

EPiSERVER MAIL

Version 5 R2



User Guide

EPiSERVER

User's Guide for EPiServer Mail 5 R2
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About EPiServer Mail

E-mail communication is becoming increasingly important. As part of the digital marketing communication mix, EPiServer Mail is one of the best tools for communicating with your target audience and engaging them in a dialogue. E-mail communication is fast, cost-efficient and enables you to distribute personalized content to your audience.

A well-designed e-mail must be easy to create and distribute. When properly used, e-mail communication enables you to convey selected topics to your audience and create demand, increase brand awareness, generate sales opportunities and drive traffic to your web site. It is also an efficient tool for internal information. For e-mails to create the desired results, the communication must be developed directly for the target audience.

With EPiServer Mail you can easily handle small, targeted e-mail campaigns or larger mailings. You can send the e-mails to an unlimited number of recipients, personalize the mailings and schedule when the mailing should be executed. This enables you to build powerful information or marketing campaigns.

Main Functionality

With EPiServer Mail you can deploy an e-mail communication initiative from any location: All you need is Internet access. One of the main advantages of EPiServer Mail is that you create your e-mails directly from your EPiServer CMS environment which is already in place for your external website, **intranet**¹, **extranet**² or your EPiServer community. This way content is only produced once and reused in multiple channels, saving time and resources, and improving quality. It also ensures that traffic is driven to the website.

EPiServer Mail have the following features:

- Fast creation of mailings and other recurring e-mail communication efforts
- Send any Internet page to multiple recipients
- Send mailings to an unlimited number of recipients
- Detailed statistical data in real-time
- An unlimited number of recipient lists

The Way EPiServer Mail Works

EPiServer Mail is a powerful software for distribution of e-mails and newsletters. It is built to handle very large numbers of e-mails or newsletters and consists of a client part (EPiServer Mail Editor) and a server part (EPiServer Mail Service). The client part is described in this user guide.

In the client part, the message is created and the distribution is set and initiated. Then there is an order e-mail with advanced metadata sent to the dedicated EPiServer Mail mass distribution servers. The servers distribute the e-mails and newsletters without disturbing or absorbing important power from the sender's IT environment. Real-time statistics for each distribution is available instantly.

¹A network based on the same technology as the World Wide Web and that works in the same way, but which is only accessible to the employees of a company or organization. Compare with Extranet.

²An extended version of an intranet. It uses the same technology as the World Wide Web, but only permits a small number of users. An extranet is not only accessible to the employees of a company, but also to external parties cooperating with the company, such as subcontractors and retailers.

About this Documentation

This documentation is intended for **users**¹ of EPiServer Mail, to create mailings and handling statistics.

How to Access EPiServer Help System

You can access the web help from the EPiServer OnlineCenter menu (which is always visible at the top), click the ? icon and select the system for which you want to view the help. Browse or search for the topic where you need guidance.



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

You can also access the web help by browsing to webhelp.episerver.com.

Expected Knowledge

As a reader of this documentation, you are assumed to have good understanding of the following:

- The standard Windows environment
- Basic word processing skills (no specific web publishing or **HTML**² knowledge is needed)
- Web editing in EPiServer CMS

References

The following parts are listed as references and will not be described in this documentation:

- Web editing, how to use EPiServer CMS and Live Monitor, see EPiServer CMS Editor's Manual

Online Community on EPiServer World

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

Copyright Notice

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¹The number of unique work stations that visited this page/URL during specified period. Cookie-based identification.

²Hypertext Markup Language. The language often used to write web pages. The layout of the text and the page as well as the links are specified by simple codes that are invisible to the user when the page is viewed in a web browser. There is a standard for the way HTML should be written, although different web browsers sometimes interpret the language differently.

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Getting Started with EPiServer Mail

When you have successfully installed EPiServer Mail, log in to EPiServer CMS in Edit mode and click **Mail** in the top menu. The main view consists of the following menu options:

