Optimizely Campaign

User Guide

for all countries except DACH-countries

© Optimizely 2022

Optimizely Campaign User Guide

Release date 2022-03-14

Table of contents

© Optimizely 2022

© Optimizely 2022

© Optimizely 2022

© Optimizely 2022

© Optimizely 2022

Basics

This section describes the basics of Optimizely Campaign to get started.

- Introduction. Introduction to this document and information about the security functions.
- Getting started. Learn more about Optimizely Campaign and create a campaign.
- Logging in. Work with the Optimizely Campaign user interface, including logging in and out.
  - Start page
  - Lists and folders
- User management. Set up user accounts and permissions.
- Roles. Create permission profiles.
- Clients. Layout of the Optimizely Campaign working environment.
- Deliverability basics. Information and best practices for a successful deliverability of emails.
- Exclusive IP addresses. Information on dedicated IP addresses.
- ISO 27001 certification. Gives you the guarantee that Optimizely's safety management for operation, service and development of email marketing platform complies with internationally recognized standards regarding data and information security.
- Service description. Overview of standard functions and upgrade options.

Introduction

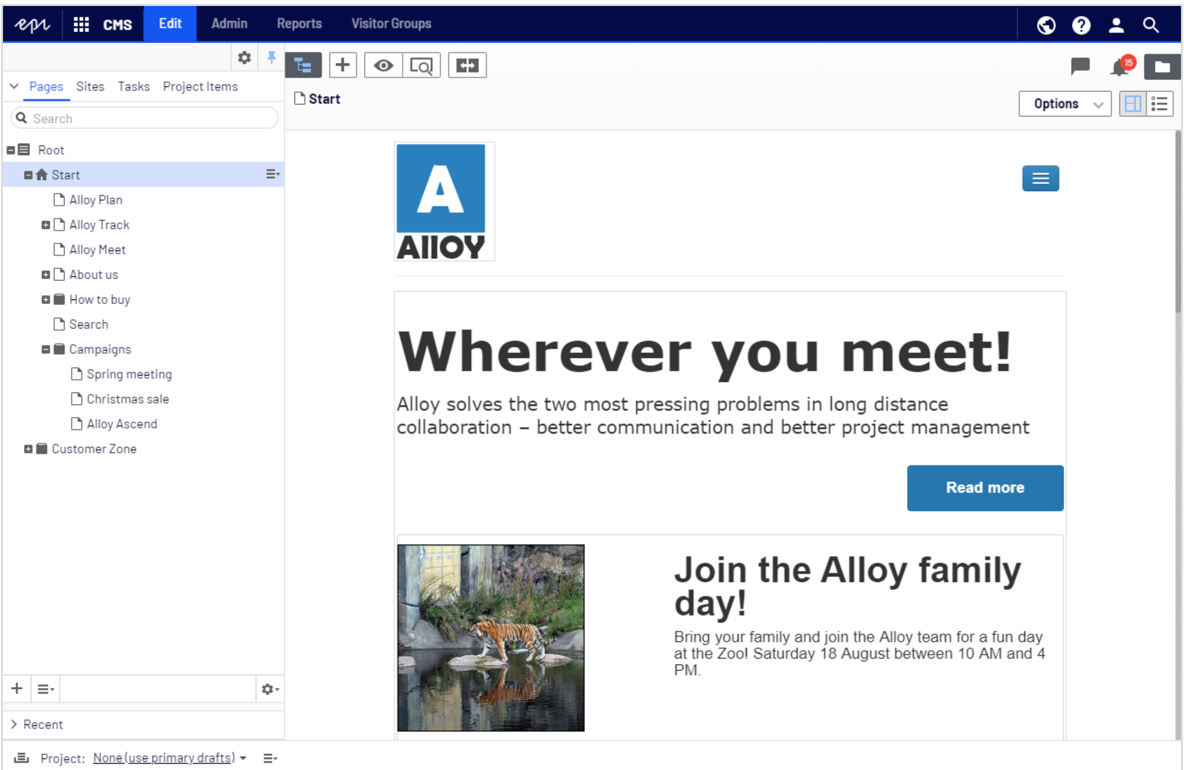
Online help describes the features and functionality of the Optimizely Digital Experience platform and covers Optimizely CMS for content management, Optimizely Commerce for e-commerce functionality, Optimizely Campaign for omnichannel campaigns, Optimizely Search & Navigation for extended search, Optimizely Visitor Intelligence for visitor profiles and customer segments, Product and Email Product Recommendations, and Triggered Messages for personalized product recommendations, and Optimizely add-ons.

You access the online help from within the Optimizely platform or from Optimizely World. The online help is also available in PDF format for users who prefer PDF or want to print the documentation.

© Optimizely 2022

This PDF describes the features and functionality of Optimizely Campaign, which you can find on Optimizely World. Developer guides and technical documentation also are found on Optimizely World.

The user guide is intended for editors, administrators, marketers and merchandisers, working with tasks as described in Roles and tasks.



Features, licenses and releases

The user documentation is continuously updated and covers the latest releases for the Optimizely platform.

Optimizely CMS is the core part of the Optimizely platform providing advanced content creation and publishing features for all types of website content. CMS features are available in all Optimizely installations.

Optimizely Commerce adds complete e-commerce capabilities to the core functionality in CMS. It requires a specific installation and license.

Optimizely Campaign lets you orchestrate omnichannel campaigns from a single screen, and send triggered emails based on real-time behavior. Campaign requires additional license activation.

Optimizely Search & Navigation adds advanced search functionality to websites. It is included in the Optimizely Cloud services; for on-premises installations it requires a specific installation and license.

Optimizely Visitor Intelligence is a user interface for viewing and filtering visitor profiles, and creating customer segments that can be used in omnichannel marketing campaigns. It requires a specific installation and license.

Product Recommendations lets you create and configure a merchandising campaign with personalized product recommendations from the personalization portal. It requires a specific installation and license.

Email Product Recommendations lets you include personalized product recommendations in any email, including cart abandonment and retargeting emails, from the personalization portal. You can also work with behavioral triggers to detect on-site behaviors and act upon them through automated, personalized emails. It requires a specific installation and license.

Add-ons extend the Optimizely capabilities with features like advanced search, multi-variate testing, and social media integration. Some add-ons are free, others require license activation. Add-ons by Optimizely are described in the online help.

> **Note:** Due to frequent feature releases, this user guide may describe functionality that is not yet available on your website. See What's new to find out in which area and release a specific feature became available.

Images and screenshots

The Optimizely user guide uses images and screenshots to visually guide you through the features of the Optimizely platform. Due to different versions, continuous updates, and specific system permissions, images and screenshots may differ from the actual appearance.

