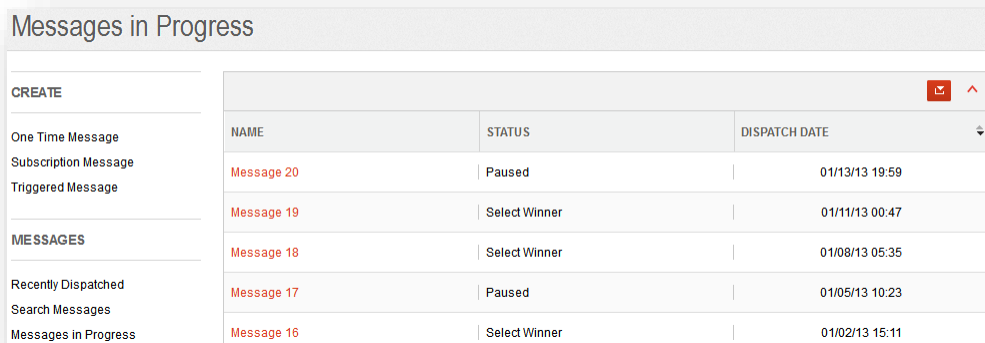
The resulting table contains the following columns:

- **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.



The screenshot shows the 'Messages in Progress' interface. On the left, there are navigation links: CREATE, One Time Message, Subscription Message, Triggered Message, MESSAGES, Recently Dispatched, Search Messages, and Messages in Progress. The main area contains a table with the following data:

NAME	STATUS	DISPATCH DATE
Message 20	Paused	01/13/13 19:59
Message 19	Select Winner	01/11/13 00:47
Message 18	Select Winner	01/08/13 05:35
Message 17	Paused	01/05/13 10:23
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.

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.

Draft Messages	
CREATE	
One Time Message	
Subscription Message	
Triggered Message	
MESSAGES	
Recently Dispatched	
Search Messages	
Messages in Progress	
Draft Messages	

NAME	TYPE	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
February Newsletter	One Time Message	01/23/13 13:51	01/23/13 13:52

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.

Active Triggered Messages	
CREATE	
One Time Message	
Subscription Message	
Triggered Message	
MESSAGES	
Recently Dispatched	
Search Messages	
Messages in Progress	
Draft Messages	
Active Triggered Messages	
Scheduled Messages	
Sent Messages	

NAME	A/B TEST	RECIPIENTS	OPEN RATE	VALUE PER EMAIL...	VALUE PER VISIT
Message 29		100	84 %	39.14	32.39
Subscription Conf...		0	0 %	0.00	0.00
Message 26		100	91 %	62.12	42.62
Message 22		100	85 %	58.82	45.80
Message 23		100	89 %	56.84	43.09
Subscription Notifi...		0	0 %	0.00	0.00
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.
- **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	TYPE	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	Message 10	Sent	Subscription Message	01/13/13 19:09
Draft Messages	Message 11	Paused	One Time Message	12/19/12 14:21
Active Triggered Messages	Message 12	Select Winner	Subscription Message	12/22/12 09:33
Scheduled Messages				
Sent Messages				

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

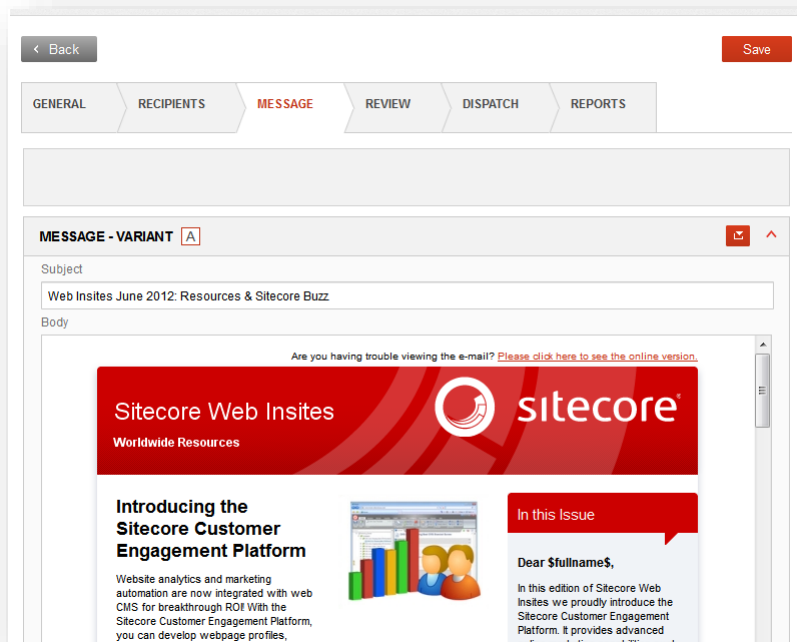
3.4 How to Edit a Message

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.



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

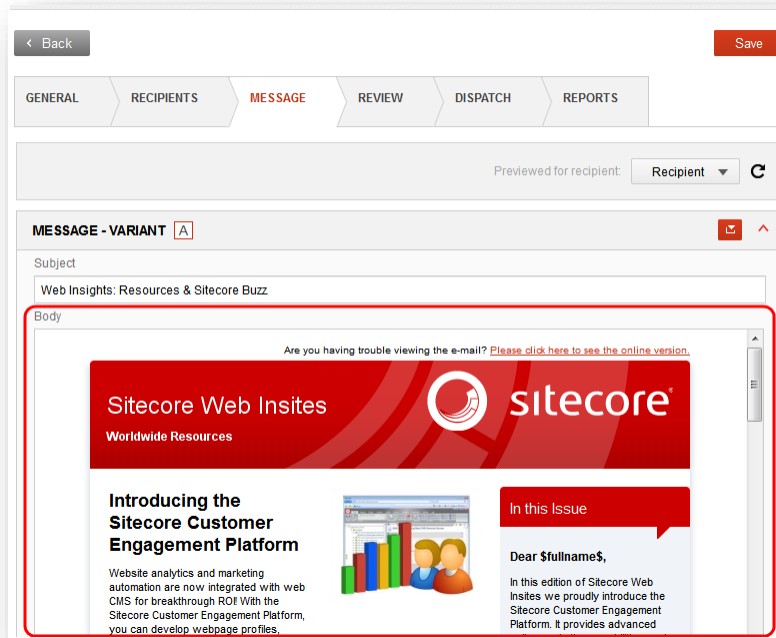
In the message body, you can either insert the tokens by typing them in the message:



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:

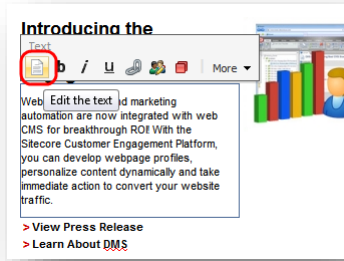
1. In the **Message** tab, click on the **Body** field to start the **Page Editor**.



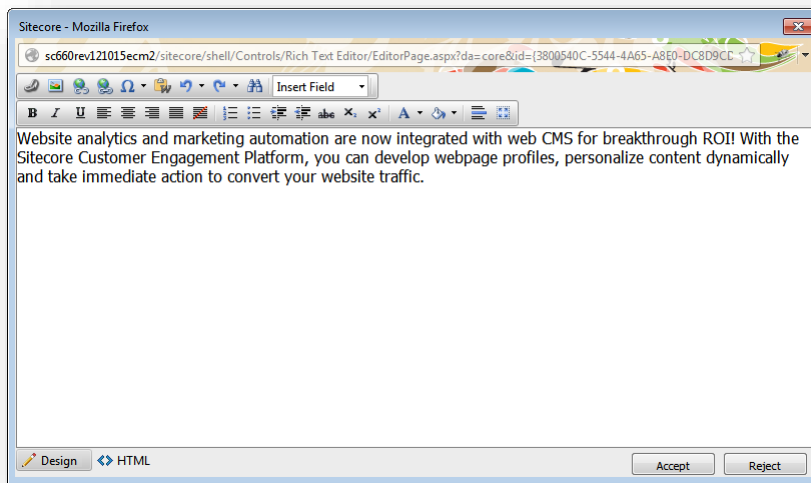
ECM opens the message in the **Page Editor**.



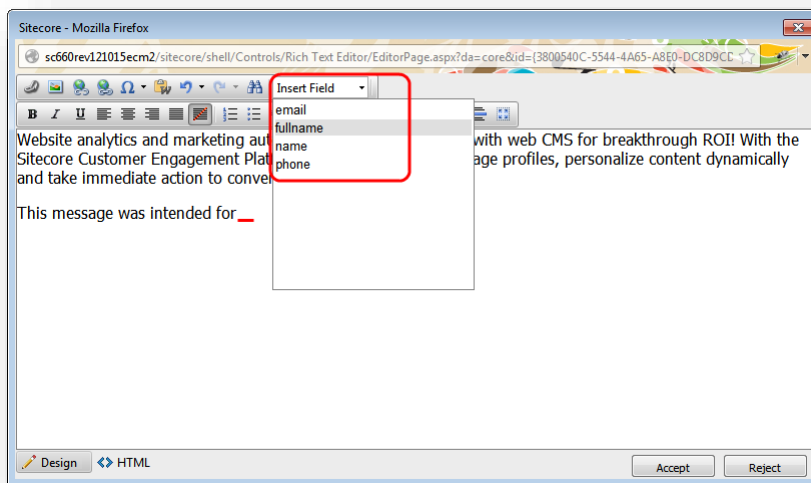
- Place the cursor in the field in which you want to insert a token. Sitecore displays the context menu. In the menu, click the **Edit the text** button .



The module opens the rich text editor.

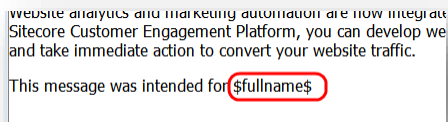


- In the editor, place the cursor where you want to insert a token. Click **Insert Field**:

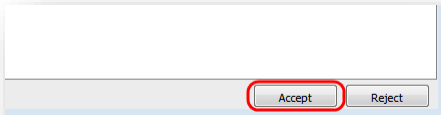


Select the token from the list of available tokens.

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

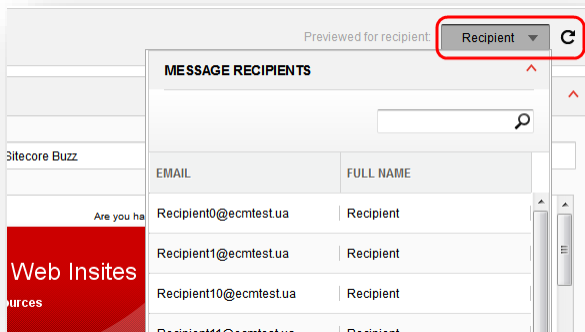


4. At the lower right corner of the editor, click **Accept**:

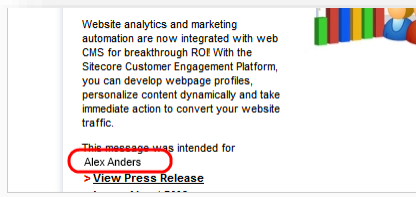


Save the changes and close the editor.

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:



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

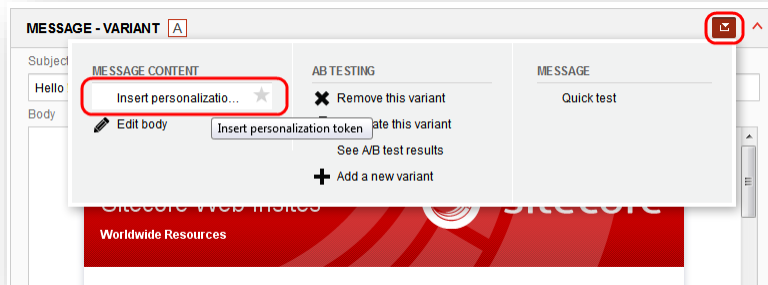


How to Add a Token to the Message Subject

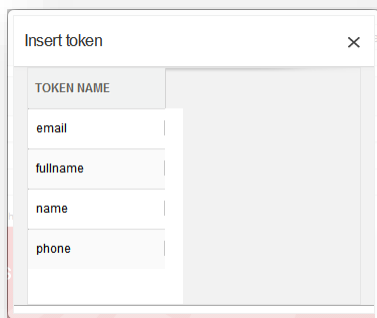
To add a token to a message subject:

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**.



ECM displays the **Insert token** dialog box:

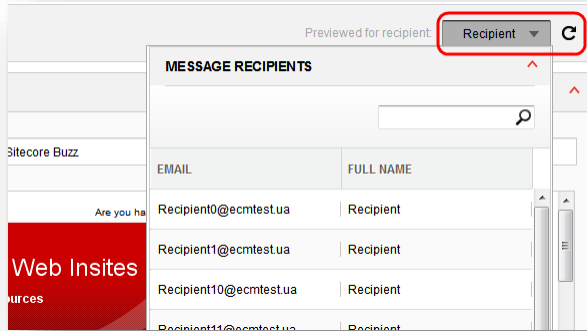


Select a token.

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:



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

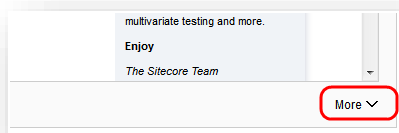


3.4.3 How to Set Alternative Text for a Message (Shown in non-HTML E-mail Clients)

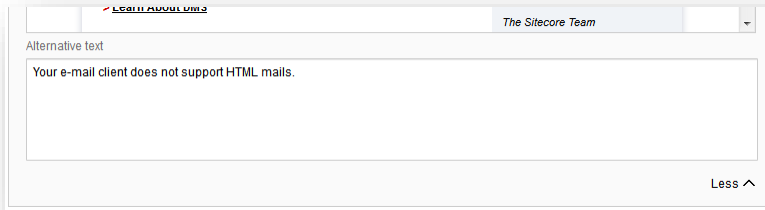
Alternative text is a plain text version of the message. This text is used when the program that the subscriber uses to read the message cannot read the HTML version of the message.

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:



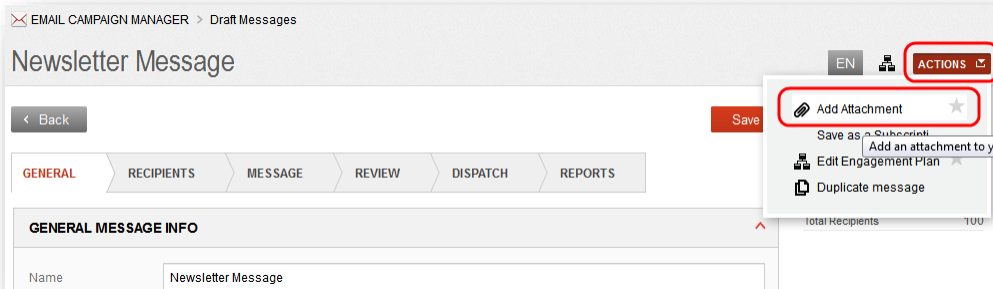
Enter the alternative text and save the message.