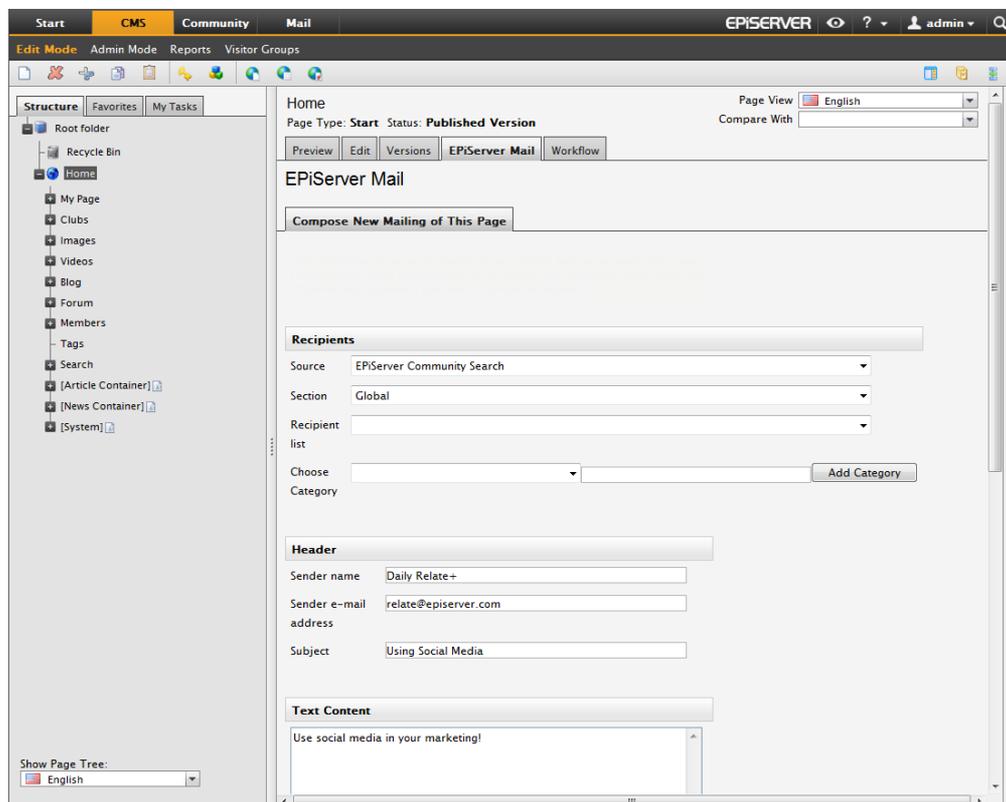
- **New Mailing.** Select to create and initiate the distribution of newsletters or e-mails to your target group.
- **Sent Mailings.** Select to view sent mailings. Statistics and results from each mailing are also displayed here.
- **Manage Recipients.** Select to select and import lists of recipients.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

How to Access EPiServer Mail in EPiServer CMS

EPiServer Mail is closely integrated with EPiServer CMS, it will also be available as an **EPiServer Mail** tab on each page of your website. This means that you can easily create mailings from any of the EPiServer CMS pages on your website.

Creating mailings directly from an EPiServer CMS page works the same way as when using **Mail** in the top menu. You will find sections for entering recipients information, mailing category, header information with attributes, text content, advanced settings and the preview and sending section.

When you have sent the mailing you will receive a confirmation message. Each page also has a **Message History** tab, where you can see an overview of the mailing statistics for that particular page.



Sending a New Mailing

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

Mailing Settings Tab

1. In the **Recipients** group box, select where the recipient list should come from (the source) and which recipient list to use. Read more about this under **Manage Recipients**.
2. You also select which **Section** the mailing should be created for. A Section is a way to control the access rights for **users**¹ to different recipient lists. New sections can be created by clicking **Manage Sections** from the left pane. Read more about section under **Manage Sections**.
3. You also need to choose a **Category** for your mailings. You can create and add categories, for instance “Weekly Newsletter”, for your mailings. This information is used when unsubscribing to a mailing. Read more about this under **Unsubscribe to Mailings**.
4. The predefined information in the **Header** group box can be changed before sending a mailing. Enter a subject for the mailing in the **Subject** field. The information entered in these fields is displayed for the recipients when they receive the e-mail.
5. Based on the information in the recipient lists, you can select one or more of the following attributes from the **Attributes** list in the **Subject** field:
 - **E-mail address**. Shows the recipient’s e-mail address in the subject field.
 - **Unsubscribe URL**². Shows an unsubscribe link in the subject field.
 - **Recipient ID**. Shows the recipient’s ID in the subject field.
 - **Firstname**. Shows the recipient’s first name in the subject field.
 - **Lastname**. Shows the recipient’s last name in the subject field.

Attributes are available for adding either in the subject field, or in the **HTML**³ editor. If you want to add the unsubscribe URL option directly in an EPiServer CMS page (for instance a newsletter template), the unsubscribe link must be added in that specific page template.

¹The number of unique work stations that visited this page/URL during specified period. Cookie-based identification.

²Uniform Resource Locator. Also known as a web address. HTTP stands for Hypertext Transfer Protocol. The HTTP must be included in the web address when creating a link from one web page to another.

³Hypertext Markup Language. The language often used to write web pages. The layout of the text and the page as well as the links are specified by simple codes that are invisible to the user when the page is viewed in a web browser. There is a standard for the way HTML should be written, although different web browsers sometimes interpret the language differently.



The **Optimize for spam filters** check box allows you to select whether you want to sacrifice some statistics collection to avoid having your newsletter classified as spam.

6. Select the **Add parameters to redirected links** check box if you want the information about which recipients have clicked on the links to be sent.
7. The **Remove active content tags** check box allows you to select whether you want EPiServer Mail to remove any SCRIPT, APPLET, OBJECT, EMBED and FORM tags in the HTML content. This also removes on-mouse-over and similar attributes from other tags. This function can be convenient for instance if using a page published on a web site, where the page template contains these types of tags.
8. Continue with the creation of the mailing by clicking the **HTML Content tab**.