Notes

Three types of notes are color marked throughout the user guide: tips, notes and warnings.

> **Tip:** Green indicates tips that might show you an easier way to perform a task.

> **Note:** Yellow indicates important information that may affect your work and should not be missed.

> **Warning:** Red indicates warnings. If these warnings are ignored, serious errors or problems may occur.

Copyright notice

© Optimizely 1996–2022. All rights reserved.

All information and content within this document is the sole copyright of Optimizely which includes all companies and affiliates in the Episerver group. Changes to the contents, or partial copying of the contents, may not be done without permission. The document may be freely distributed in its entirety, digitally or in printed format, to all users of Optimizely and Episerver Software. Optimizely assumes no liability or responsibility for any errors or omissions in the content of this document. Optimizely reserves the right to alter functionality and technical system requirements. 'Optimizely' is a registered trademark of Optimizely Inc. Ektron is a registered trademark of Episerver Inc.

What's new?

This user guide describes functionality available in the latest release of a standard implementation of the Optimizely platform software and services. New features are continuously made available. See Optimizely updates.

> **Note:** Due to frequent feature releases, this user guide may describe functionality that is not yet available to you. Contact your system administrator for information about products and versions in your Optimizely implementation.

This release of the Optimizely User Guide describes features available in Optimizely as of 2022-03-14. See release notes (below) for update history. See Archived documentation in the online version of the user guide for previously released user guides and for older release notes.

Release notes 2022

Released	Area	Features and updates
2021-10-21	Campaign	You can now create webhooks for the *spam complaint* event.
2021-10-15	Campaign	The new topic, Setting up the List-Help header, has been added.
2021-09-30	Campaign	As part of the rebranding, the images and attachments feature was redesigned. It is now complete and includes the option to delete created images and attachments. (update 379) When creating or editing users, you can now specify allowed IP addresses and IP ranges to restrict access to the user account. See Managing users. (update 379)
2021-09-28	CMS	The Reports view is no longer supported and is removed. (update 378)
2021-09-28	CMS	The admin view is redesigned. (update 378)
2021-09-28	CMS	Visitor groups user interface is redesigned.

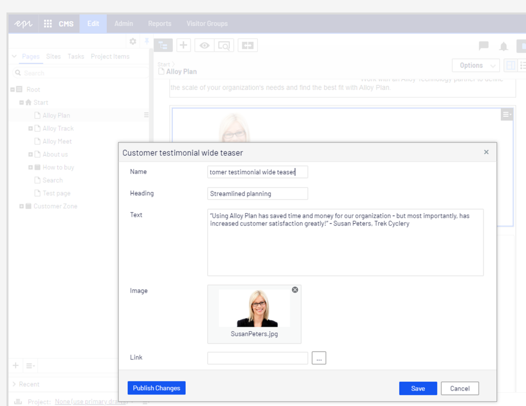
Released	Area	Features and updates
		Criteria previously included in the add-on **Visitor Group Criteria Pack** are now included in Optimizely CMS by default, see Built-in visitor group criteria. (update 378)
2021-09-28	CMS	The dashboard is no longer supported and is removed. Gadgets are now only installed in the navigation or assets panes. (update 378)
2021-09-28	Commerce	The Commerce Manager administration system is removed, and replaced with a new Administration view, from where you can define markets and warehouses, index catalogs, configure taxes, shipping, and payments, and work with dictionary properties. (update 378)
2021-09-28	Commerce	A new Customers view replaces the legacy Customer Management in Commerce Manager. (update 378)
2021-09-28	Commerce	Some functionality, previously managed from Commerce Manager, is now managed through code: • Dictionaries. Adding currencies, countries, and return reasons. • Dictionaries. Adding values for organizations and contacts. • Catalog batch updates and catalog import/export. • Management of business objects, and catalog and meta-classes fields. See Optimizely World for technical details, and previous versions of the user guide for the removed legacy functionality. (update 378)

Released	Area	Features and updates
2021-09-23	Campaign	Mailings Classic and Reports will be deactivated on 2022-03-01. To migrate your mailings to Smart Campaigns, see Mailings Classic. To migrate your reports to the Performance Dashboard and Deep Analytics, see Reports. (update 377) The current Apple operating system versions include the Apple Mail Privacy Protection, which restricts the transmission of tracking information to Optimizely Campaign. See Apple Mail Privacy Protection.
2021-09-09	Campaign	You can now merge mailing content from different campaigns into a new campaign. See Merge content. (update 377)
2021-09-02	Campaign	When importing recipients, you can now merge the contents of recipient list fields of type "String" and "Text". You can either append or prepend the content or replace the old content with the new one. (update 376)
2021-08-12	Marketing automation connectors	The configuration settings screen of the Microsoft Dynamics CRM connector was updated.
2021-08-02	Campaign	The redesigned user interface has been released. Optimizely Campaign screenshots in the user guide have been updated. See Start page.
2021-07-22	Marketing automation connectors	The Pardot connector has a breaking change when you upgrade to version 6. The configuration screen has new fields to create new connectors. Configurations made with older versions of the Pardot connector will no longer work.

Released	Area	Features and updates
2021-07-20	Campaign	You can now create webhooks for the *unsub-scribe* event. (update 373)
2021-07-13	Email Product Recom-mendations	New strategy: Recommendations from cat-egories of purchased products (last 365 days)
2021-06-24	Campaign	If you use the coupon system, you can now optionally create QR codes. You can also use field functions to generate QR codes that refer to specific recipient list fields. (update 371)
2021-06-17	Campaign	See Deliverability basics for information about the BIMI email authentication standard.
2021-06-14	B2B Commerce	Spire roles documented.
2021-06-09	B2B Commerce	Adyen payment gateway plug-in documented.
2021-05-27	Marketing automation con-nectors	Fields were added to the Acoustic (Silverpop) Connector setting screen to include database lists. (update 368)
2021-05-13	Campaign	In Deep Analytics, you can use separate group-ings for the name and ID of mailings, recipient lists, and clients. See Groupings. (update 366)
2021-04-29	Triggered Messages	A new feature was added to the Targeted Dis-count daily trigger to enable the trigger to fire if products were added to a basket but not pur-chased within the last 30 days.
2021-04-22	Campaign	You can now create webhooks for the *bounce* event. (update 364) See Deliverability basics for information about list bombing and learn how to recog-nize these cyberattacks and protect yourself.