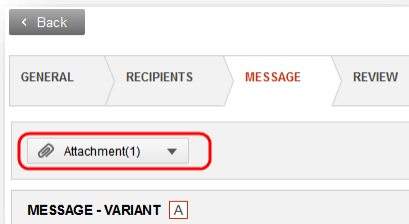
3.4.4 How to Add Attachments to a Message

To add attachments to a message:

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

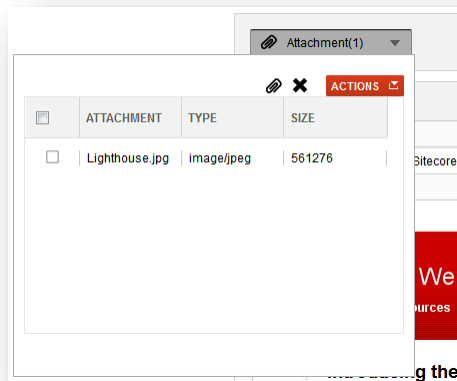


1. In the **Actions** dialog box, select **Add attachments**.
2. In the prompt dialog, select a file that you want to attach **OK**.
3. The module attaches the file to the message. You see it in the ribbon in the **Message** tab:



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:




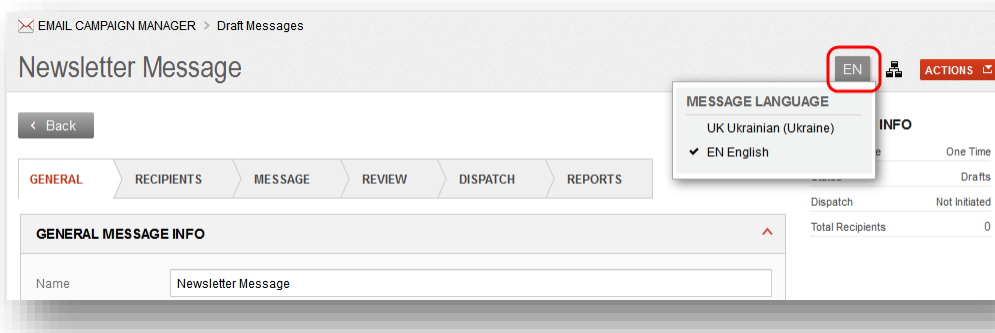
2. Select checkboxes next to attachments that you want to remove.
3. Click **Remove attachments**.

3.5 How to Add a Message Version for a Different Language

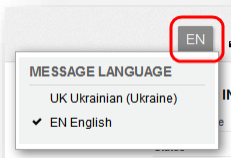
If your website contains more than one language, you can add a message version for a different language using the ECM interface.

To add a message version in a different language:

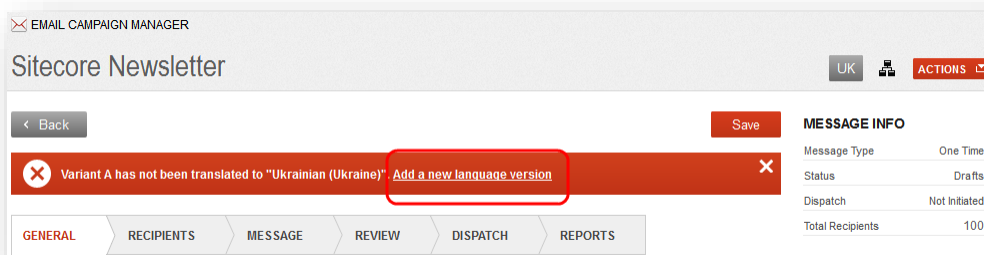
1. Select a message.
2. On the message ribbon, click the **Message Language** button (). This button indicates the currently selected language, which also stands for the current default message language:



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:

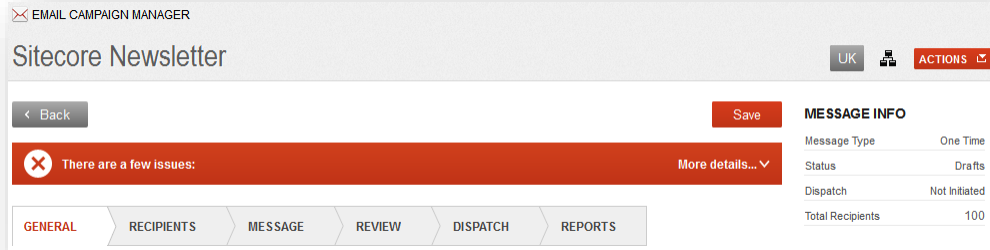


4. Click the new language, and ECM creates a new version of the message in that language. ECM displays the following warning:



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:



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.

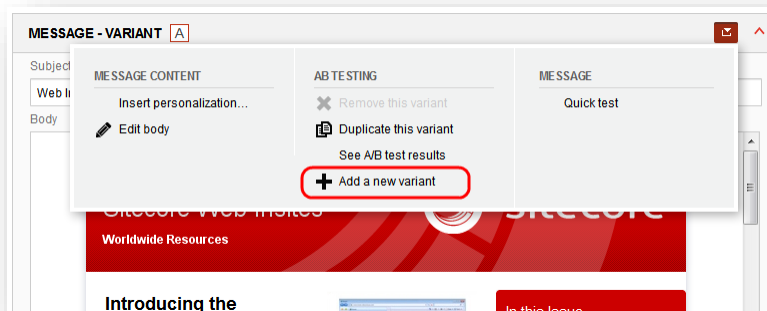
The following sections describe each step in detail.

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:

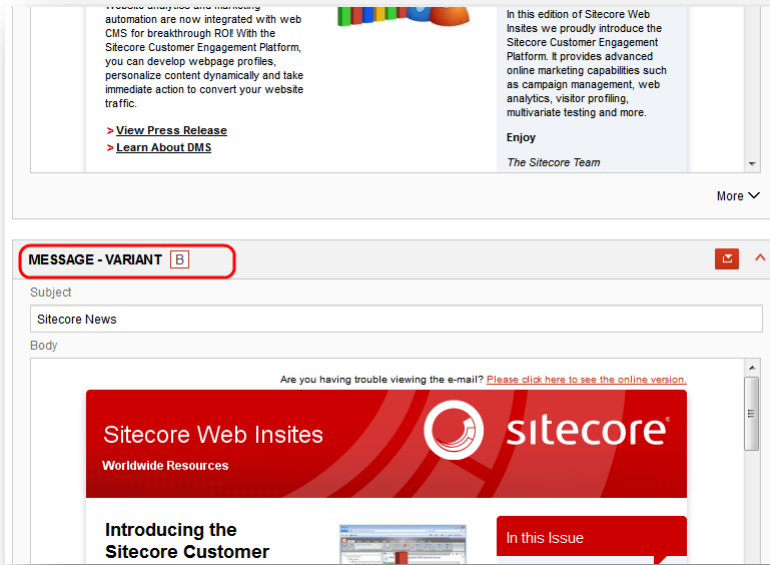
1. Select a message.
2. In the **Message** tab, click the **Actions** button . ECM displays the **Actions** dialog box:



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:



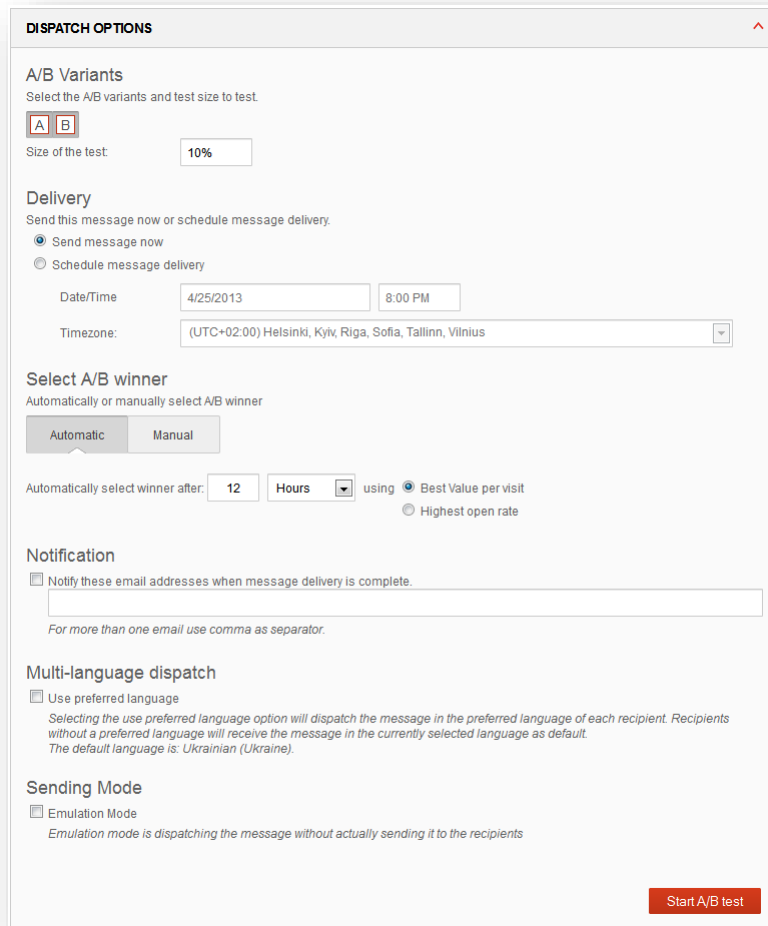
Now you can edit the new message variant. You can perform email preview and spam check actions on specific message variants.

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.

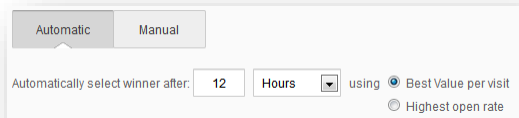
To dispatch selected message variants to a limited set of recipients:

1. Select a message that has multiple variants:



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

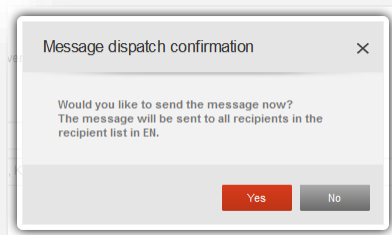
hours:



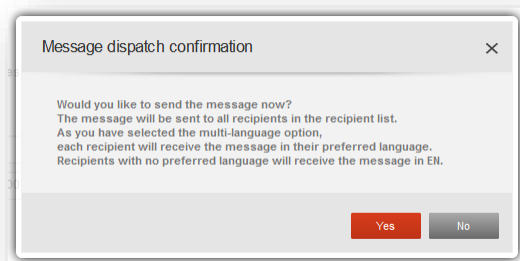
Manual – you review reports yourself and select the variant that you consider the best.

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:



If you selected **Use preferred language** in the **Multi-language dispatch** section, 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.

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.

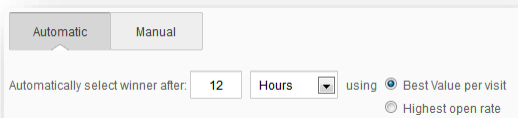
If you choose to select the winner automatically, ECM will do that basing on a certain criterion; for instance, will select the message variant with the best value per visit in a specified number of hours.

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

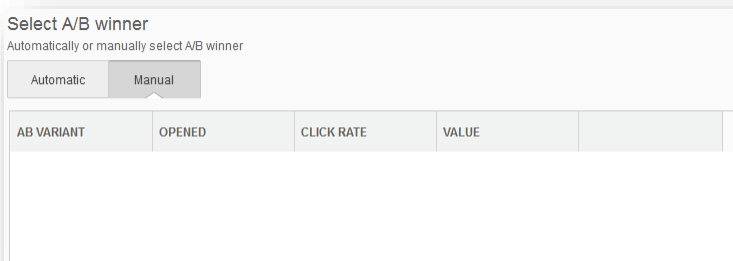
Automatically select winner after: 12 Hours using Best Value per visit Highest open rate

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 winner

Automatically or manually select A/B winner

Automatic Manual

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:

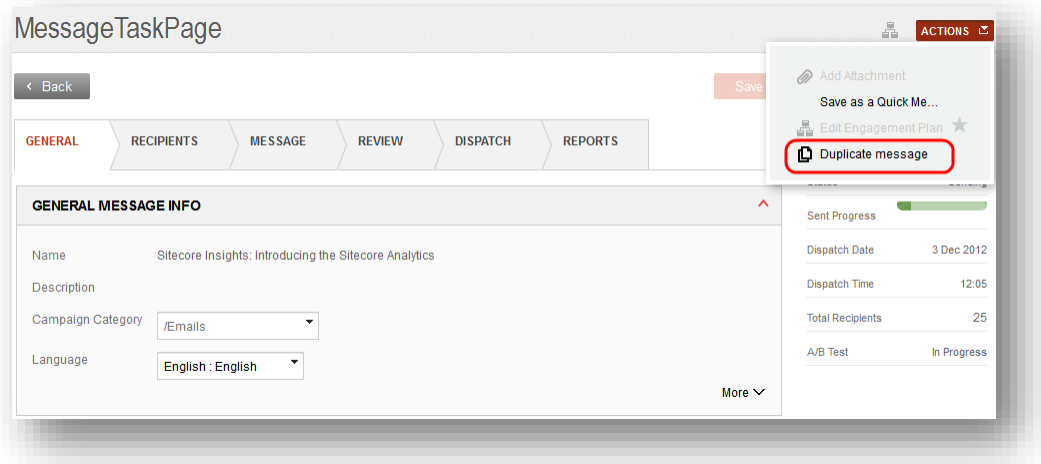
- First recipient – Variant A.
- Second recipient – Variant B.
- Third recipient – Variant C.
- Fourth recipient – Variant A.
- And so on.

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 , ECM displays the **Actions** dialog box:



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.

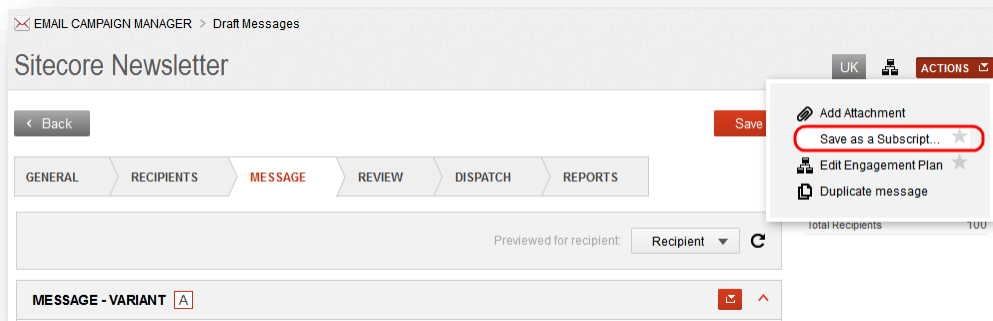
Unlike subscription messages and One Time messages, triggered messages do not have a fixed or defined number of recipients, since the module knows the recipient only when an events or a condition is triggered by that recipient.

3.9 How to Save a Message as a Subscription Message

To save a message as a subscription message:

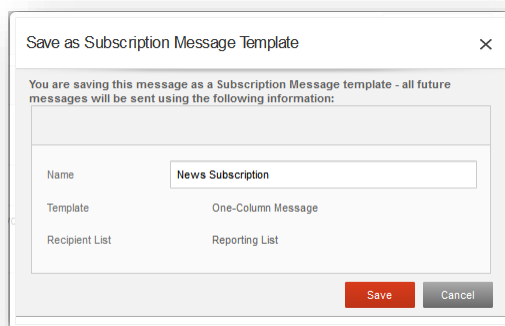
1. Select a message.

The message that you select must already have a recipient list associated with it.
2. In the main ribbon, click **Actions**.



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

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



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.

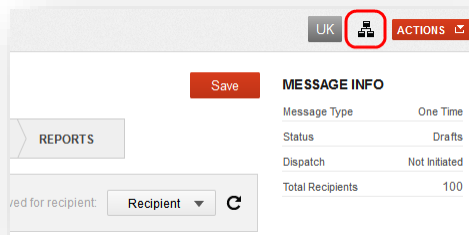
3.10 How to Subscribe a Visitor using an ECM Action

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.