HTML Content Tab

You can choose from the following options to send mailings to your recipients:

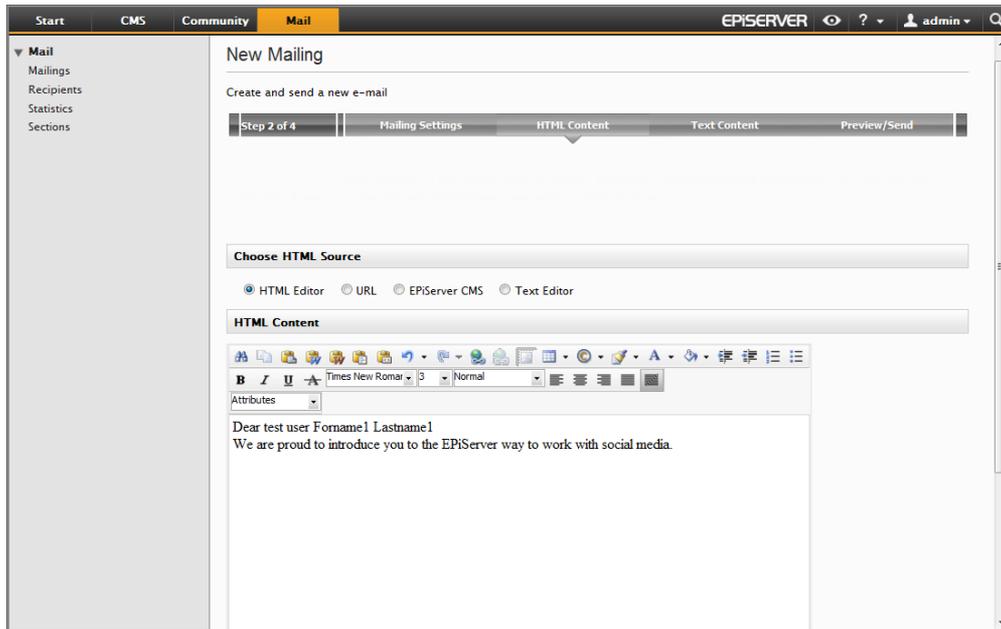
HTML Editor

When you create a mailing that contains HTML text, it is possible to enter variables in the HTML editor that personalize the message, for example, to have every recipient name automatically pasted into each distributed message.

EPiServer Mail supports use of up to 20 variables. Enter a variable into your mailing by selecting the appropriate attribute from the **Attributes** drop-down list.

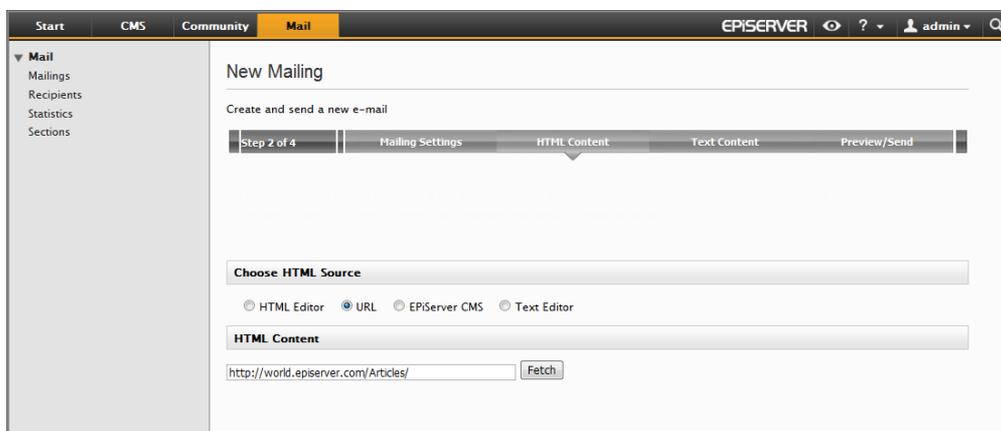


The HTML editor is an easy way to create an HTML message. However, to ensure that all tags and formatting remain in the final output as intended, it may better to use the Text Editor.



URL

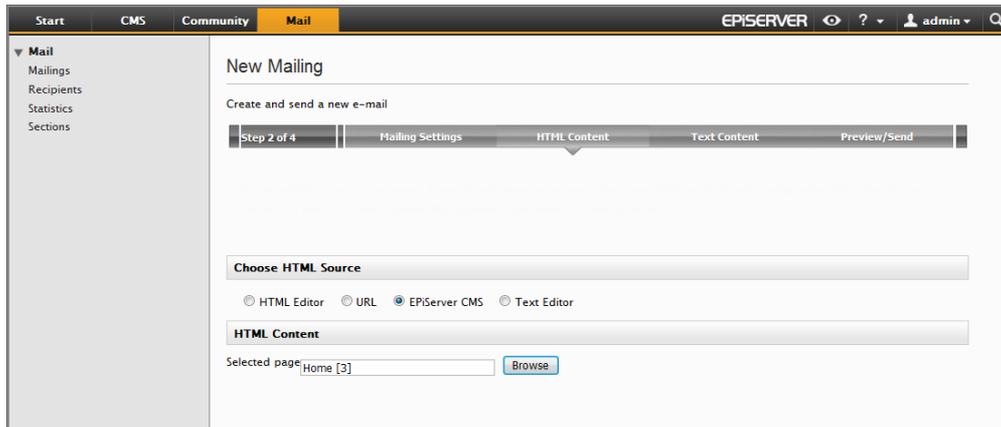
1. Select **URL** in the **Choose HTML Source** section.
2. Enter a specific web address for the content by selecting the URL button and entering the appropriate URL. Click **Fetch** to make sure that the URL you request is available with content.