© Optimizely 2022

Released	Area	Features and updates
2021-04-15	Campaign	See Deliverability basics for a glossary of the most important terms related to deliverability.
2021-03-31	Campaign	The beta phase of the webhook feature has been expired. You can now create webhooks for the *sent* event and optionally submit the Basic HTTP Authentication header. You can also verify and update webhooks via REST API. See Webhooks. (update 362) You can now display background images in grouping paragraphs and sidebars in the mobile newsletter version. You can also automatically stretch or crop the image to fill the entire paragraph area. See Grouping paragraph. (update 362) The beta phase of the A/B tests for transactional mails feature has been expired. This feature is now available for all users on request.
2021-03-25	Visitor Intelligence	Visitor Intelligence now comes with a set of built-in filter definitions. It is also possible to add time and occurrence filters to segments to further limit matching profiles. See Creating a segment based on filter definition. (update 360)
2021-03-25	Campaign	In the Optimizely Campaign start menu under Scheduled jobs, you can find an overview of the scheduled jobs configured in your client. (update 360) If you use the coupon system, you can generate bar codes based on the values of your recipient list fields via field functions.
2021-02-18	Campaign	In the Marketing Automation's Advanced node, you can specify which recipients are passing

Released	Area	Features and updates
		through the Marketing Automation campaign at which time. You can now define even more precisely when Optimizely Campaign should check the criteria. For example, if you set the interval to *Every 2 months, each 1st from 14:00*, Optimizely Campaign checks the criteria on the first day of every second month at 14:00. (update 355)
2021-02-04	Campaign	If you use the recipient list management, you can now change the field name of recipient list fields. See Editing recipient list fields. (update 352)
2021-01-21	B2B Commerce	The end user documentation for B2B Commerce and Optimizely PIM has now been integrated in this user guide. See sections Optimizely B2B Commerce and Optimizely PIM.
2021-01-21	CMS	Edit and publish blocks in a quick edit view, which lets you edit relevant block properties without leaving the current context. (update 350) 
2021-01-21	Commerce	Customer service representatives can create *notes* associated with carts, orders, and sub-

Released	Area	Features and updates
		scriptions (update 349).
2021-01-21	Personalization	• Create reusable email templates • Export CSV data in localized format for the selected language • Users (with authorization) can change the currency selection
2021-01-21	Campaign	You can now run A/B tests for transactional mails to send different variants of a trans-actional mail and check which variant performs better.

Archived documentation

If your Optimizely implementation is not on the latest version, you can access previous versions of the Optimizely User Guide under Archived documentation in the online version of the user guide.

Getting started

This topic introduces Optimizely Campaign and describes step-by-step how to set up Optimizely Campaign, configure the newsletter subscription on your website and create simple campaigns and mailings.

Setting up Optimizely Campaign

Optimizely Campaign is a service set up by Optimizely. The onboarding setup involves configuring one or more clients, adapted recipient lists, and a feature set depending on your service contract. Furthermore, your marketeers will get user accounts, including personalized permission setups.

To send emails via Optimizely Campaign using the sender domain of your hosted website or web shop, see Setting up your domain for Optimizely Campaign on Optimizely World.

When the setup is done, you can log in to Optimizely Campaign, set up the newsletter subscription and start creating campaigns.

Setting up the newsletter subscription

The newsletter subscription is a fundamental step to attract new mailing recipients for your campaigns. You create newsletter subscriptions using an opt-in process, where the recipient consents to receive promotional emails from you.

Opt-in recipient list

To manage recipients who have subscribed via a form on your website, you need an opt-in recipient list. You can request this recipient list through Optimizely Campaign customer support or create it yourself using the recipient list management.

If you create the recipient list yourself, select **Opt-in** as the list type. Assign at least the **Email** recipient list field to the recipient list. The more recipient list fields you add and the more recipient data you collect, the more precisely you can personalize your mailing. For example, create additional recipient list fields for first name, last name, and salutation.

> **Note:** The assigned recipient list fields must match those in the subscription form.

Opt-in process

The safest and most common opt-in method is the double opt-in method. With this method, the recipient gives their consent to receive promotional mailings. The recipients receives an email with a double opt-in link, which they must click as confirmation in order to be registered for the newsletter. Then the data entered in the subscription form is added to the recipient list. For more information, see Opt-in.

To create an opt-in process, open the Optimizely Campaign menu and select **Campaigns** > **Opt-in Processes**. The opt-in process must contain the previously created opt-in recipient list and an opt-in email including a double opt-in link. See Opt-in processes.

Subscription form

Set up a form on your website to gather the website visitor's contact information. For each input field, there must be a corresponding field in your opt-in recipient list into which the data is imported. Also, set up error messages if, for example, the email address is not entered or entered incorrectly.

For more information on designing and implementing subscription forms, see Creating subscription and unsubscribe forms.

Submitting the recipient data

To submit the contact information that your website visitors enter in the subscription form to the opt-in recipient list, you can use the Optimizely Campaign HTTP API. With the Subscribe operation you add the new recipients to your recipient list, see HTTP API on Optimizely World.

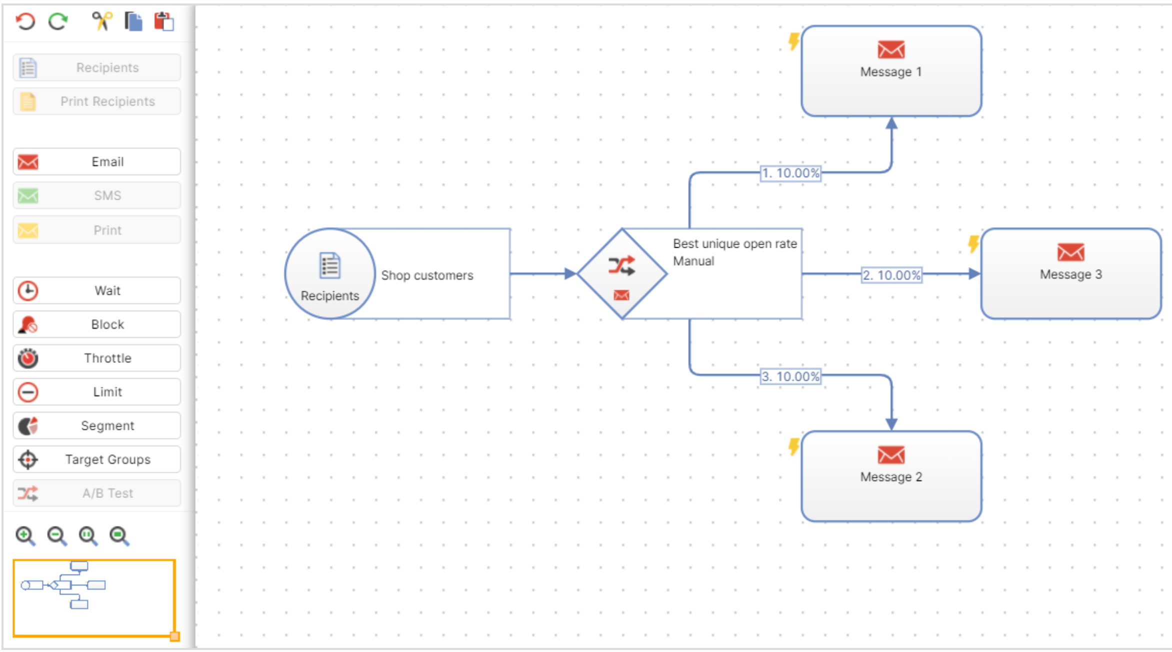
Alternatively, you can also use the Optimizely Campaign REST API operation POST/{clientId}/recipients/{recipientListId}. For this, set up the REST API in your client first, see REST API on Optimizely World.