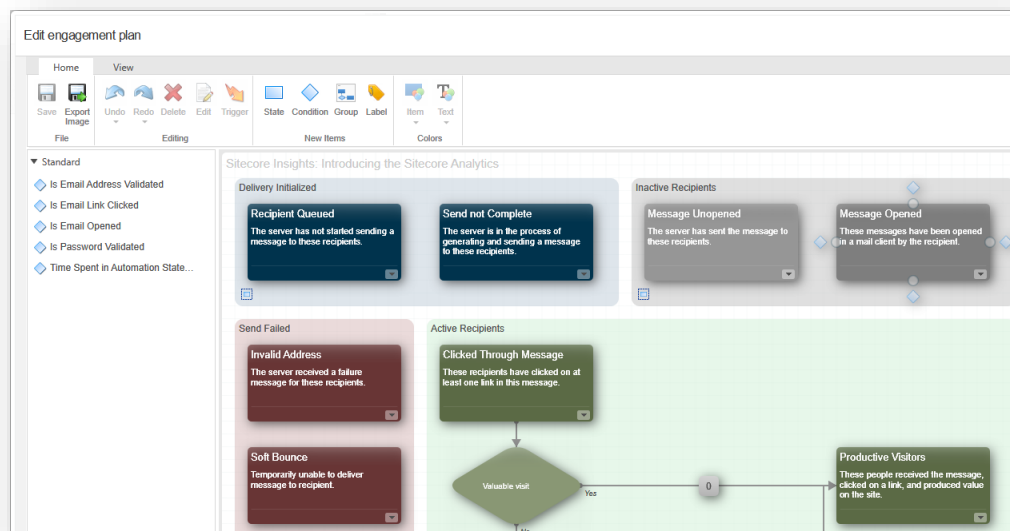
The **Edit Email Audience** action subscribes a visitor to (or unsubscribe a visitor from) one or more recipient lists.

To set the **Edit Email Audience** action:

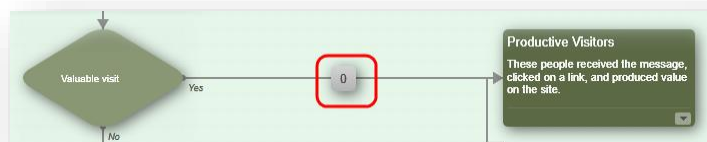
1. Select a message.
2. In the top ribbon, click the **Edit Engagement Plan** button .



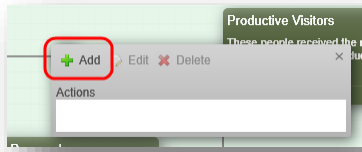
Sitecore opens the message engagement plan.



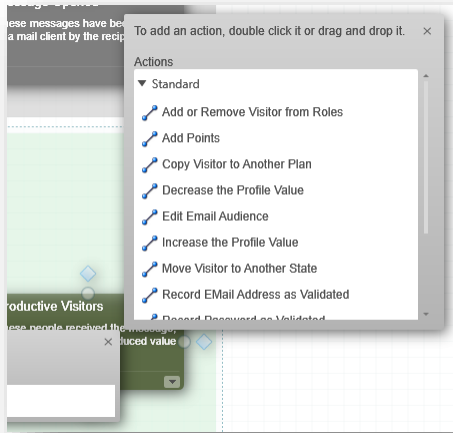
3. Click the square box that is located on a line between states:



The **Actions** dialog box appears:

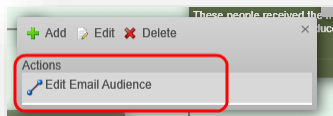


4. Click **Add** and a dialog box appears.

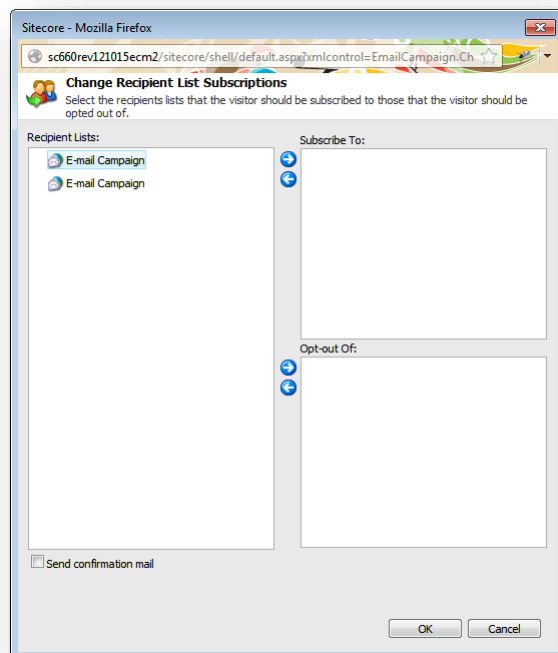


This dialog box lists all of the actions that are available.

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



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



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**.

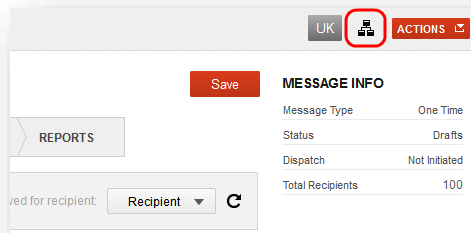
3.11 How to Send a Message Using an ECM Action

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.

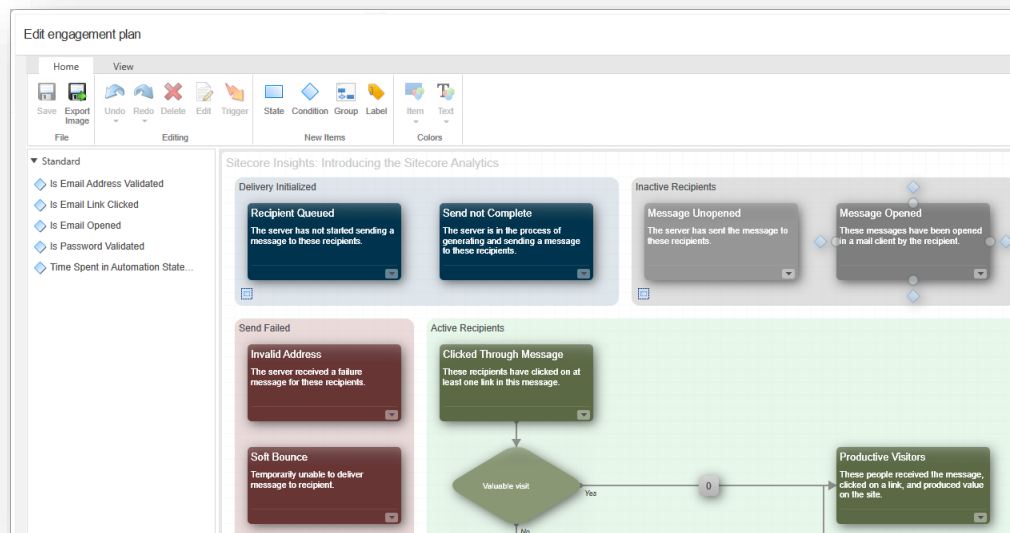
The **Send Email Campaign Message** action sends an email campaign message to a website visitor.

To set the **Send Email Campaign Message** action:

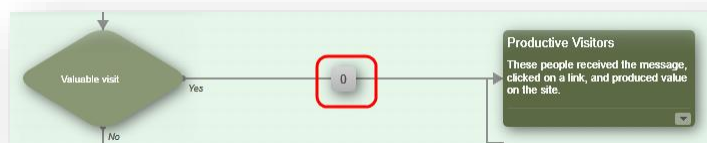
1. Select a message.
2. In the top ribbon, click the **Edit Engagement Plan** button .



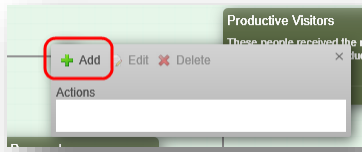
Sitecore opens the message engagement plan.



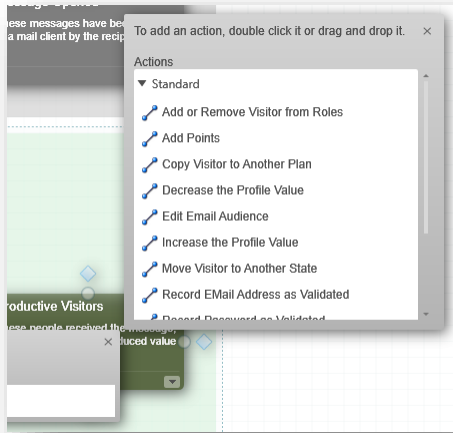
3. Click the square box that is located on a line between states:



The **Actions** dialog box appears:

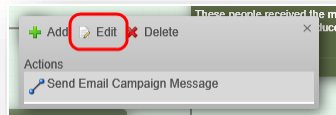


4. Click **Add** and a dialog box appears.



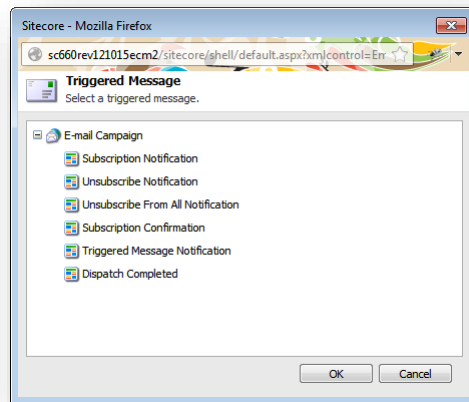
This dialog box lists all of the actions that are available.

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**.

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.

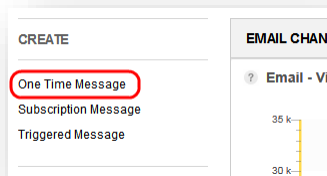
Note

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](#).

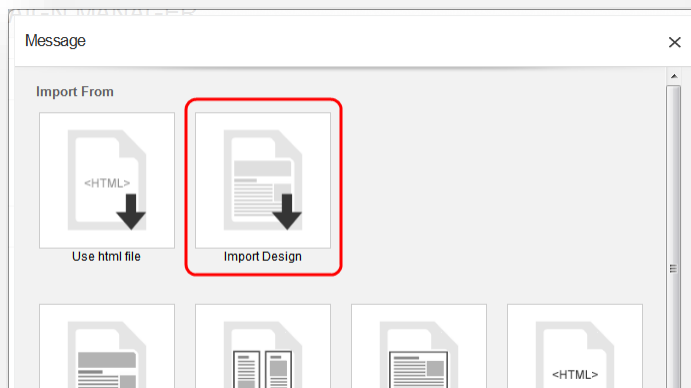
This option is available for messages of the type **One Time Message**.

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:

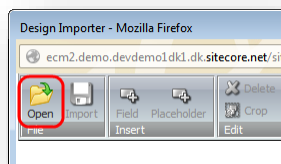


2. In the **Message** dialog box, select **Import Design**.

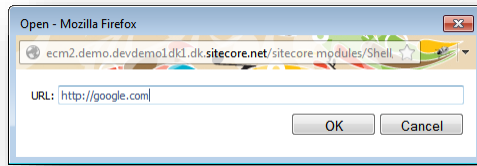


ECM opens the **Design Importer** in a new window.

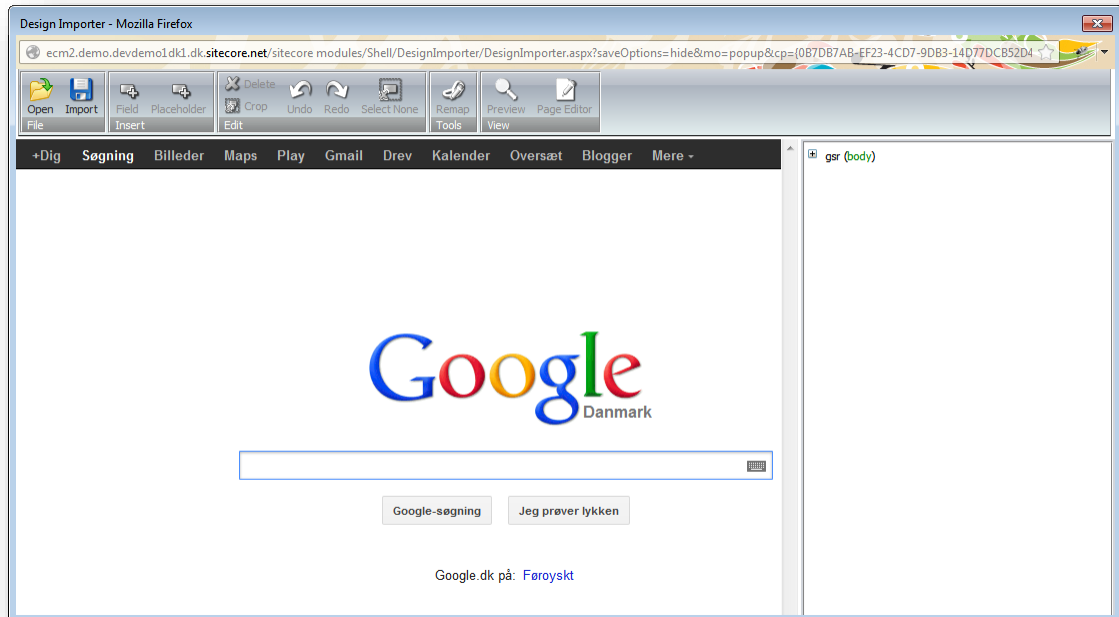
3. In the **Design Importer**, in the **File** group, click **Open**.



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

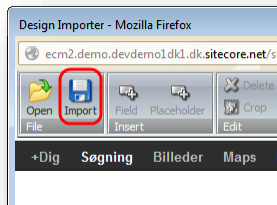


4. In the **Open** dialog box, in the **URL** field, type in the URL of the web page that you want to import. Click **OK** and the Design Importer opens the web page.

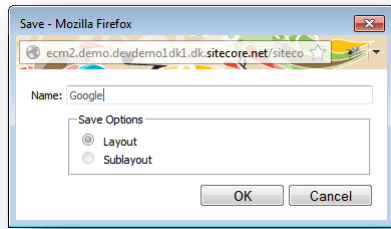


Now you can import the page as it is or edit its elements and import it afterwards. For information about editing page elements in the Design Importer, see the [Design Importer User Guide, Chapter 2, Editing and Importing a Web Page](#).

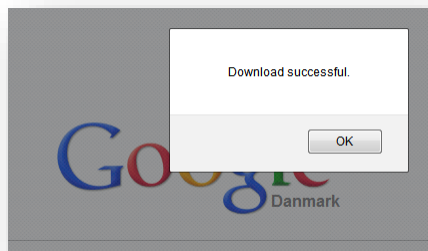
5. When you are done with editing the page elements, click **Import**.



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:

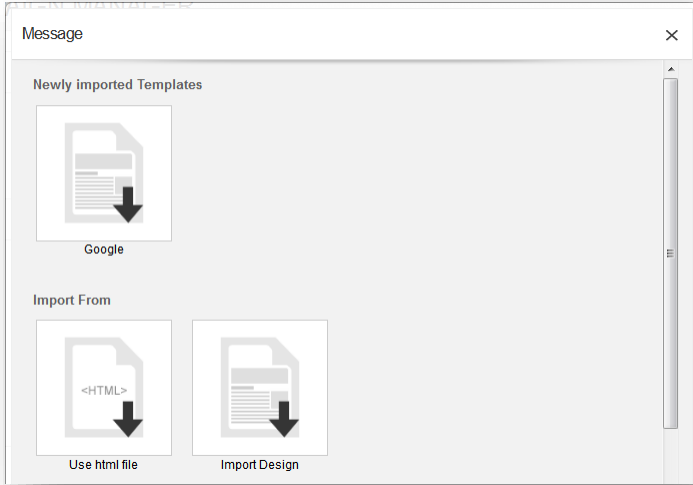


Click **OK**.