EPiServer CMS

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

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



Text Editor

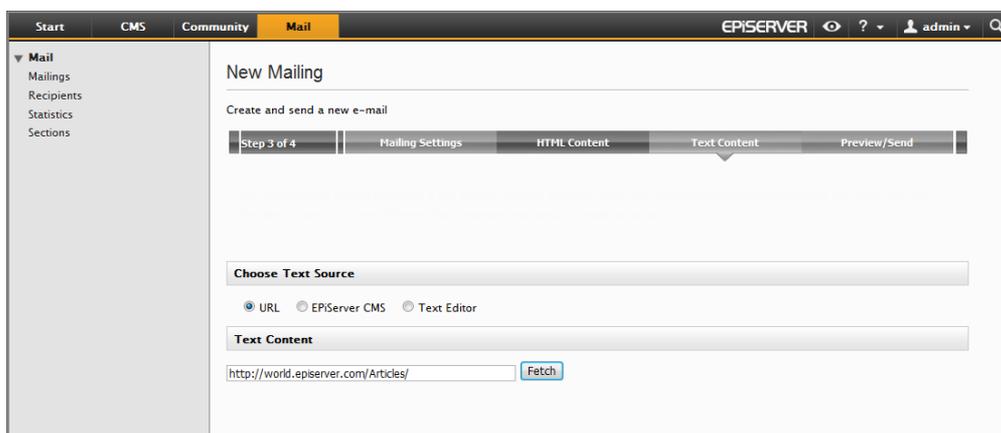
Select **Text Editor** in the **Choose HTML Source** section and enter the text that you want to be included in the mailing.

Text Content Tab

In the **Text Content** tab you enter the text that you want to be displayed for the recipients if their e-mail clients do not support HTML. You can select to either write the message in a text editor, select to send an EPiServer CMS page or to send a URL that is automatically shown if the recipients e-mail client does not support HTML.

URL

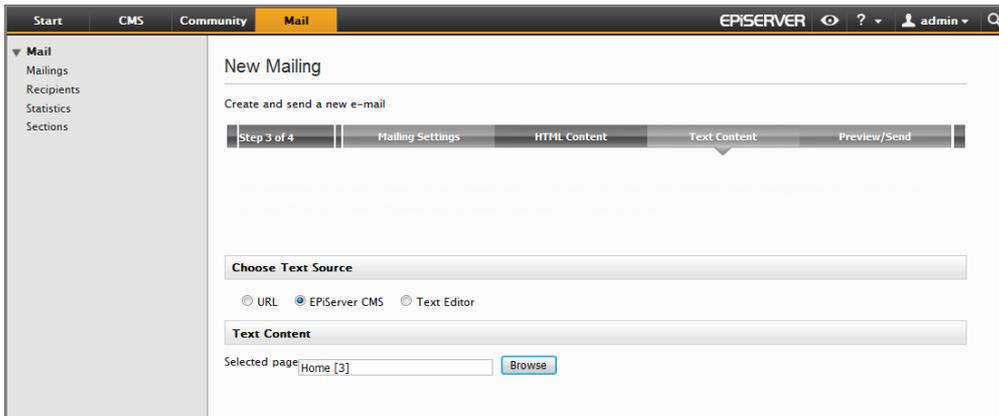
1. Select **URL** in the **Choose Text Source** section.
2. Enter a specific web address for the content by selecting the **URL** button and entering the appropriate URL. Click **Fetch** to make sure that you URL you request is available with content.