> **Tip:** To learn how to set up the REST API request and connect it to your subscription form, see the blog post Setting up a newsletter subscription via REST API on Optimizely World.

Creating a campaigns

In Optimizely Campaign, a campaign is the structure, relations, and process flow of elements like *recipients*, *email message*, and actions like *wait* or *limit*. With Smart Campaigns, you can create and visualize one-shot-campaigns using drag-and-drop functionality.

© Optimizely 2022



Campaign preparations

Usually a campaign is preceded by significant preparations. You need to plan the message, the target groups, the channels to use, and revenue goals if any. Use the Smart Campaign feature to visualize the different steps in your campaign. Creating landing pages in Optimizely CMS may also be part of the preparations, as well as preparing associated products, if you have Optimizely Commerce.

If you use other analytic tools for monitoring campaign performance, KPIs (key performance indicators) for these may need to be configured for the specific campaign.

You can tailor campaign messages for selected target groups, to create a more engaging experience and increase conversion. Use visitor groups in Optimizely CMS, to personalize campaign content. With Triggered Messages, you can also configure mailings to trigger on certain recipient actions.

Campaign basics

Smart Campaigns is a powerful tool for visualizing the campaign flow, and orchestrating messages, channels and actions. A message can be distributed using multiple channels.

Email is the most common, but you can also use, for example, SMS and push messages.

These are the fundamentals of a mailing:

- **Recipients**. The target group for the campaign message mailing.
- **Email**. The content message with conversion links leading to desired actions.
- **Campaign**. The elements and actions required to distribute the message.
- **Analytics**. The tools to monitor and follow-up on campaign performance.

When working with mailings, it is important to consider best practices regarding deliverability, to ensure high delivery and opening rates for your campaigns.

Campaign process flow

Below is an example procedure when preparing and launching a campaign with Optimizely Campaign.

1. Recipient data. Define your message audience from recipient lists.
2. Email message. Create the email design and content. Use a copy of an existing mailing, the Template Kit delivered with Optimizely Campaign or your own layout.
3. Create the campaign using the Smart Campaigns flow visualization. You can update the campaign as needed, when working with the associated elements.
4. Test mailing. Test and validate email design and content, send out mailing to selected test recipients.
5. Start campaign. Activate and send the campaign to launch a full sendout on time, monitor statistics, bounces and replies.
6. Analyze result. Evaluate campaign KPIs, visualize click-tracking, and generate reports.
7. Post-launch work. clean-up recipient lists, manage blocklists, and responses.

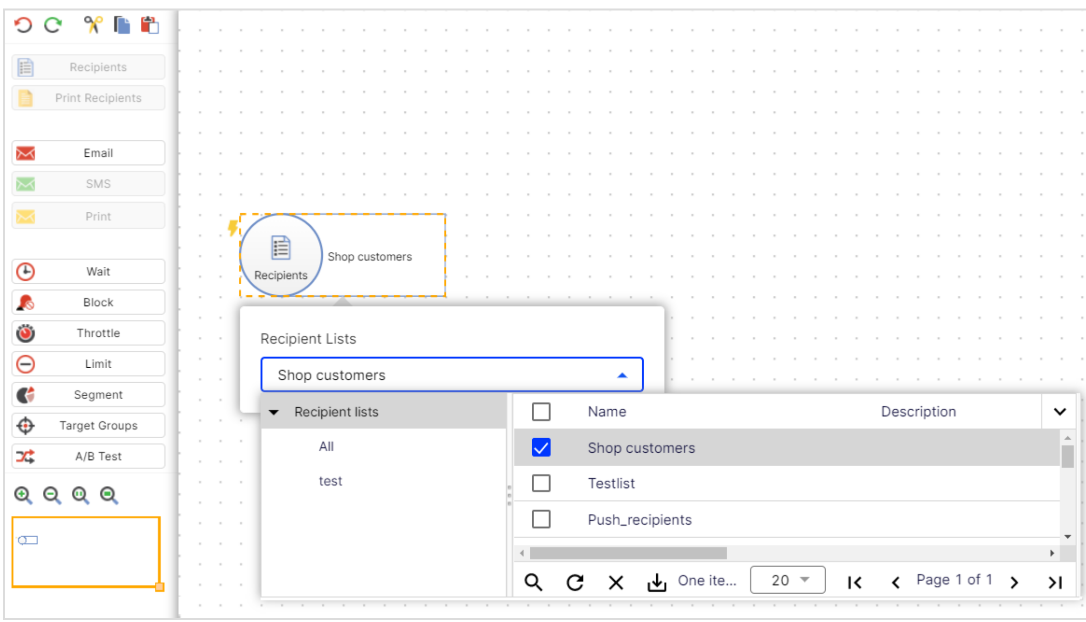
Many campaign elements can be reused in future campaigns, thereby reducing the amount of preparation work, and speeding up the creation process.

Example: Email campaign "Fall Fashion Sale"

You have a website with Optimizely CMS and Optimizely Commerce, and want to make newsletter subscribers aware of our upcoming "Fall Fashion Sale". You have prepared a set of content, products in Commerce and a landing page in CMS. These associated content items have been scheduled to be published just before the email, with links to the landing page, is sent out.

Create a simple mailing campaign with a recipient list, and an email message. Test the mailing and launch it, and then follow-up on the result.