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

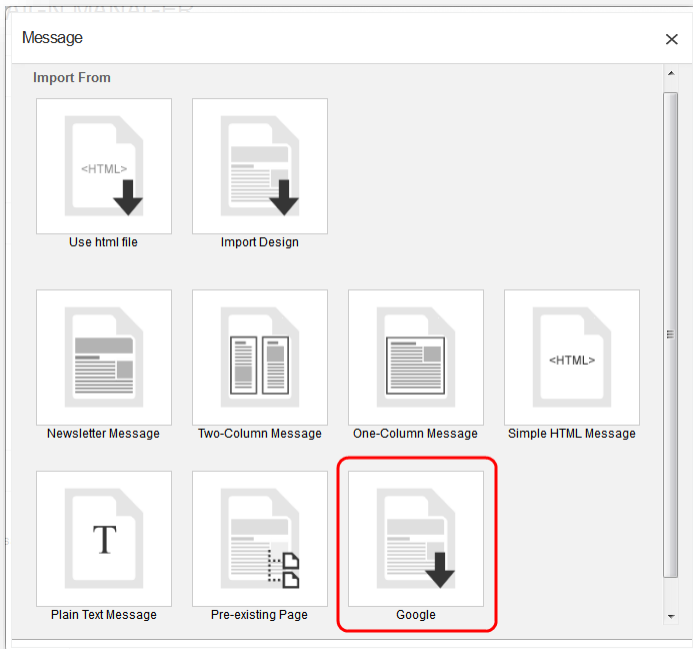


After importing the new template, you see it in the **Newly Imported Templates** section in the One Time Message dialog box:



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

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



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:

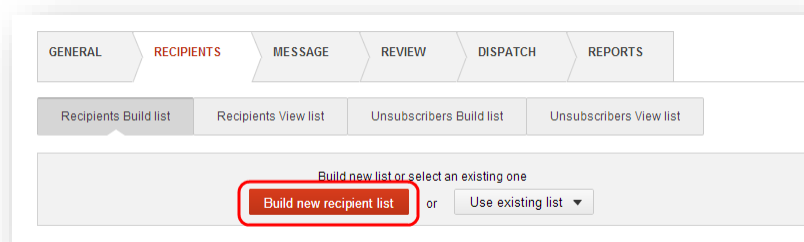
1. Import a Sitecore recipient list.
2. Import recipients from a file.
3. Select an existing recipient list.

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.

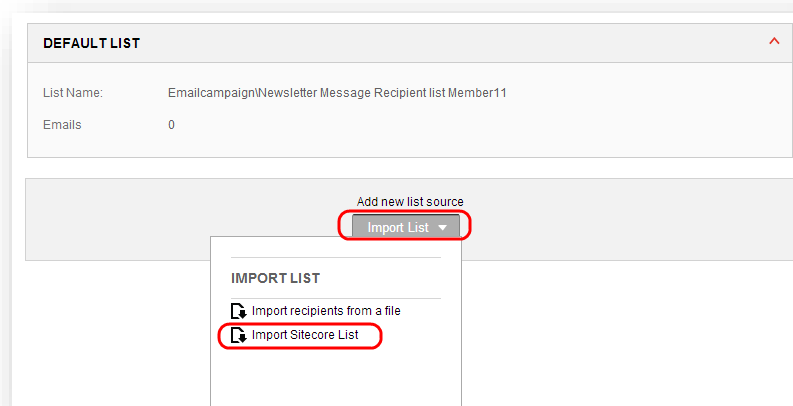
4.1.1 Importing a Sitecore Recipient List

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**.

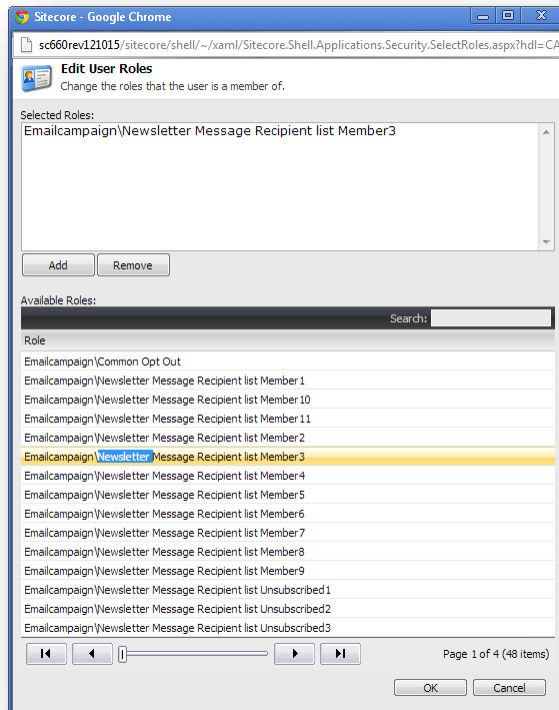


3. Click **Import List**.



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

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



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

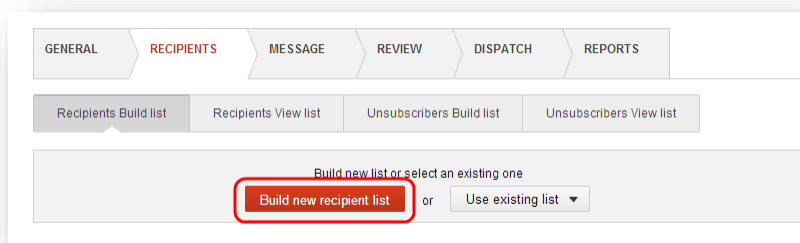
Selected roles are displayed as imported list on the Recipients list tab.

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

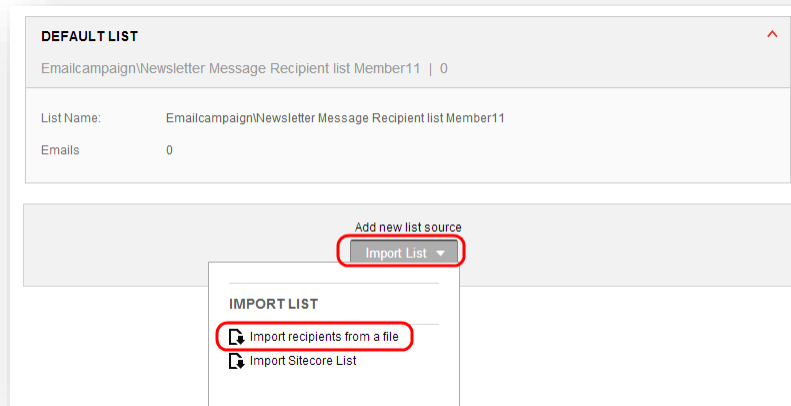
4.1.2 Importing a Recipient List From a File

To import a recipient list from a file:

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

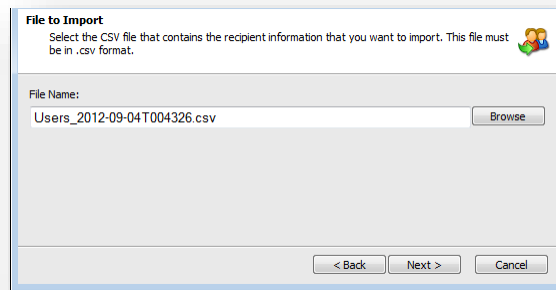


3. Click **Import List**.

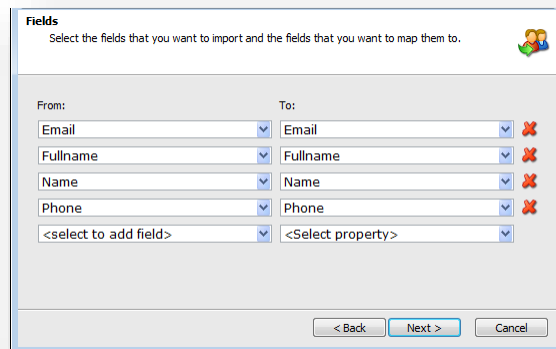


4. In the **Import List** dropdown list, click **Import recipient list from a file**.

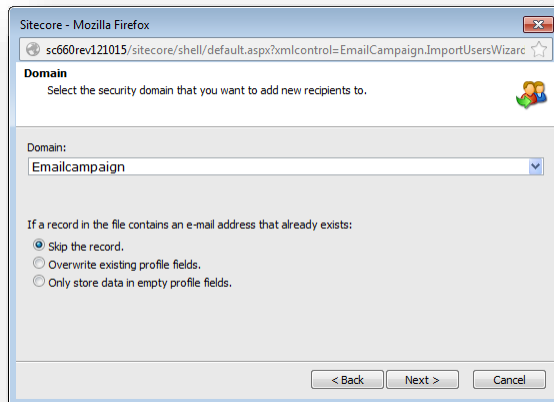
5. In the **Import Recipients** wizard, in the **File to Import** dialog box, select *.csv file from your local disk and click **Next**.



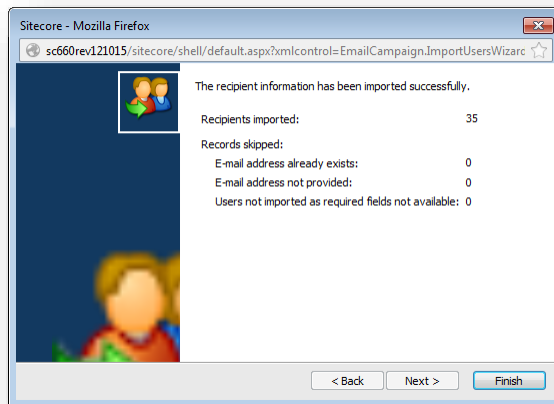
6. In the **Fields** dialog box, manage the fields that you want to export from a file and the fields to which imported data is added.



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



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



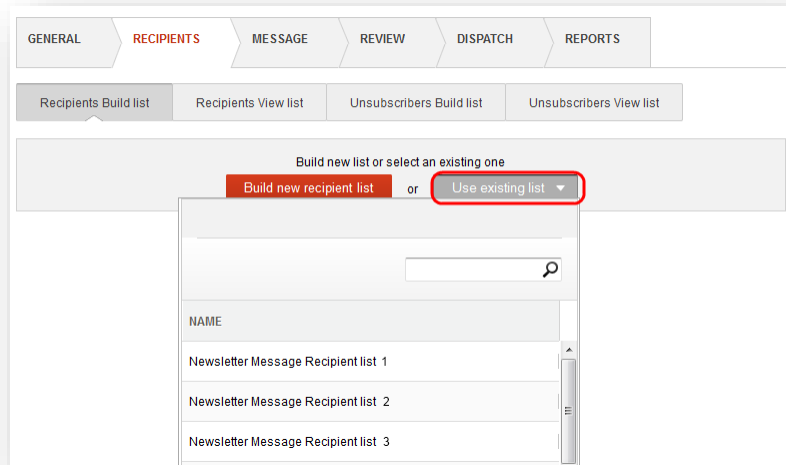
When you imported a recipient list from a file you can add both Sitecore recipient lists and recipient lists from a file.

4.1.3 Selecting an Existing List

To use an existing list:

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

- In the **Recipients** tab, click **Use existing list**.



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


The selected list is displayed in the List details section.

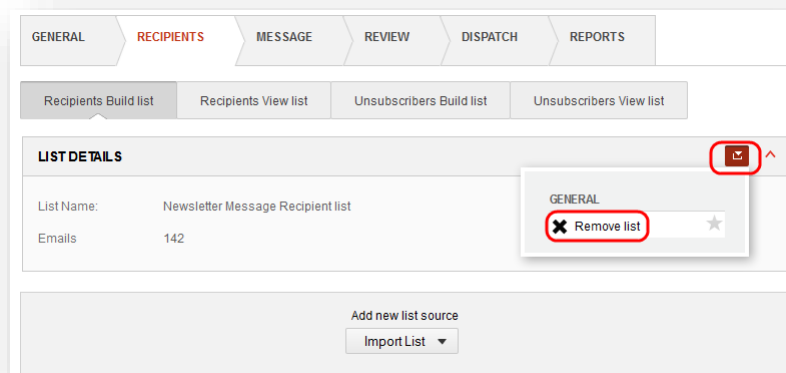
When you selected an existing list, you can add both Sitecore lists and recipient lists from a file. In this case the module creates a new extended list instead of overwriting an existing one.

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:

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

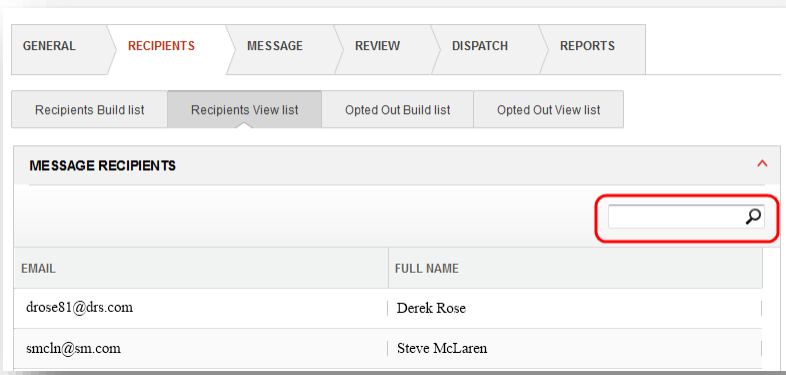


- In the **General** pop-up window, click **Remove list**.

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:



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.

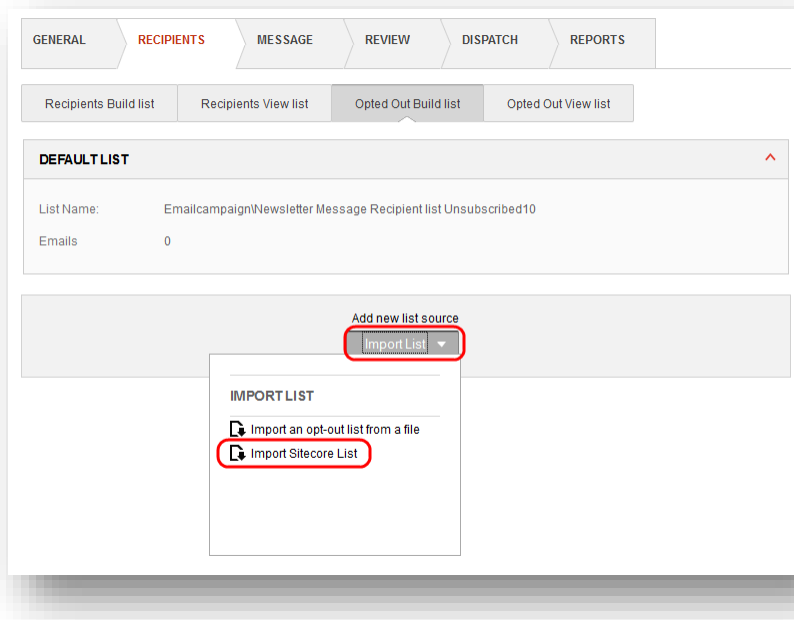
To build an Opted Out list, you can use the following options:

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

4.3.1 Importing a Sitecore List

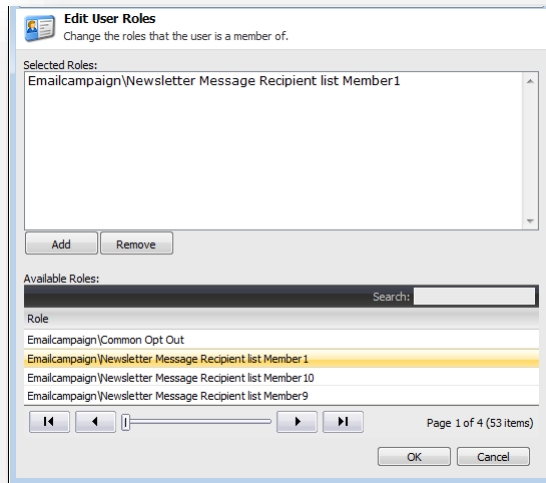
To import a Sitecore list:

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



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

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

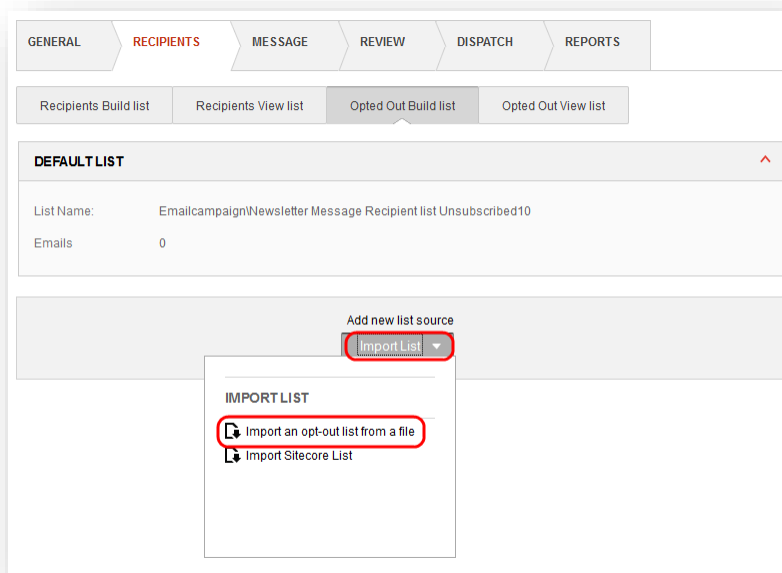


- In the **Edit User Roles** dialog box, click **Ok** to close the dialog box. Selected roles are displayed as imported lists in the Opted Out list tab.