EPiServer CMS

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

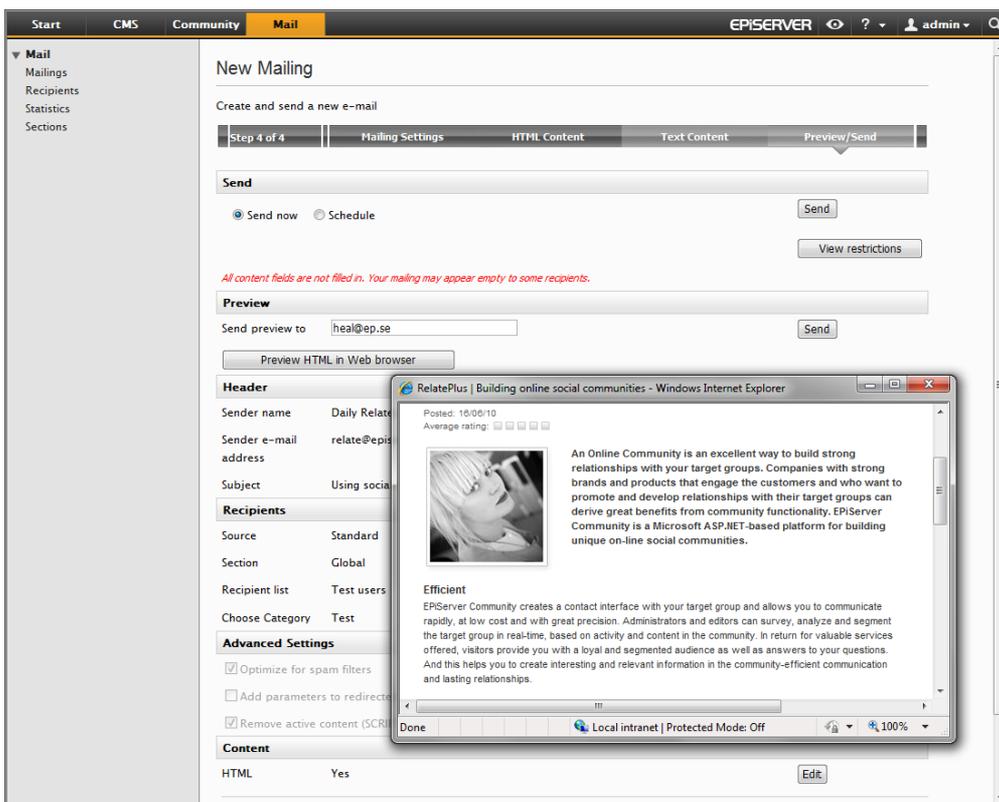
1. Select **EPiServer CMS** in the **Choose Text Source** section.
2. Click **Browse** and browse to the page that contains the content to be used in the newsletter.



Text Editor

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

Preview/Send Tab



In the **Preview/Send** tab you can view the message content and all settings before actually sending or scheduling to send your message as follows:

1. Select when you want to send the mailing in the **Send section**. Select **Send now** if you want the mailing to be sent immediately. Click **Schedule** and select day and time from the calendar to schedule when the message is to be sent. This feature is convenient when you want the mailing to be sent when you are not able to send the message yourself, such as during holidays or special events.
2. Click **View restrictions** to view the mailing restrictions on the EPiServer Mail account.
3. Preview the HTML content in your web browser by clicking **Preview HTML in web browser**.



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

4. Edit any content of the tabs in the mailing by clicking **Edit**.
5. When you are done, click **Send** in the **Send section**.
6. After sending your message, you get a confirmation that your mailing has been sent. You can choose to go back to your current message, send a new message or choose any of the options in the main menu.

Reviewing Sent Mailings

All statistics for sent mailings in EPiServer Mail are saved and it is possible to look at them in real time and see, for example, how many recipients have read the e-mail or how many have clicked on a particular link.



Note that if you remove a recipient list, the statistics for the mail will stop the gathering of information for that mailing.

The sent mailings view has a search interface, where you can search by section, recipient list, subject and the date when the message was sent.

The clock icon indicates that a message has been scheduled to be sent. Hold the cursor over the icon to see the scheduled date and time for the mailing.

Mailing Statistics

Click the name of one of the listed mailings to open the **Mailing Statistics** window, which consists of the following tabs:

Link Report Tab

The **Link Report** tab allows link statistics to be visualized with markers showing how many clicks have been made to each link. Click **Show/Hide Link Statistics** to show and hide the link statistics for the mailing.

It is also possible to export a list of who has clicked which links as a file. Click **Export Clicks** and select to open or save the file.

The screenshot shows the 'Mailing Statistics' window in Internet Explorer. At the top, there are three tabs: 'Link Report', 'Delivery Report', and 'Unsubscription Report'. Below the tabs are two buttons: 'Show/Hide Link Statistics' and 'Export Clicks'. The main content area displays a banner for 'EPiServer RELATE+' with '0 clicks' and a 'Sign up and login!' button. Below the banner is a navigation menu with items: 'Home', 'my page', 'links', 'images', 'videos', 'blog', 'forum', 'members', 'tags', each with a click count. A search bar is also present. The main content area features an article titled 'Building online social communities' posted on 16/06/10. The article includes a photo of a woman and text describing the benefits of online communities. The text is divided into sections: 'Efficient' and 'Flexible'.

Delivery Report Tab

The **Delivery Report** tab shows pie charts and graphs visualizing the most important statistics, as well as options to export lists of the people who have opened the message and the addresses that bounced it.

Export information on opened and bounced messages by clicking **Export Opened** or **Export Bounced** and selecting to open or save the file.

Unsubscription Report

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

Managing Recipients

Recipient lists can be imported and exported from and to external applications. All recipient lists are displayed as shown below with information about list creation date and the number of recipients it contains. The **Standard** source is for sources imported from text or XML files into EPiServer Mail. Other sources, such as EPiServer Community or EPiServer CMS, may be available depending on your installation.

View and manage recipients for your mailings

Select Recipient Source

Source: Standard
Section: Global

Import Recipient Lists

Name of list: Testusers
Import File (.xml or .txt): C:\Users\heal\Desktop\Mail_recip

The recipient list has been successfully uploaded.

Name	Created	Recipients	Notifications	Download	Remove
Testusers	Today 4:59 PM	15			

Importing Standard Recipient List

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

CSV files

The most common way to import e-mail lists is from Microsoft Excel. When you import e-mail addresses from Microsoft Excel, the file needs to be saved in a specific format.