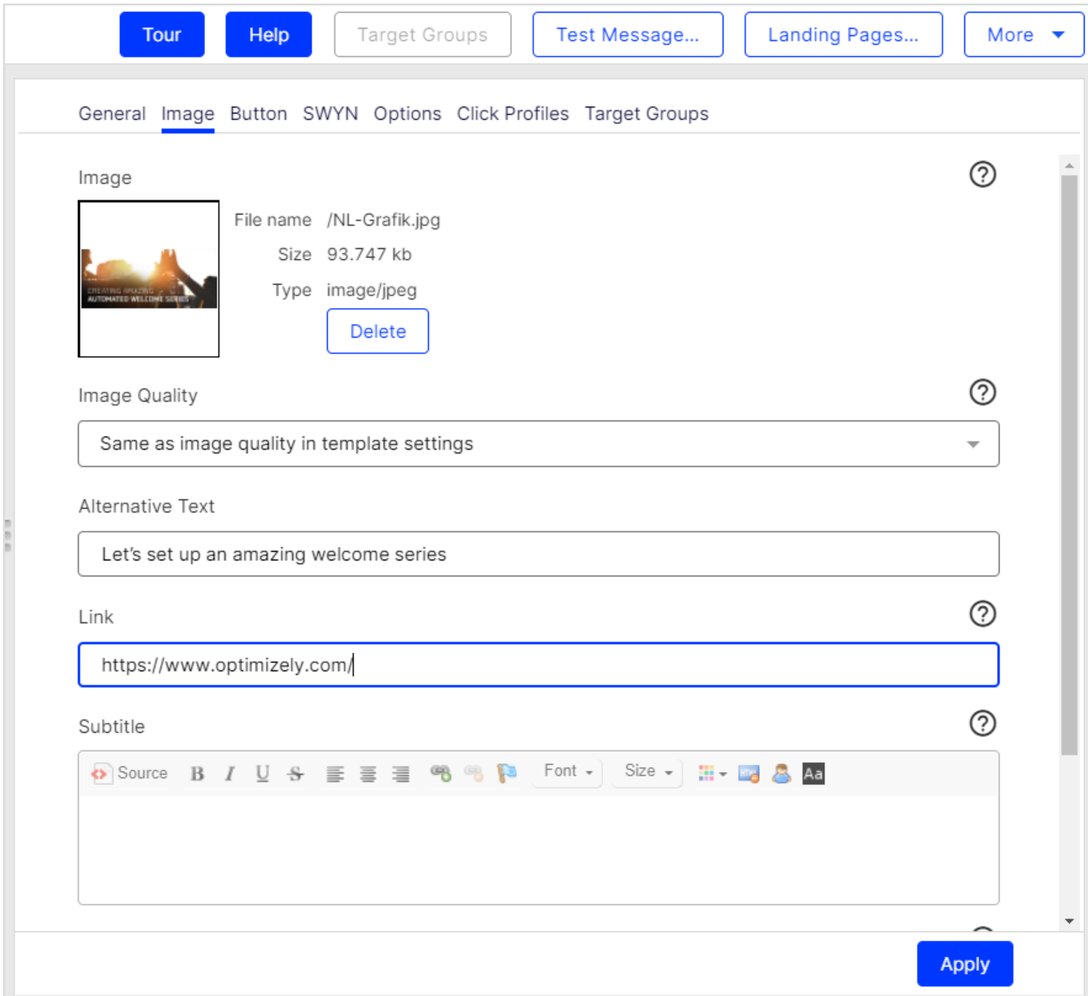
1. Create the campaign structure.
   a. Open the Optimizely Campaign menu and select **Campaigns** > **Smart Campaigns**. In the next window, click **Create...** and select **Empty draft**. Confirm by clicking **Apply**.
   b. Drag and drop the **Recipients** node into the campaign area, and select the opt-in recipient list you have previously created for the double opt-in process. This ensures that only recipients who have subscribed to your newsletter receive the mailing.



   c. The campaign can be of different types depending on channels. To add an email message, drag and drop an **Email** node into the campaign area, and give it an intuitive name.
   d. Connect both nodes and click **Save**. Give the campaign an appropriate name and click **Save** in the validation dialog box. This will display missing details, if any. As

long as the validation finds missing details, the campaign will be stored in *Incomplete* state.

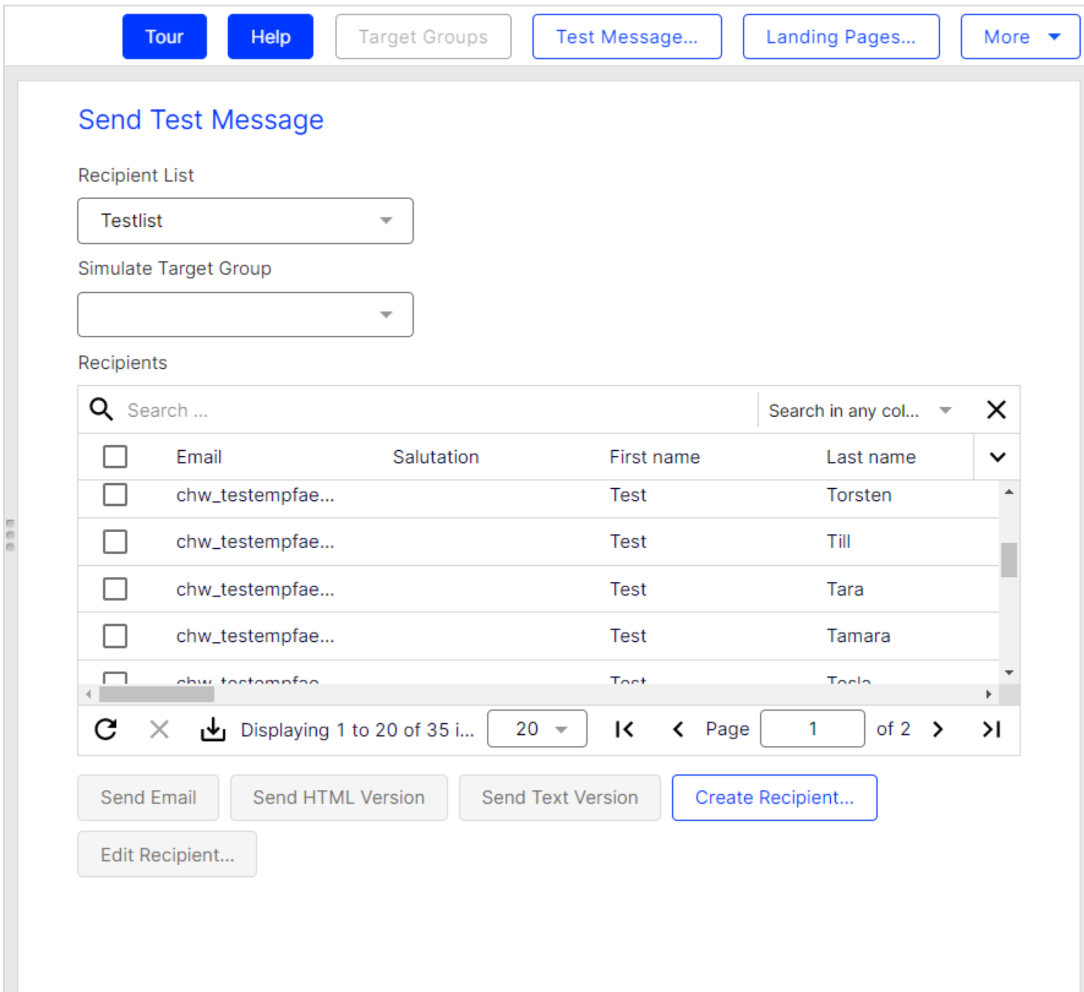
2. Edit the email message.
   a. In the campaign area, select edit for the **Email** node, and click **Edit Content…**. Select a template in the displayed list, to use for the mailing, and click **Next**.
   b. To modify the sender and subject, click Sender, subject, attachments to the upper left, update the information in the section to the right, and click **Apply**.
   c. To adapt content (text, images and links), click a paragraph's name and update it in the right area, then click **Apply**.
   d. To add images via a Text/Image paragraph, select the tab **Image** and upload the file. You can also add assigned links. Links in the message will automatically be included in the default tracking, to follow-up on clicks and page openings when the campaign has been launched.