4.3.2 Importing an Opted Out List From a File

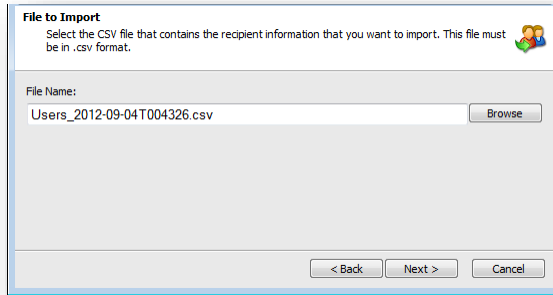
To import an Opted Out list from a file:

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

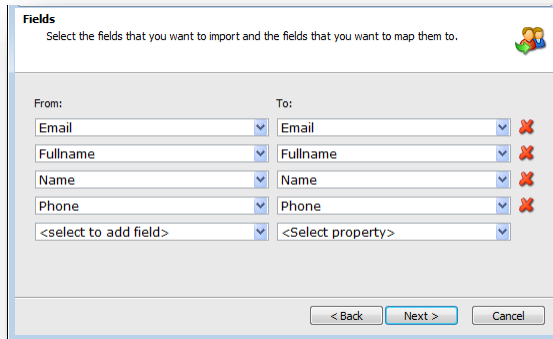


- In the **Import List** dropdown list, click **Import an opted out list from a file**.

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



- 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.




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

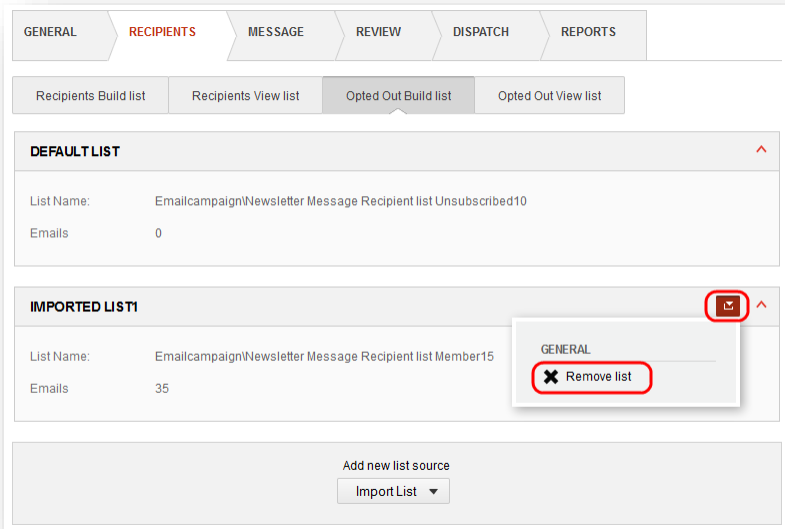


- In the **Domain** dialog box, select the option what the module should do if the imported file contains an existing email.
- Review the import statistics and click **Finish**.

4.3.3 Removing an Opted Out List

To remove an Opted Out list:

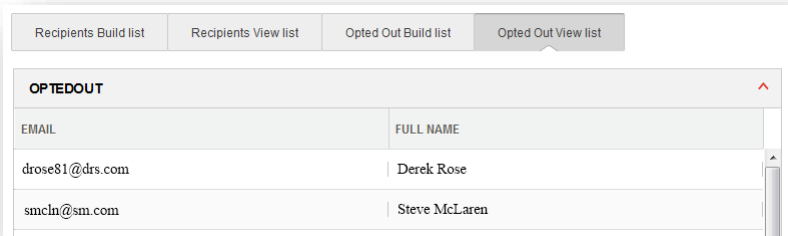
1. In the **Opted Out Build list** tab, click the  **Actions** button.



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.



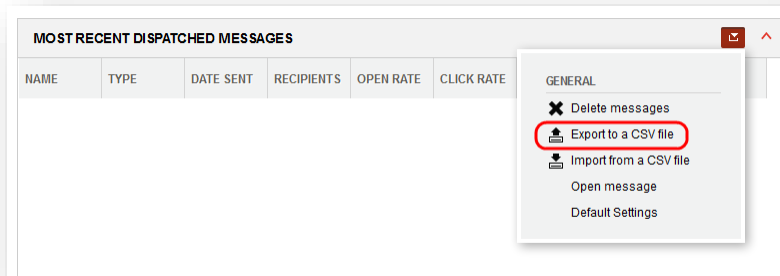
OPTEDOUT	
EMAIL	FULL NAME
drose81@drs.com	Derek Rose
smcln@sm.com	Steve McLaren

4.5 Exporting a Recipient List to a File

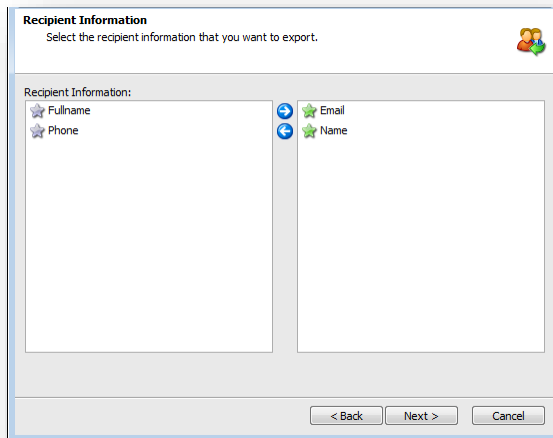
You can export a recipient list to a *.csv file.

To export a recipient list:

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

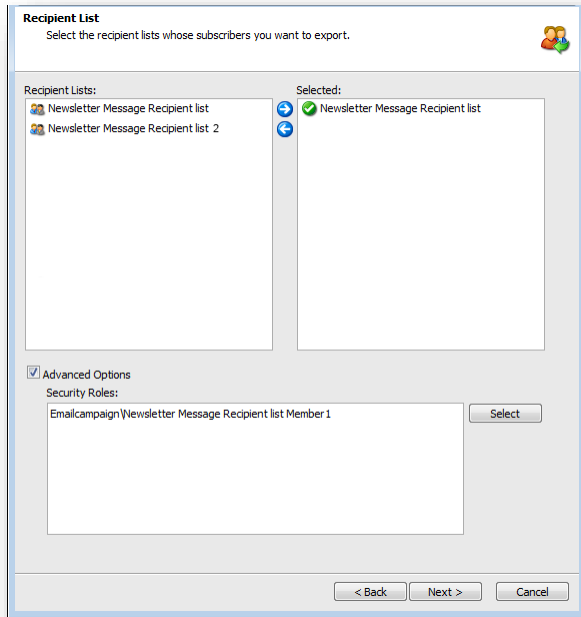


3. In the **General** pop-up window, click **Export to a CSV file**.
4. In the **Recipient Information** dialog box, select the fields that you want to export to a file. Click **Next**.

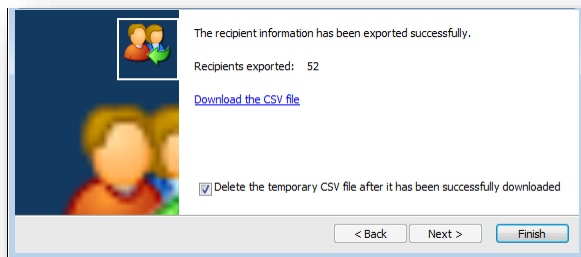


5. In the **Recipient List** dialog box, select the lists that you want to export to a file. To export security roles as well as selected lists, select the **Advanced options** check box and select the

roles. Click **Next**.



6. Download the CSV file and click **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


5.2 How to Preview a Message in Different Email Clients

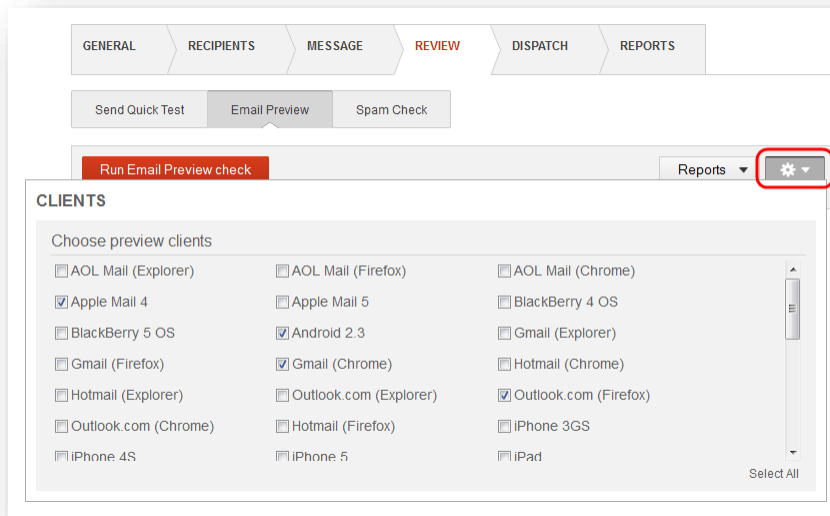
ECM allows you to see how your email message looks in different email clients.

Note

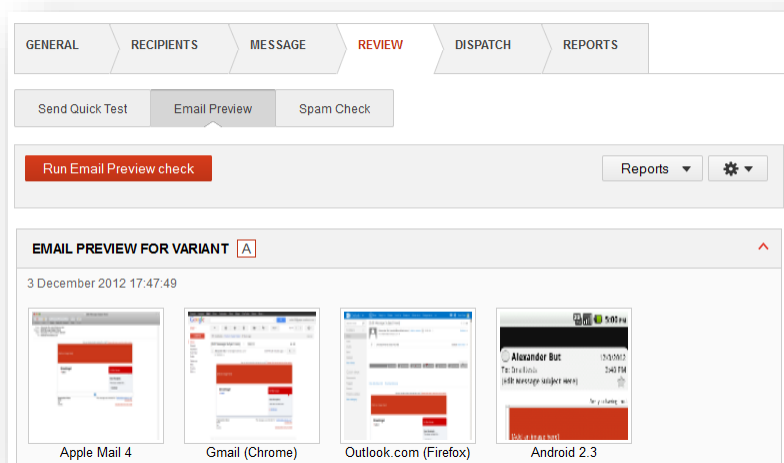
To be able to use this functionality, you must sign up for the Email Preview service in the Sitecore App Center. For more information about this, see the document *Getting Started with Sitecore App Center*.

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.



3. Click **Run Email Preview Check**.



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

5.3 How to Perform a Spam Check

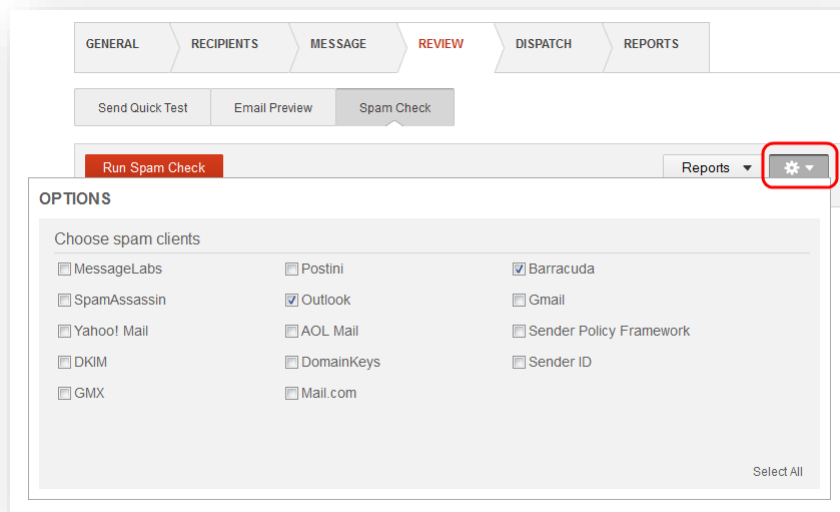
You can test your message to see how different spam filters will treat it.

Note

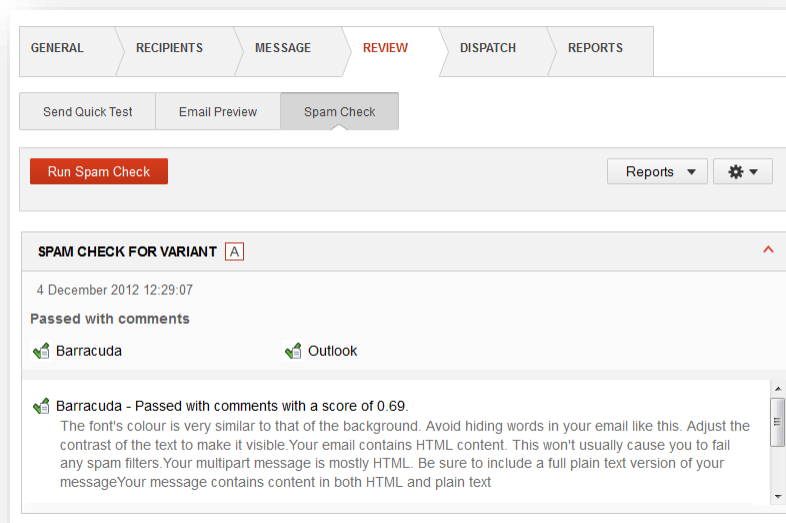
To be able to use this functionality, you must sign up for the Spam Check service in the Sitecore App Center. For more information about this, see the document *Getting Started with Sitecore App Center*.

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.



3. Click **Run Spam Check**.



Spam filters can return different types of results:

- **Failed**

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 your message is in the **Passed with comments** state, this means that the score of your message is higher than the default threshold for this filter, but the comments will help you to considerably increase your 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.