The first row is a header row and is not imported into EPiServer Mail. The first column is always used as the e-mail address. It is possible to import a list that consists of only one column with e-mail addresses. In the example above, there are additional columns with variables such as first name, last name and title. These variables can be used for different needs and are used to personalize each e-mail sent from EPiServer Mail, it handles up to 20 variables for each recipient list.

For further information about designing your own personalized messages, see the Developer's Guide for EPiServer Mail on EPiServer World.

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

Save the Excel sheet as a .csv file (semi-colon delimited) and make sure that the file has the format **UTF-8**¹. If it is not possible to make sure that the .csv file is in UTF-8 format, open the file with a regular text editor, such as Notepad, and save the file again making sure that the file is in UTF-8 format.

Handling Bouncing Messages

The EPiServer Mail server collects information about e-mails that bounce. The information is delivered with Web Services (a non-EPiServer specific integration method) to the sender. It is up to the sender to decide action on e-mail addresses that bounce. For example, if an address bounces more than two times it can be removed from that specific recipients list.

Unsubscribing to Mailings

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

1. The recipient can choose to unsubscribe only to a mailing of a certain category, for instance a weekly newsletter. The recipient will be excluded from all further mailings of this category.
2. The recipient can also choose to unsubscribe to all mailings from this particular EPiServer Mail sender installation. The recipient will not receive any future mailings from this site.

When the recipient clicks on the unsubscribe link in the mailing, the unsubscribe option page will be displayed. The recipient can then choose either option to unsubscribe.



If you want to add the unsubscribe **URL**² option directly in an EPiServer CMS page (for instance a newsletter template), the unsubscribe link must be added in that page template

¹Unicode Transformation Format-8. It is an octet (8-bit) lossless encoding of the Unicode character set. UTF-8 is the default encoding for XML.

²Uniform Resource Locator. Also known as a web address. HTTP stands for Hypertext Transfer Protocol. The HTTP must be included in the web address when creating a link from one web page to another.

Unsubscribe from mailing

You have reached this page by clicking on an unsubscription link in a mailing you would like to be excluded from in the future. Here below you have two options; being unsubscribed from a mailing category or from all future mailings from this site. Unsubscribing from the category will exclude you from all future mailings from that specific category, but not from other mailings from this site that might still be interesting to you. If you know that you will not be interested in any mailings from this site in the future, you can choose the second option.

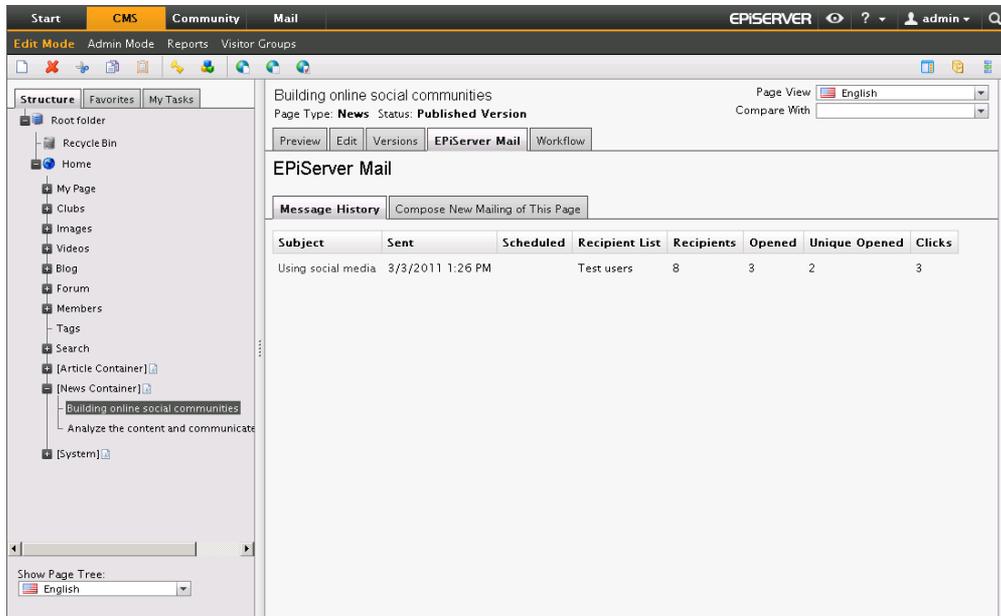
- Unsubscribe me from the mailing category Monthly Tech News**
Choose this option if you want to unsubscribe from the mailing category.
- Unsubscribe me from all mailings from the global site**
Choose this option if you want to unsubscribe from all mailings from the site.

Handling Message Statistics

In the integrated EPiServer CMS and Mail, you will have a statistic feature which provides an overview of message statistics for sub-pages to a parent page. The statistics are presented graphically and provides a number of different views. Here you can also create a new mailing based on the same page.