e. You can preview the output using different options in the top menu, for example **Mobile** or **Online Version**.

3. Test the email message prior to launch.

a. The mailing can be tested using predefined test recipients. Click **Test Message...**, select a test group, or individual recipients, and click **Send Email**.



b. You can also send HTML-only or text versions. Test messages can also be sent from the message node in the campaign area, or from the Smart Campaigns overview.

4. Launch the campaign.

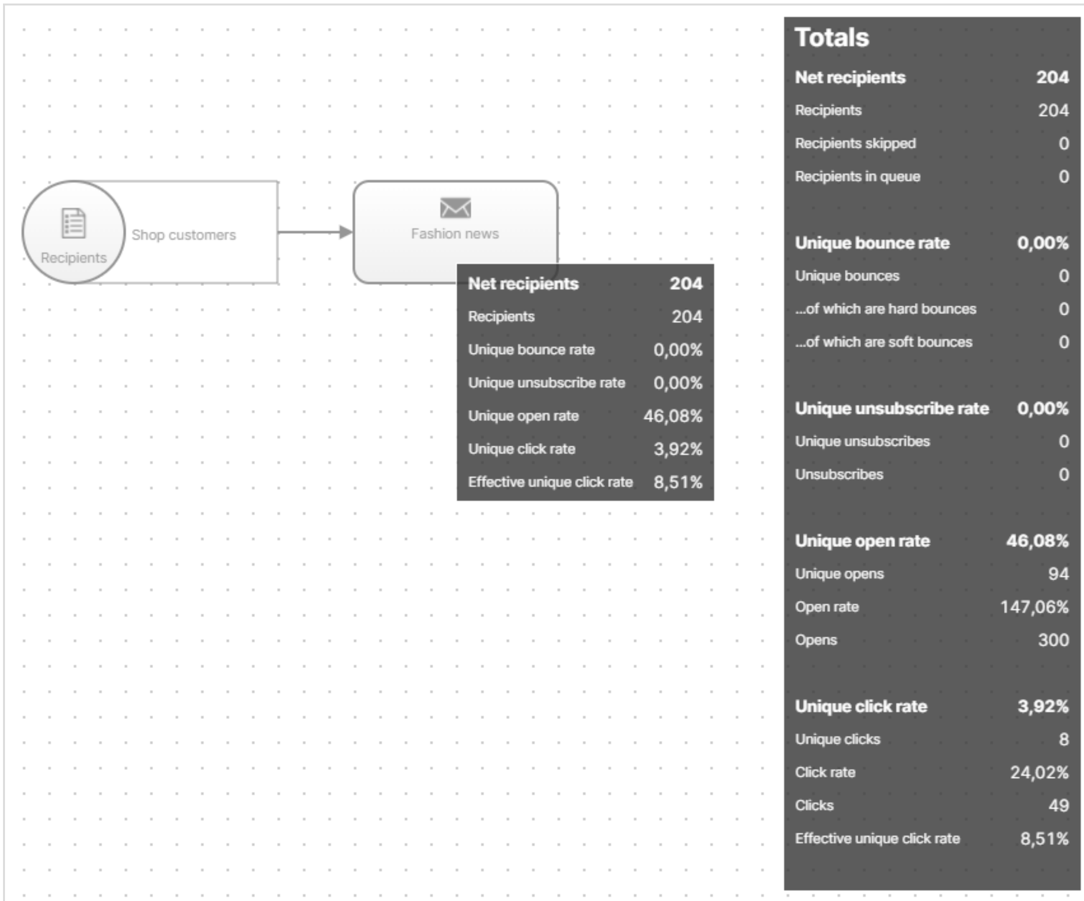
When all message items are correctly configured, and you are comfortable with the incoming test emails, you can launch the campaign. Campaigns must be activated before they can be started. Campaigns with a specified sending time are sent automatically once activated.

   a. Save the campaign, and go to **Campaigns** > **Smart Campaigns**.
   b. Select the campaign in the list and click **Activate**. The campaign and all associated elements will receive the status *Activated*.
   c. To start the campaign, click **Start**, and **Start campaign** to confirm. The sending of the mailing to the associated recipient list starts, and the campaign status changes to Sending. When completed, the status changes to *Sent*.