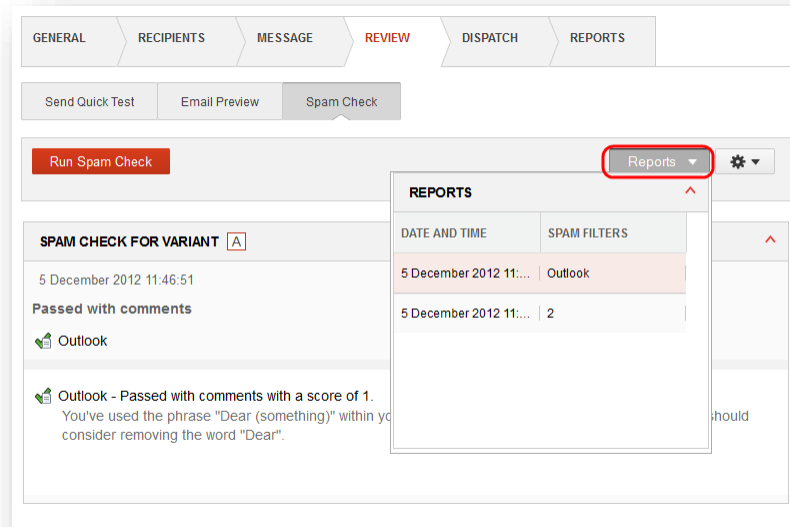
5.3.1 How to view older reports

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**.



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

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.

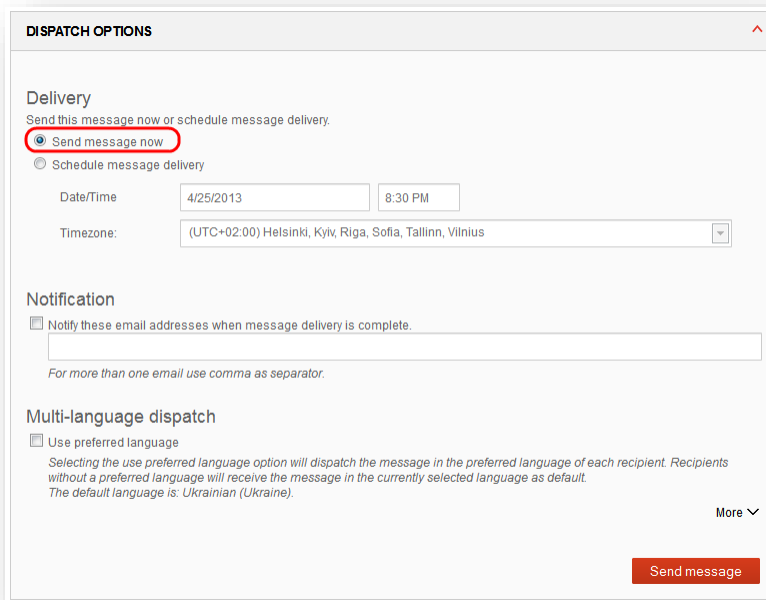
6.1.1 Sending a Message or a Subscription Message

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.



DISPATCH OPTIONS

Delivery
Send this message now or schedule message delivery.

Send message now

Schedule message delivery

Date/Time: 4/25/2013 8:30 PM

Timezone: (UTC+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius

Notification
 Notify these email addresses when message delivery is complete.

For more than one email use comma as separator.

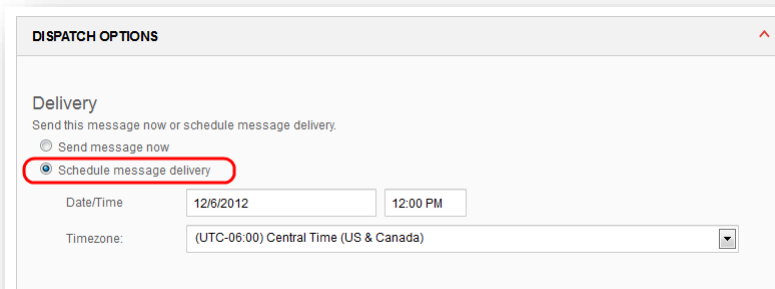
Multi-language dispatch
 Use preferred language

Selecting the use preferred language option will dispatch the message in the preferred language of each recipient. Recipients without a preferred language will receive the message in the currently selected language as default. The default language is: Ukrainian (Ukraine).

More ▾

Send message

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



DISPATCH OPTIONS

Delivery
Send this message now or schedule message delivery.

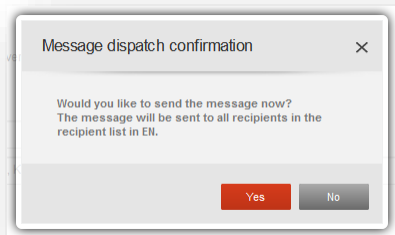
Send message now

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.
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:



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

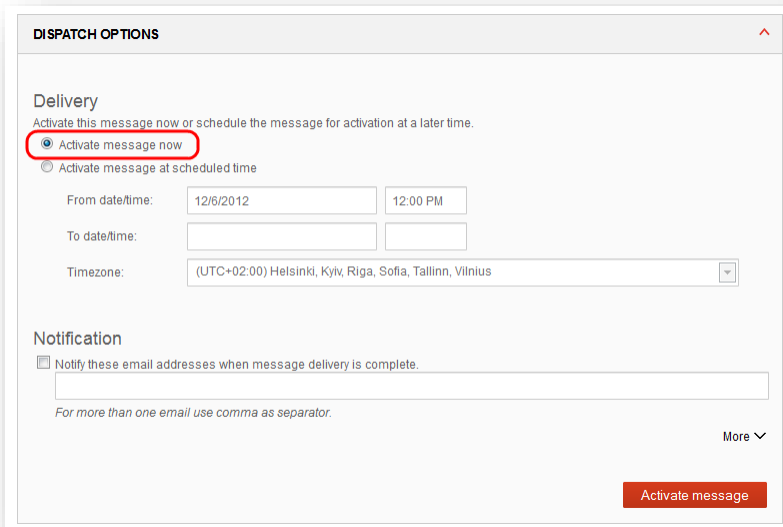
6.1.2 Sending a Triggered Message

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:

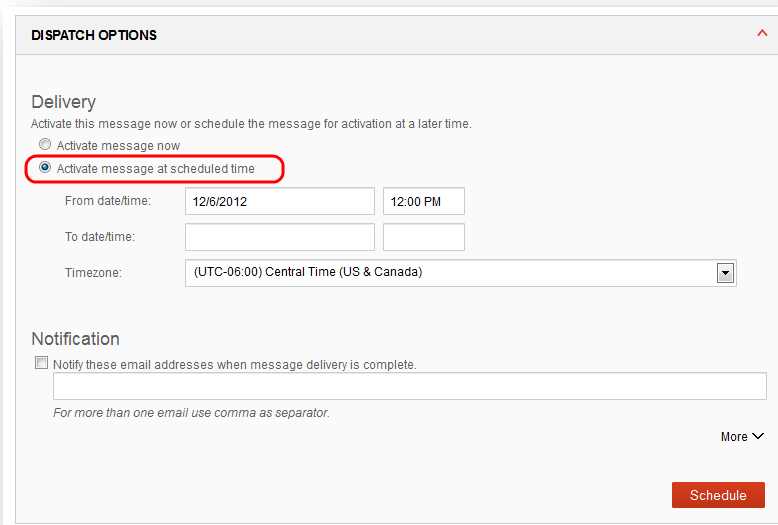
1. Create a new or select an existing triggered message.
2. Select the **Dispatch** tab.

- To activate a message immediately, select the **Activate message now** check box.



The screenshot shows the 'DISPATCH OPTIONS' dialog box. Under the 'Delivery' section, the 'Activate message now' radio button is selected and circled in red. The 'From date/time' field is set to '12/6/2012' and '12:00 PM'. The 'To date/time' field is empty. The 'Timezone' dropdown is set to '(UTC+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius'. Under the 'Notification' section, the checkbox 'Notify these email addresses when message delivery is complete.' is unchecked. A 'More' dropdown arrow is visible. At the bottom right, there is a red 'Activate message' button.

- To activate a message for a specific time period:
 - Select the **Activate message at scheduled time** check box.



The screenshot shows the 'DISPATCH OPTIONS' dialog box. Under the 'Delivery' section, the 'Activate message at scheduled time' radio button is selected and circled in red. The 'From date/time' field is set to '12/6/2012' and '12:00 PM'. The 'To date/time' field is empty. The 'Timezone' dropdown is set to '(UTC-06:00) Central Time (US & Canada)'. Under the 'Notification' section, the checkbox 'Notify these email addresses when message delivery is complete.' is unchecked. A 'More' dropdown arrow is visible. At the bottom right, there is a red 'Schedule' button.

- In the **From date/time** field, set the start of the period when you want the ECM to send a message.
 - 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.
 - In the **Timezone** field, select your time zone.
- 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

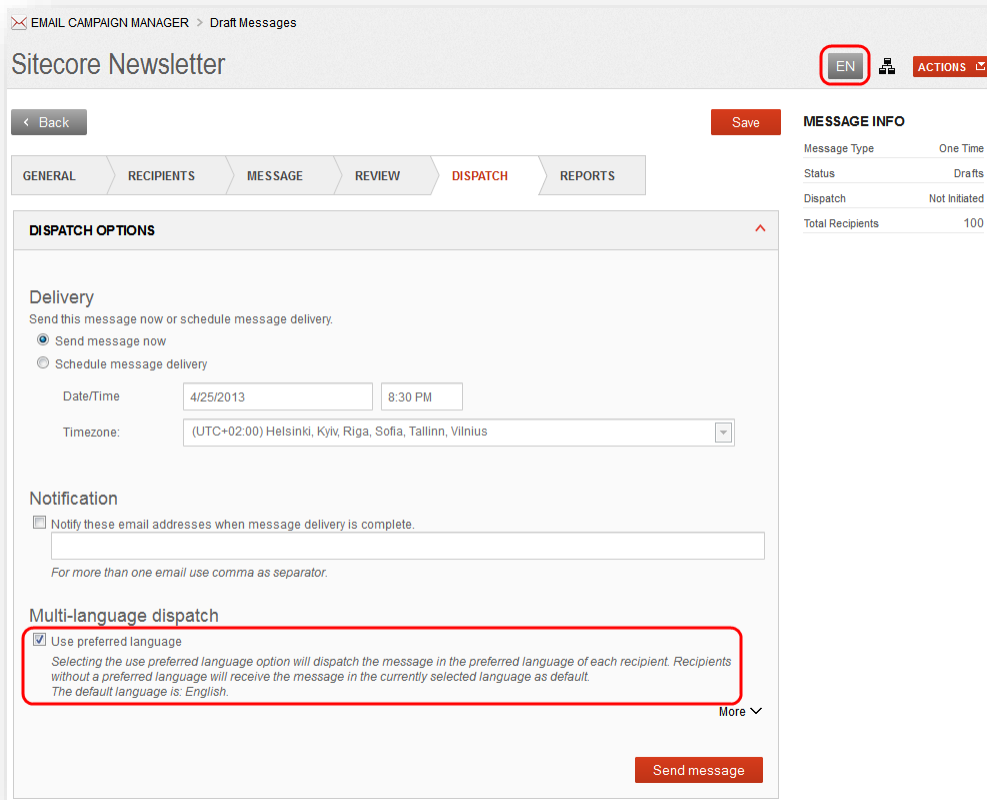
The Email Campaign Manager lets you create message versions in multiple languages. Starting from version 2.1, it also lets you deliver messages to recipients in their preferred language.

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**.



EMAIL CAMPAIGN MANAGER > Draft Messages

Sitecore Newsletter

EN ACTIONS

Save

MESSAGE INFO

Message Type	One Time
Status	Drafts
Dispatch	Not Initiated
Total Recipients	100

DISPATCH OPTIONS

Delivery

Send this message now or schedule message delivery.

Send message now

Schedule message delivery

Date/Time: 4/25/2013 8:30 PM

Timezone: (UTC+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius

Notification

Notify these email addresses when message delivery is complete.

For more than one email use comma as separator.

Multi-language dispatch

Use preferred language

Selecting the use preferred language option will dispatch the message in the preferred language of each recipient. Recipients without a preferred language will receive the message in the currently selected language as default. The default language is: English.

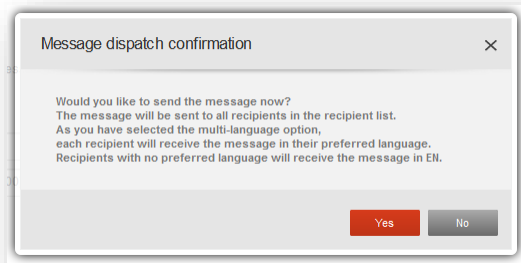
More

Send message

The **Message Language** button (EN) 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.

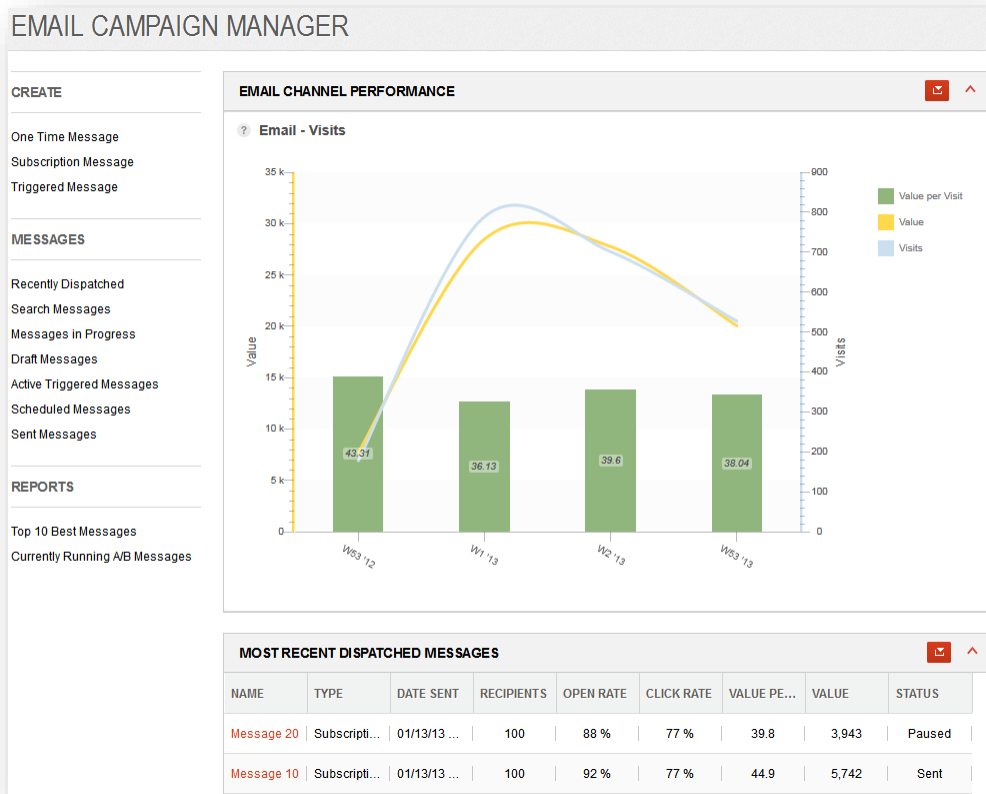
The message reports in **ECM** can be divided into three types:

- 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

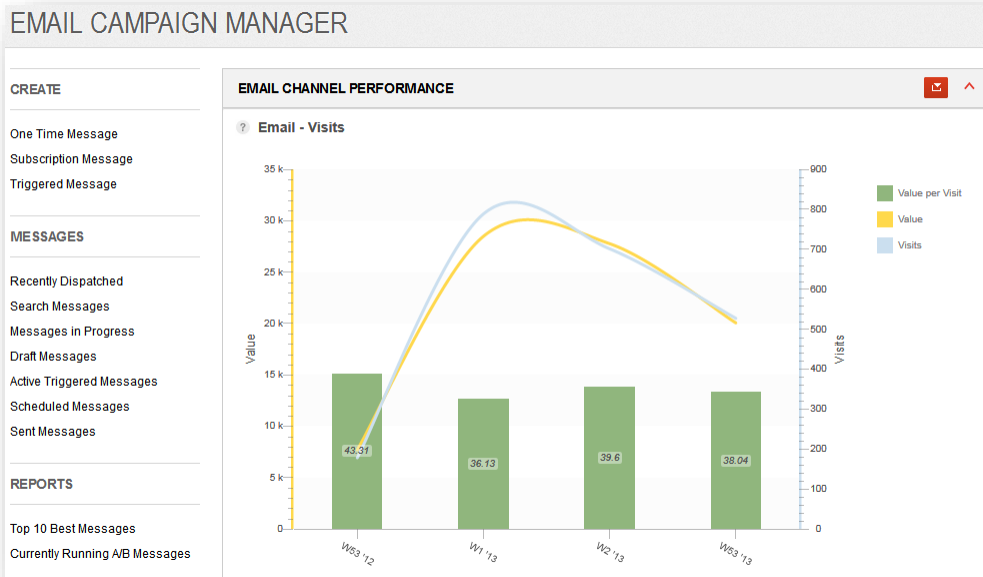
When you open the Email Campaign Manager, you see several sections that show the overall status of the Email Campaign channel.