The statistics overview consists of the following tabs by entering a page of the type **NewsLetter**, click the **EPiServer Mail** tab:

Message History Tab

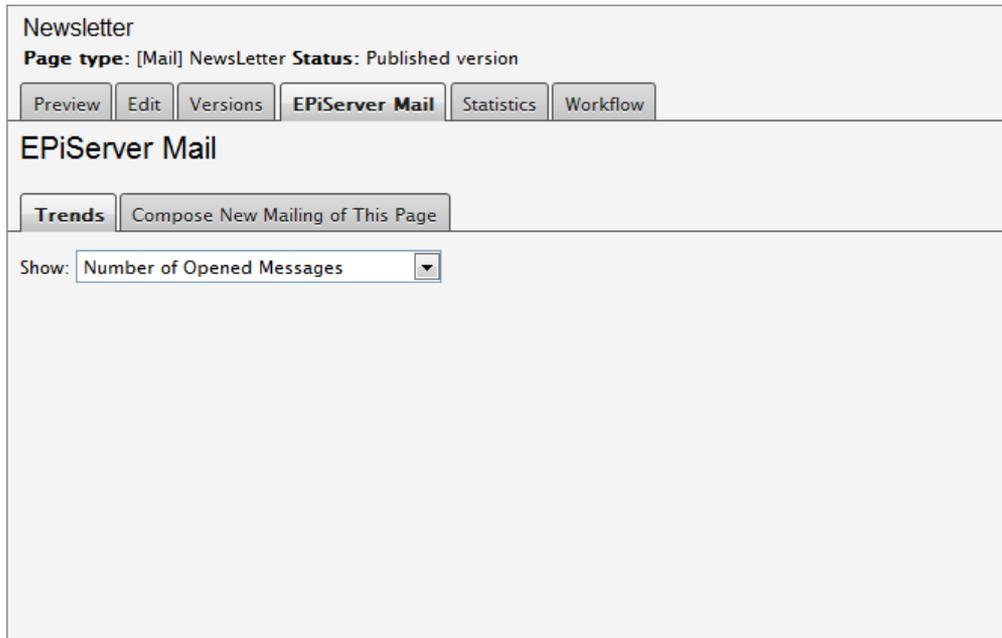


The screenshot shows the EPiServer Mail interface. The left pane displays a site structure tree with the following items: Root folder, Recycle Bin, Home, My Page, Clubs, Images, Videos, Blog, Forum, Members, Tags, Search, [Article Container], [News Container], Building online social communities, Analyze the content and communicate, and [System]. The main content area is titled 'Building online social communities' and shows 'Page Type: News' and 'Status: Published Version'. Below this, there are tabs for 'Preview', 'Edit', 'Versions', 'EPiServer Mail', and 'Workflow'. The 'EPiServer Mail' tab is active, showing a 'Message History' section with a table of statistics.

Subject	Sent	Scheduled	Recipient List	Recipients	Opened	Unique Opened	Clicks
Using social media	3/3/2011 1:26 PM		Test users	8	3	2	3

On the **Message History** tab you can see the first statistics being generated after the mailing has been sent, for example, the total number of recipients and clicks, and how many of them who have opened the message.

Trends Tab



On the **Trends** tab you have the following options to see message statistics over time:

- **Number of Opened Messages.** Shows the number of messages that have been opened. A message is considered opened when a user has opened the message in an e-mail client and downloaded the pictures (depends on the e-mail client used).
- **Number of Unique Opened Messages.** Shows the number of messages that have been opened by a specific user identified by the recipient ID. This information is used when generating the **Export Clicks** statistics in the **Link Report** (under the **Mail** tab), for sent mailings.
- **Number of Link Clicks.** Shows the number of times **users**¹ have clicked on links in the message. This information can also be monitored for specific links in each e-mail under **Show Link Statistics** (under the **Mail** tab) for sent mailings.
- **Number of Bounced Messages.** Shows the number of bounced messages. This information can also be graphically monitored for each message under the **Mail** tab, **Sent Mailings/Delivery Report** tab.
- **Number of Recipients.** Shows the number of recipients that have received the message.

¹The number of unique work stations that visited this page/URL during specified period. Cookie-based identification.

Handling Account Statistics

The **Account Statistics** menu option allows you to gain control of your mailing costs. In the **Price List** section, the prices for the different levels of e-mails per month are shown, and these may differ depending on EPiServer Mail license type. In the **Mailing statistics for the last three months** section, your past mailing statistics are shown, as number of delivered messages per month. (It will be shown as four rows/months, as the total number of days during three calendar months will span over a four month period).

The screenshot shows the EPiServer Mail administration interface. The top navigation bar includes 'Start', 'CMS', 'Community', and 'Mail'. The 'Mail' section is active, and the left sidebar shows 'Mail', 'Mailings', 'Recipients', 'Statistics', and 'Sections'. The main content area is titled 'Statistics' and contains the following sections:

View statistics for different accounts

Price List

Level	Price
0 - 50 000 e-mails per month	€200
50 001 - 100 000 e-mails per month	€360
100 001 - 200 000 e-mails per month	€620
200 001 - 300 000 e-mails per month	€770
300 001 - 400 000 e-mails per month	€820
400 001 - 500 000 e-mails per month	€870
500 001 - 650 000 e-mails per month	€1000
650 001 - 800 000 e-mails per month	€1100
800 001 - 1 000 000 e-mails per month	€1400
> 1 000 000 e-mails per month, per e-mail	€0.001

Mailing statistics for the current month and the last three months

Month	Delivered messages
Total in this period	0

Managing Sections

The recipient lists defined in EPiServer Mail can be set up to be used by different **users**¹. For instance, if you have a recipient list that is to be used only by a limited number of users, this can be accomplished by the use of **Sections** in EPiServer Mail. You add a section to enable certain sections of EPiServer Mail for the user, including one or many recipient lists. To create a new section, click **Create New** button, and in the **Edit Section** group box, enter the name of the section. In the **Search users/groups** group box, search for the users/groups to be added to this section, and select the access rights they should have.