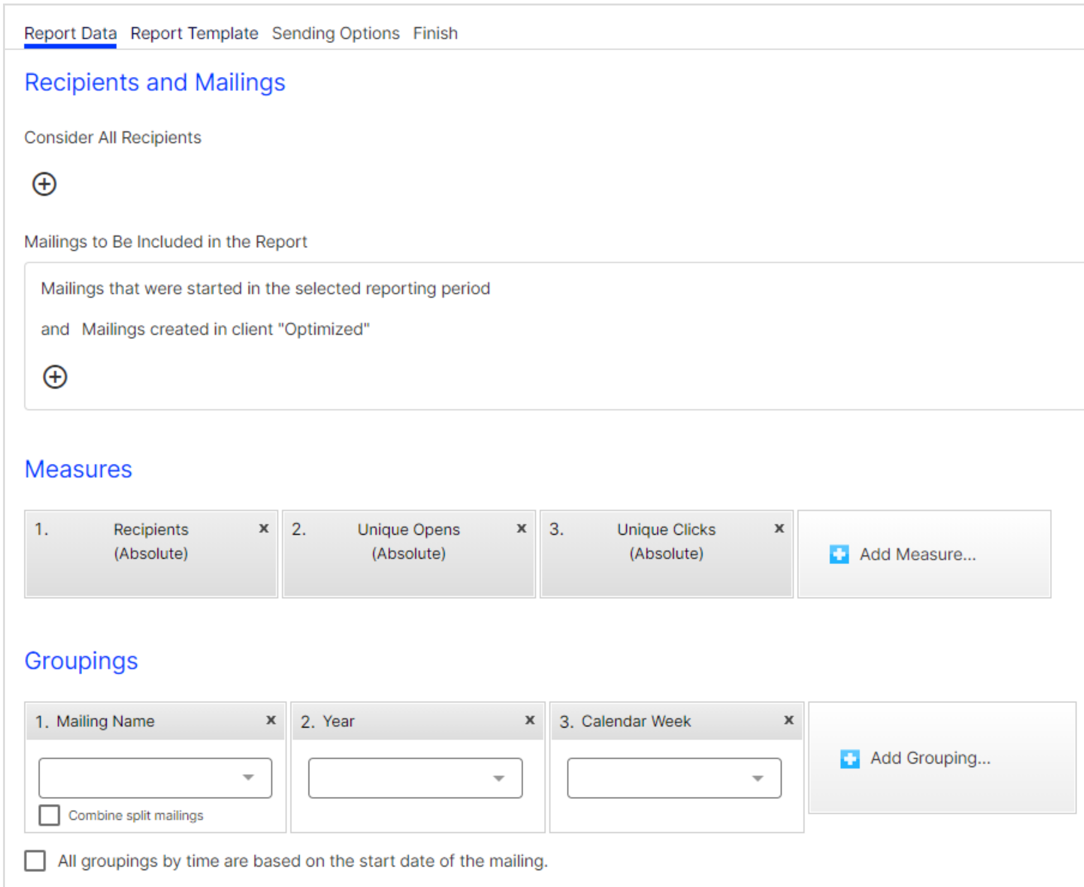
5. Analyze the results.

   After sending, you can begin monitoring the campaign to see how many emails were opened, number of clicks on links, and bounce rates. You can create reports, and visualize links clicked in the email message.

   a. Go to **Smart Campaigns** in the Campaign overview, select the campaign, and click Analysis to see a result summary including rates for bounces, clicks and opened emails.



b. With Deep Analytics you can generate reports with your KPIs. Reports can be created manually or automatically. You can use existing report templates, or create your own.



c. You can visualize clicked links as heat maps in the message. The image can be saved, for inclusion in reports. Select Visual link analysis under **Analytics** to access this feature.

Unlocking the Intent Data Code

Get the guide 3 (1.07%)

ABM vs individualized marketing, Natural Language Processing, and how first and third-party data work within your MarTech stack

Hi

As a company selling tools primarily for marketers, we get asked a lot of questions about emerging and existing trends. That's why we decided to take a closer look at these trends and dive into the most popular questions. In our first guide we take on Intent Data.

Even though Intent Data has been around for a while the hype surrounding it is still strong. Read our guide to unlock the Intent Data code and understand what's the real deal and what's just hype.

This guide covers:

- How to make sense of first-party intent data
- Differences between individualized and account-based marketing
- How natural language processing works
- The building of an interest profile
- ID stitching across marketing automation
- How first and third-party data differ

15 (5.36%)

Get the answers

PS: You can get even more answers in our related on-demand webinar. Watch it now: "Unlocking the Intent Data Code: Separating Fact from Fiction with First-Party Intent".

15 (5.36%)

More features

There are many more features in Optimizely Campaign that you can work with to further extend, automate, and optimize your campaigns. Below are a few examples.

- Template Kit. Use your corporate design styles and turn these directly into mailings, without any special knowledge of graphic design or composition.
- A/B test. Optimize your message by sending variants of an email, and comparing key figures to determine which one works the best.
- Send time optimization. Customize the sending time of your mailing, automated for each individual recipient, to increase the chances of the email being opened.
- Marketing Automation. Create multi-step campaigns with action and event-based mailings by using the drag and drop graphical interface.
- Target groups. Define the recipients of your campaigns by specific rules and conditions, and personalize the mailing content.
- Click profiles. Define recipient groups based on click behavior in previous mailings.
- Recipient history. Evaluate the entire timeline of individual recipients, to see which messages you have sent to whom, and in which format.

Logging in and out

This topic describes how to activate your user account, log in to Optimizely Campaign, reset password and PIN, and log out.

Activating the user account

> **Note:** Before your first login, activate your account by referencing two emails from Optimizely: an activation email containing your personal activation key and a second confirmation email.

1. Open the activation email and click **Activate user account**.
2. Enter the activation key provided in the second email, then click **Continue**.
3. Complete the fields and click **Continue**.

4. Create a password and a PIN and click **Save**.

   After you complete the entries, you receive another email asking you to confirm your activation.

5. In that email, click **Confirm activation**.

   You can now log into Optimizely Campaign at http://www.campaign.episerver.net/.