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

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.



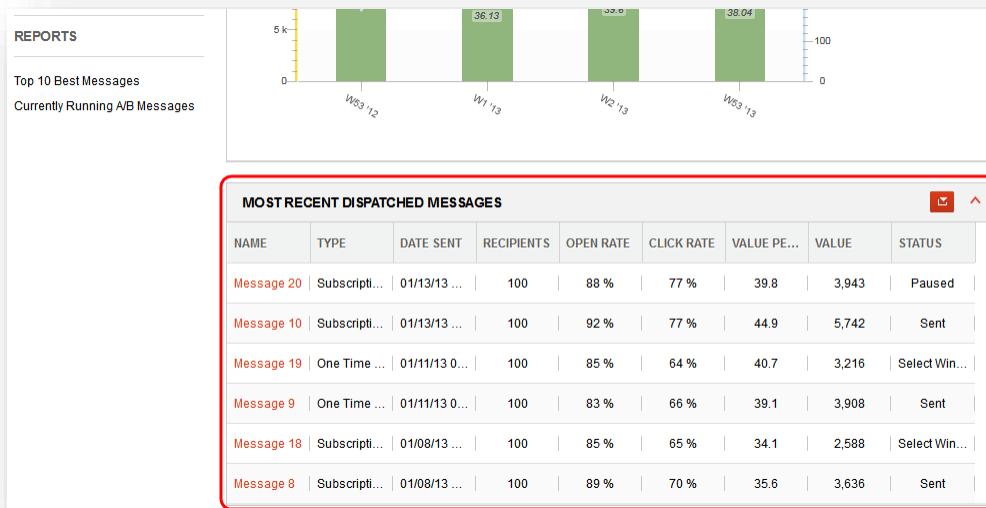
This chart contains the report for the Email Traffic Type for the past four weeks from the current date and contains the following values:

- **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.

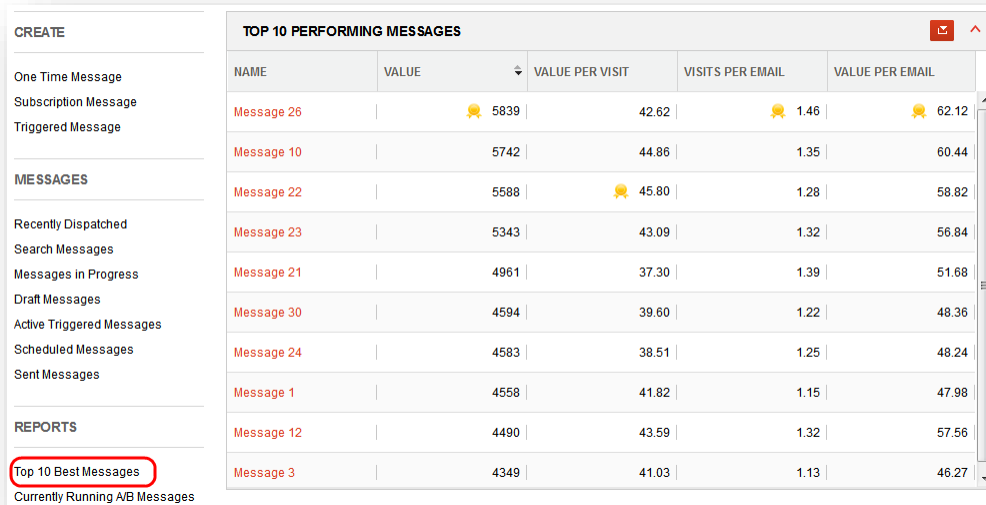
7.1.2 Most Recent Dispatched Messages

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.



7.1.3 Top 10 Best Messages

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



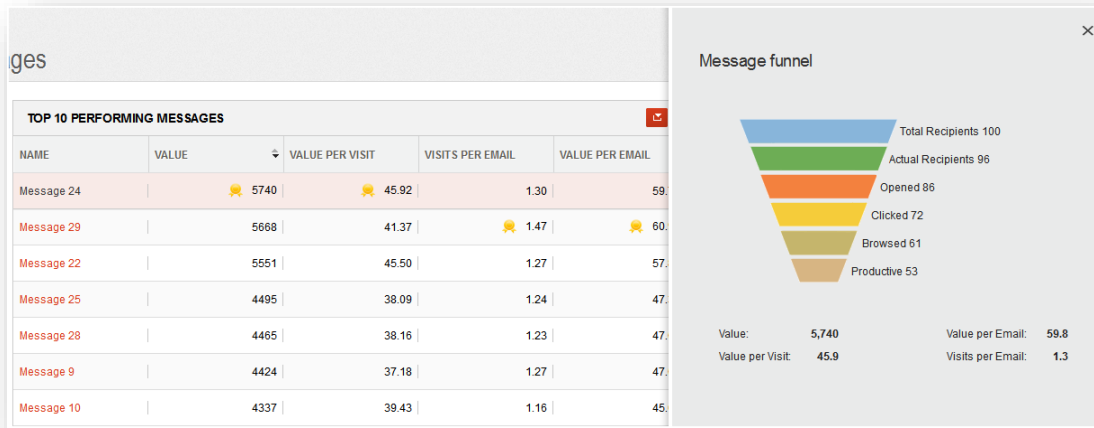
NAME	VALUE	VALUE PER VISIT	VISITS PER EMAIL	VALUE PER EMAIL
Message 26	5839	42.62	1.46	62.12
Message 10	5742	44.86	1.35	60.44
Message 22	5588	45.80	1.28	58.82
Message 23	5343	43.09	1.32	56.84
Message 21	4961	37.30	1.39	51.68
Message 30	4594	39.60	1.22	48.36
Message 24	4583	38.51	1.25	48.24
Message 1	4558	41.82	1.15	47.98
Message 12	4490	43.59	1.32	57.56
Message 3	4349	41.03	1.13	46.27


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

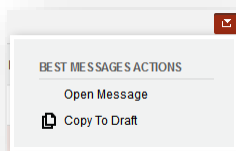
- Value.
- Value per Visit.
- Visits per Email.

- Value per Email.

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



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 RUNNING A/B MESSAGES			
One Time Message		NAME	CURRENTLY WINNING	VALUE	SENT
Subscription Message		Message 30	B	1,677	01/13/13 19:00
Triggered Message		Message 19	C	1,131	01/10/13 23:47
MESSAGES		Message 18	B	911	01/08/13 04:35
Recently Dispatched		Message 27	A	1,232	01/05/13 09:24
Search Messages		Message 16	C	1,257	01/02/13 14:11
Messages in Progress		Message 15	B	1,377	12/30/12 18:59
Draft Messages		Message 24	A	1,694	12/27/12 23:48
Active Triggered Messages		Message 13	A	1,305	12/25/12 04:35
Scheduled Messages		Message 12	A	1,606	12/22/12 09:23
Sent Messages		Message 21	C	1,865	12/19/12 14:12
REPORTS					
Top 10 Best Messages					
Currently Running A/B Messages					

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

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

A/B Messages		CURRENTLY RUNNING A/B MESSAGES			
		NAME	CURRENTLY WINNING	VALUE	SENT
		Message 30	B	1,376	12/05/12 14:04
		Message 19	A	1,325	12/02/12 18:52
		Message 18	B	1,242	11/29/12 23:40
		Message 27	A	1,652	11/27/12 04:28
		Message 16	A	1,131	11/24/12 09:16
		Message 15	B	1,148	11/21/12 14:04
		Message 24	B	2,114	11/18/12 18:52
		Message 13	A	1,163	11/15/12 23:40

A/B TEST RESULT			
VARIANT	VALUE	OPEN RATE	
A	1,814	91 %	
B	2,114	88 %	
C	1,812	91 %	

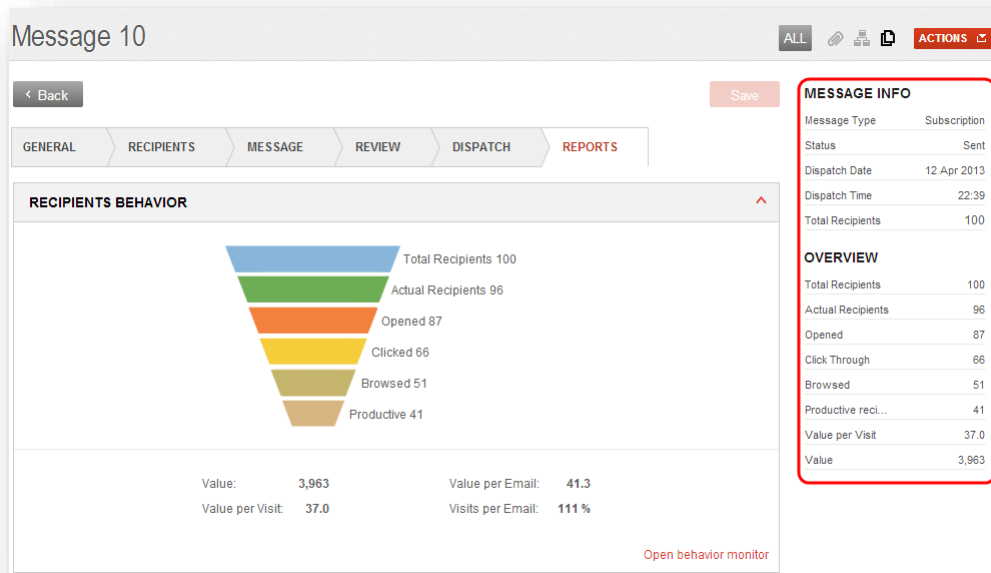
In this dialog box, you can see how specific variant perform.

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.



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.

Message 10

EN [Icons] ACTIONS

Save

GENERAL RECIPIENTS MESSAGE REVIEW DISPATCH **REPORTS**

RECIPIENTS BEHAVIOR

Total Recipients	50
Actual Recipients	48
Opened	43
Clicked	34
Browsed	27
Productive	21

Value: 2,089 Value per Email: 43.5
 Value per Visit: 38.0 Visits per Email: 115 %

Open behavior monitor

MESSAGE INFO

Message Type	Subscription
Status	Sent
Dispatch Date	12 Apr 2013
Dispatch Time	22:39
Total Recipients	100

OVERVIEW

Total Recipients	100
Actual Recipients	96
Opened	87
Click Through	66
Browsed	51
Productive reci...	41
Value per Visit	37.0
Value	3,963

7.2.2 The Reports Tab

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

Message 10

ALL [Icons] ACTIONS

Save

GENERAL RECIPIENTS MESSAGE REVIEW DISPATCH **REPORTS**

RECIPIENTS BEHAVIOR

Total Recipients	100
Actual Recipients	96
Opened	87
Clicked	66
Browsed	51
Productive	41

Value: 3,963 Value per Email: 41.3
 Value per Visit: 37.0 Visits per Email: 111 %

Open behavior monitor

MESSAGE INFO

Message Type	Subscription
Status	Sent
Dispatch Date	12 Apr 2013
Dispatch Time	22:39
Total Recipients	100

OVERVIEW

Total Recipients	100
Actual Recipients	96
Opened	87
Click Through	66
Browsed	51
Productive reci...	41
Value per Visit	37.0
Value	3,963

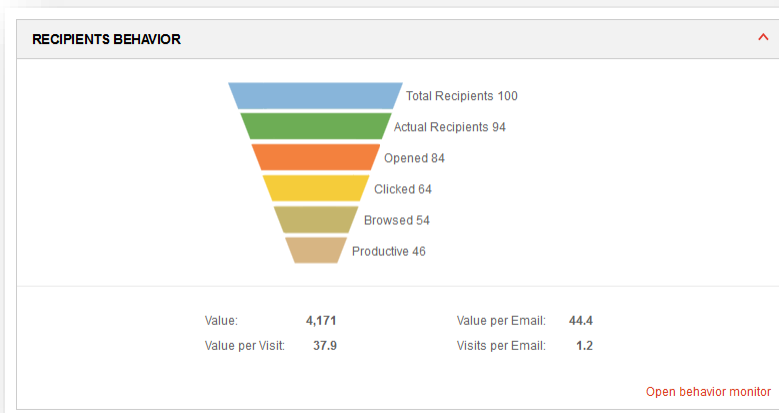
MESSAGE PERFORMANCE

Message 10 - Visits

This tab contains the following sections.

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.



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.

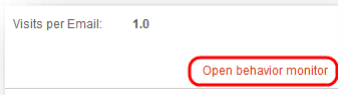
If you subtract the **Browsed** value from **Clicked** value, you will get the number of visitors, who came to the website via the link in the message, and went away without viewing any other pages. Such visitors are called page bounced visitors and their number lets you evaluate how effective and relevant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

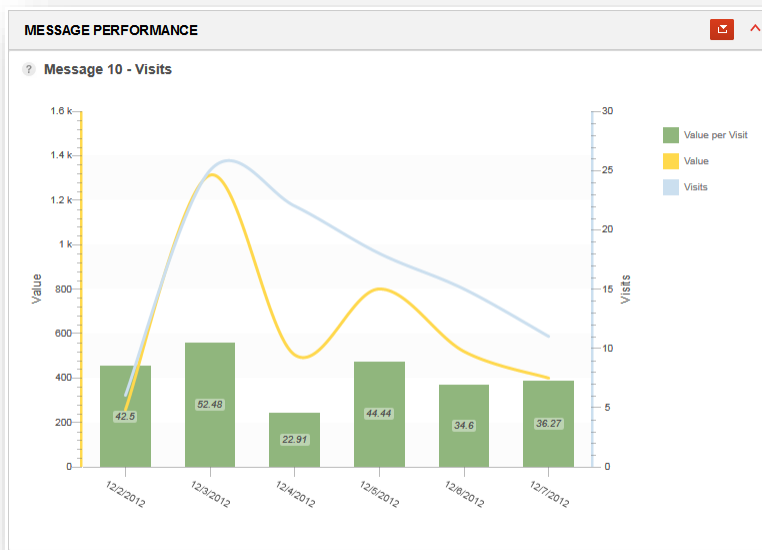
You can get a better overview of the recipients' behavior if you open the **Engagement Plan Monitor**. You can do this by clicking the **Open behavior monitor** link:



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. From this report you can see the best performing landing pages, which enables you to improve your communication with the

recipients.