The screenshot displays the EPiServer Mail administration interface for managing sections. The top navigation bar includes 'Start', 'CMS', 'Community', and 'Mail'. The left sidebar shows a tree view with 'Mail' expanded, containing 'Mailings', 'Recipients', 'Statistics', and 'Sections'. The main content area is titled 'Sections' and contains the following elements:

- A 'Create New' button.
- A 'Section Name' and 'SiteID' input field.
- A table showing existing sections:

Section Name	SiteID	Edit	Remove
Test Section		[Edit]	[Remove]
- An 'Edit Section' form with 'Name' and 'SiteID' input fields and a 'Save' button.
- A table showing user permissions:

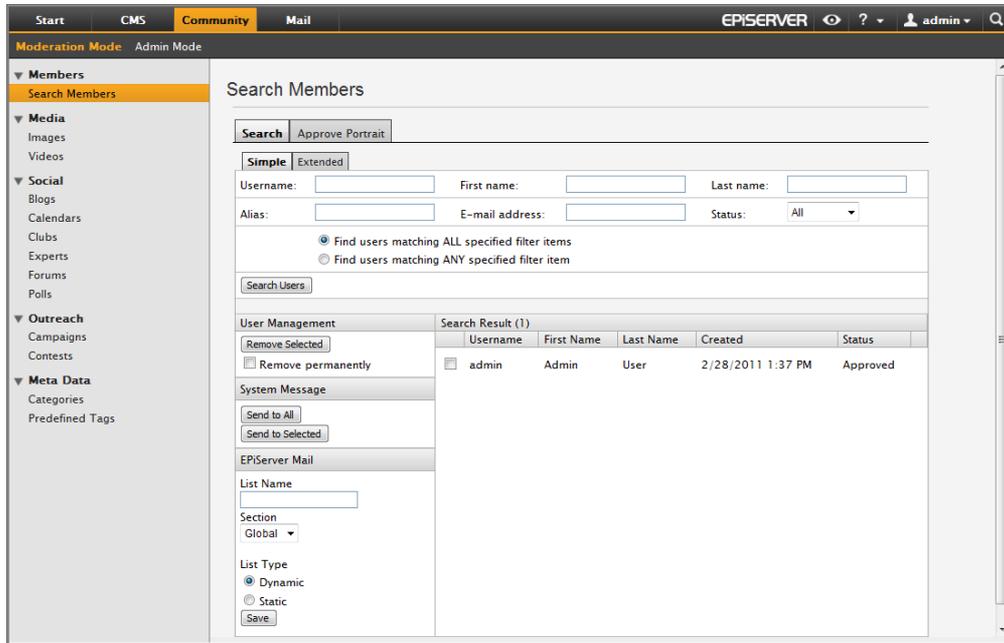
Name	Read	Create	Change	Remove	Administrate	Remove
CommunityAdmins	<input checked="" type="checkbox"/>	[Remove]				
- A 'Search users/groups' section with a search input field containing 'community', a dropdown menu set to 'All', and a 'Search' button.
- A table showing search results:

Name	Add
CommunityAdmins	[Add]
CommunityModerators	[Add]
CommunityMembers	[Add]

¹The number of unique work stations that visited this page/URL during specified period. Cookie-based identification.

Integrating with EPiServer Community

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



The screenshot displays the EPiServer Mail administration interface. The top navigation bar includes 'Start', 'CMS', 'Community', and 'Mail'. The left sidebar shows a tree view with categories like 'Members', 'Media', 'Social', 'Outreach', and 'Meta Data'. The main content area is titled 'Search Members' and contains the following elements:

- Search Filters:** Includes 'Search' and 'Approve Portrait' tabs. Below are input fields for 'Username', 'First name', 'Last name', 'Alias', and 'E-mail address'. A 'Status' dropdown is set to 'All'. Radio buttons allow filtering by 'ALL specified filter items' (selected) or 'ANY specified filter item'.
- Search Results:** A table titled 'Search Result (1)' with columns: Username, First Name, Last Name, Created, and Status. The table contains one entry: 'admin', 'Admin', 'User', '2/28/2011 1:37 PM', 'Approved'.
- User Management:** Includes a 'Remove Selected' button and a checkbox for 'Remove permanently'.
- System Message:** Includes 'Send to All' and 'Send to Selected' buttons.
- EPiServer Mail:** Includes a 'List Name' input field, a 'Section' dropdown set to 'Global', and 'List Type' radio buttons for 'Dynamic' (selected) and 'Static'. A 'Save' button is at the bottom.