BEST EMAIL LANDING PAGES	
PERFORMANCE INDICATOR	LANDING PAGE
Most 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:

BEST EMAIL LANDING PAGES	
PERFORMANCE INDICATOR	LANDING PAGE
Most Relevant Experience	/PageG.aspx
Most Valuable	/PageE.aspx
Most Attention	/PageE.aspx
Most Visited	/PageE.aspx
Most Potential	/PageB.aspx

LANDING PAGES VALUE PER VISIT	
LANDING PAGE	VALUE PER VISIT
/PageG.aspx	59.35
/PageC.aspx	53.67
/PageF.aspx	44.46
/PageD.aspx	44.40
/PageE.aspx	44.19
/PageB.aspx	43.06
/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.

EMAIL LANDING PAGES PERFORMANCE						
LANDING PAGE	POTENTIAL	PAGE BOUNCE	VALUE	VALUE PER VISIT	CLICKS	
/PageE.aspx	1.0 %	4.00	1,414.00	44.19	32.00	
/PageG.aspx	-5.4 %	2.00	1,365.00	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	

Potential Value

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

EMAIL LANDING PAGES PERFORMANCE						
LANDING PAGE	POTENTIAL	PAGE BOUNCE	VALUE	VALUE PER VISIT	CLICKS	
/PageE.aspx	1.0 %	4.00	1,414.00	44.19	32.00	
/PageG.aspx	-5.4 %	2.00	1,365.00	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:

$$\text{Potential Value gain} = (\text{Average Value per Visit} - \text{Value per Visit}) \times \text{Number of related Visits.}$$

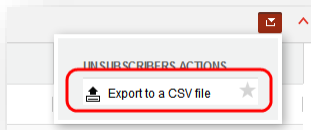
$$\text{Potential} = \text{Potential value gain} * 100 / \text{Sum (Value for all Visits).}$$

Opted Out Details

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

UNSUBSCRIBED DETAILS		
EMAIL	FULL NAME	UNSUBSCRIBED DATE
user73@xxx.xx	Recipient	12/10/12 09:16
user72@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.

EMAIL BOUNCES DETAILS			
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.

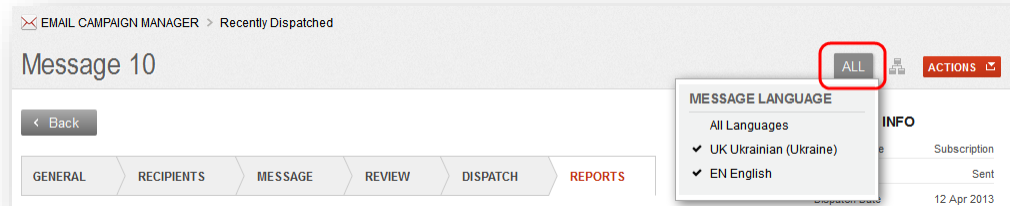
MESSAGE PERFORMANCE PER LANGUAGE					
LANGUAGE	RECIPIENTS	OPEN RATE	CLICK RATE	VALUE	VALUE PER VISIT
Ukrainian (Ukraine)	50	92 %	67 %	1,874	36.0
English	50	90 %	71 %	2,089	38.0

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.

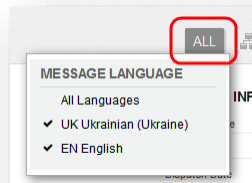
To view reports for message versions in specific languages:

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

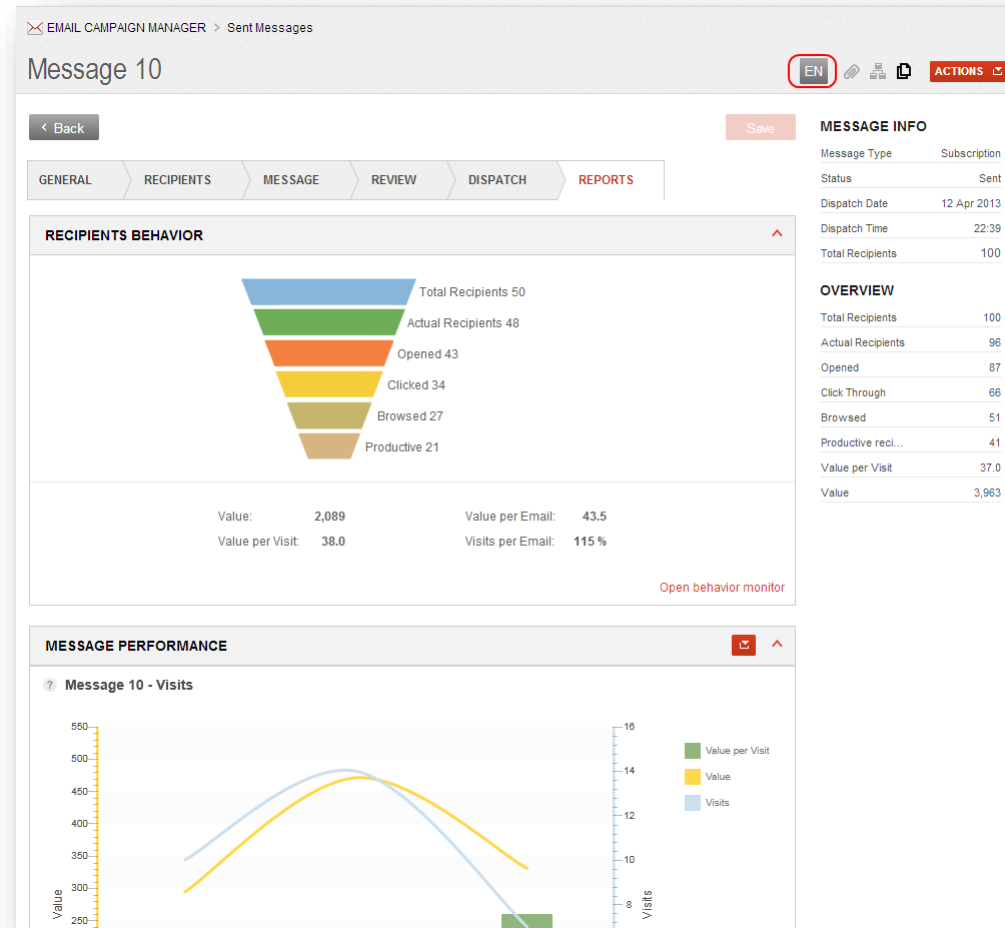


ECM displays the language versions that are available in the message. You can filter reports using language versions that were sent previously.

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.

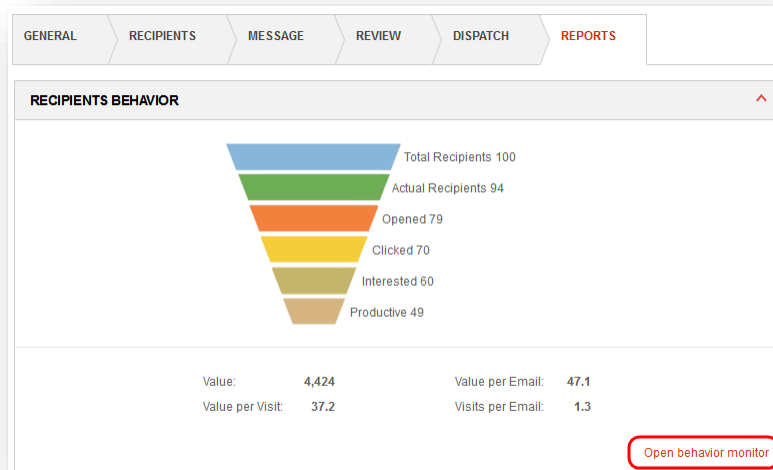


7.3 Marketing Automation Monitor

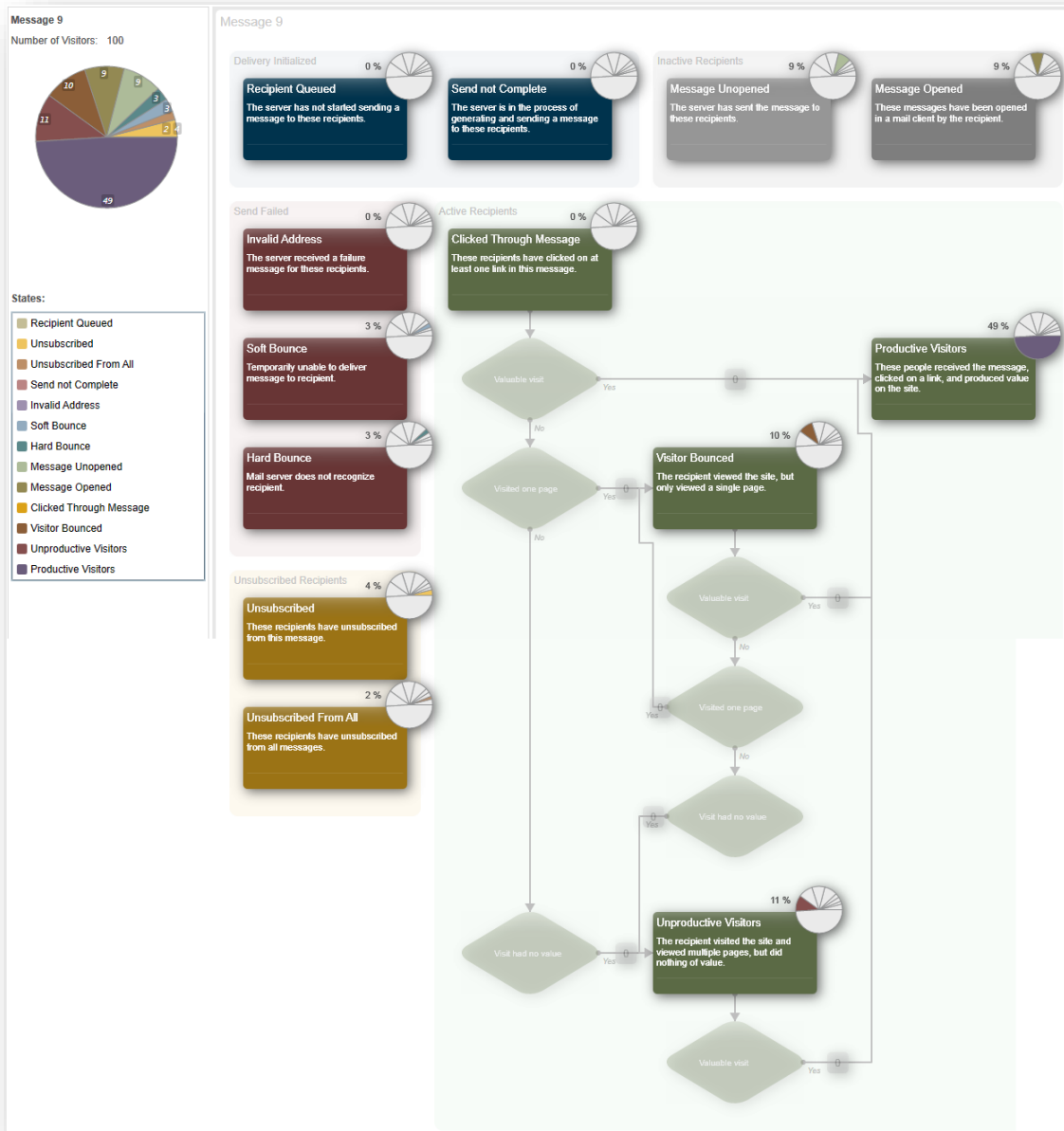
The **ECM** uses the Marketing Automation Monitor to manage the sending process and track the behavior of the recipients of the message.

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**.



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*.

- **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.

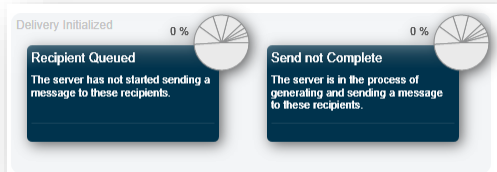
- **Active Recipients**

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.



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*.

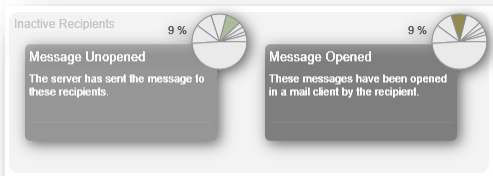
If a recipient appears in the **Hard Bounce** state, the module stops sending messages to this recipient from any target audience. If such recipient clicks a link in a message that has been sent to them eventually, then the module moves this recipient to the **Clicked Through Message** state.

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.

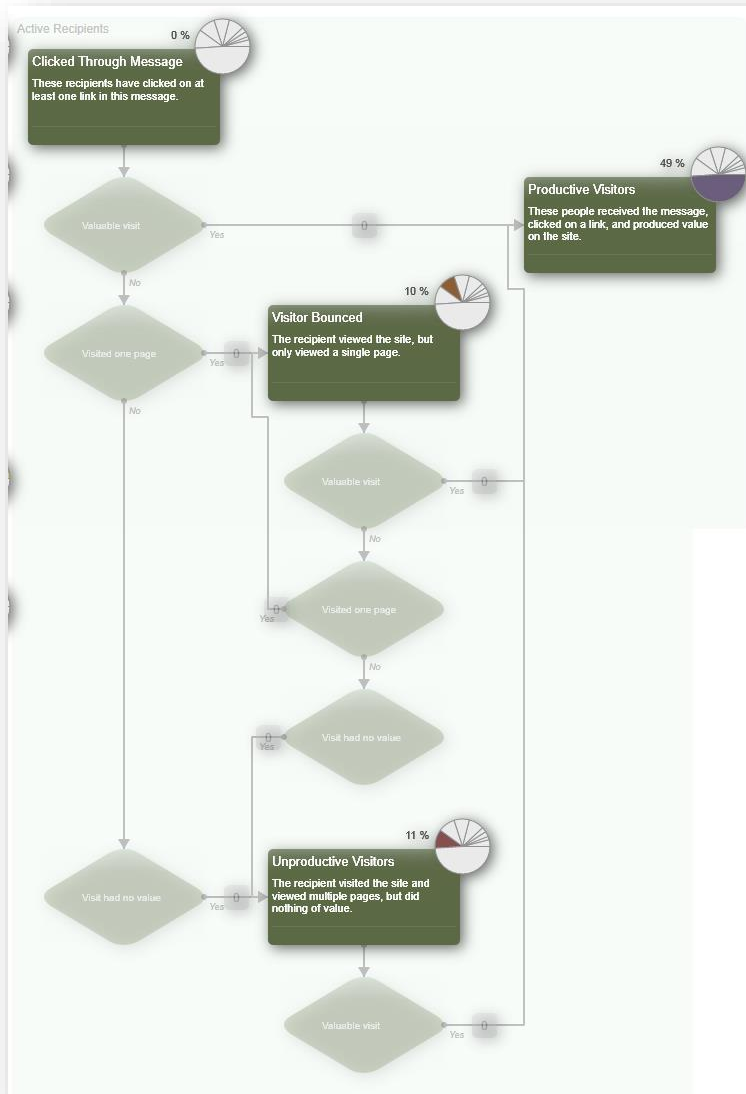
Message Opened

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.

- **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.

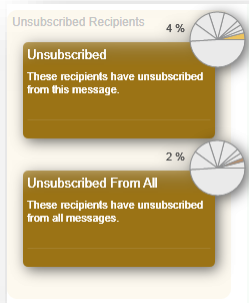
Productive Visitors

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.