Logging in

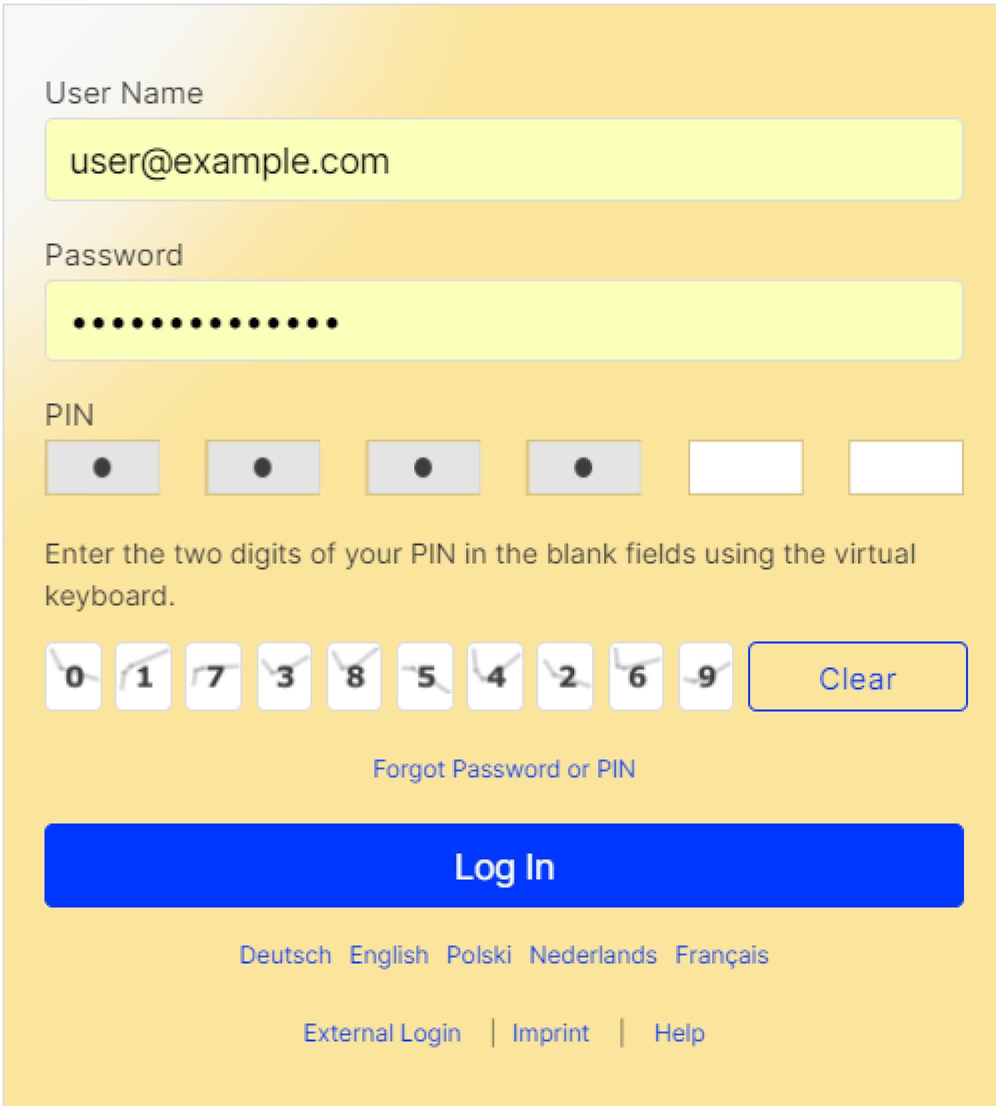
Use the login screen to verify your identity and prevent malware intrusion.

1. Go to www.campaign.episerver.net.
2. Enter your user name and password.
3. Into the row labeled **PIN**, enter digits of your PIN in the open positions by clicking numbers on the onscreen keyboard.

   > **Note:** The virtual keyboard's numbers are in random order.

   For example, if your PIN is **123456** and the login screen appears as below, enter **1** into the first position (from the left) and **3** into the third position. Notice that positions 2 and 4-6 are filled with black dots, indicating you do not need to enter those characters.

© Optimizely 2022



4. Click **Log In**.

> **Tip:** If your browser or the network from which you are accessing Optimizely Campaign does not support SSL, contact customer support.

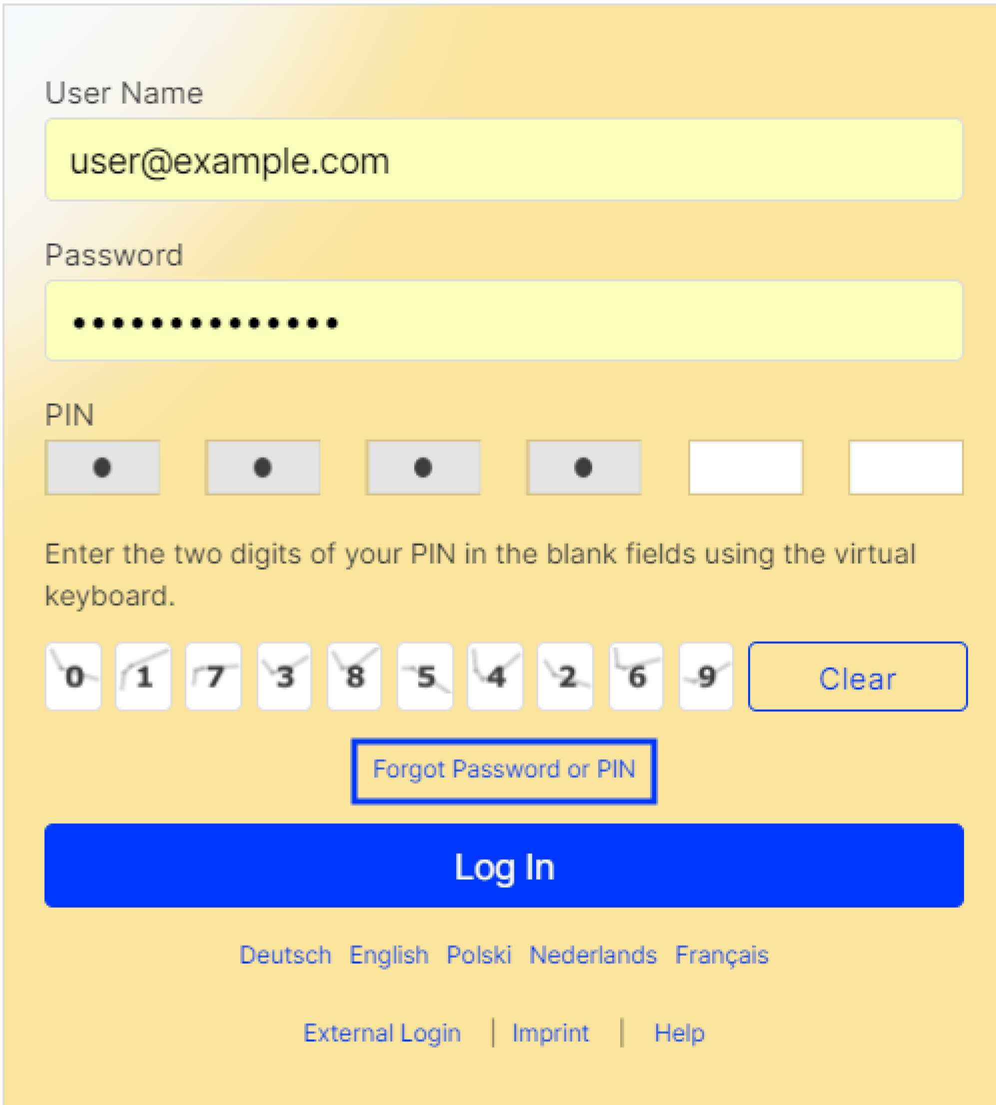
Tip: If you forget your user name, contact the person at your company from whom you received your login data or Optimizely customer support.

Resetting password and PIN

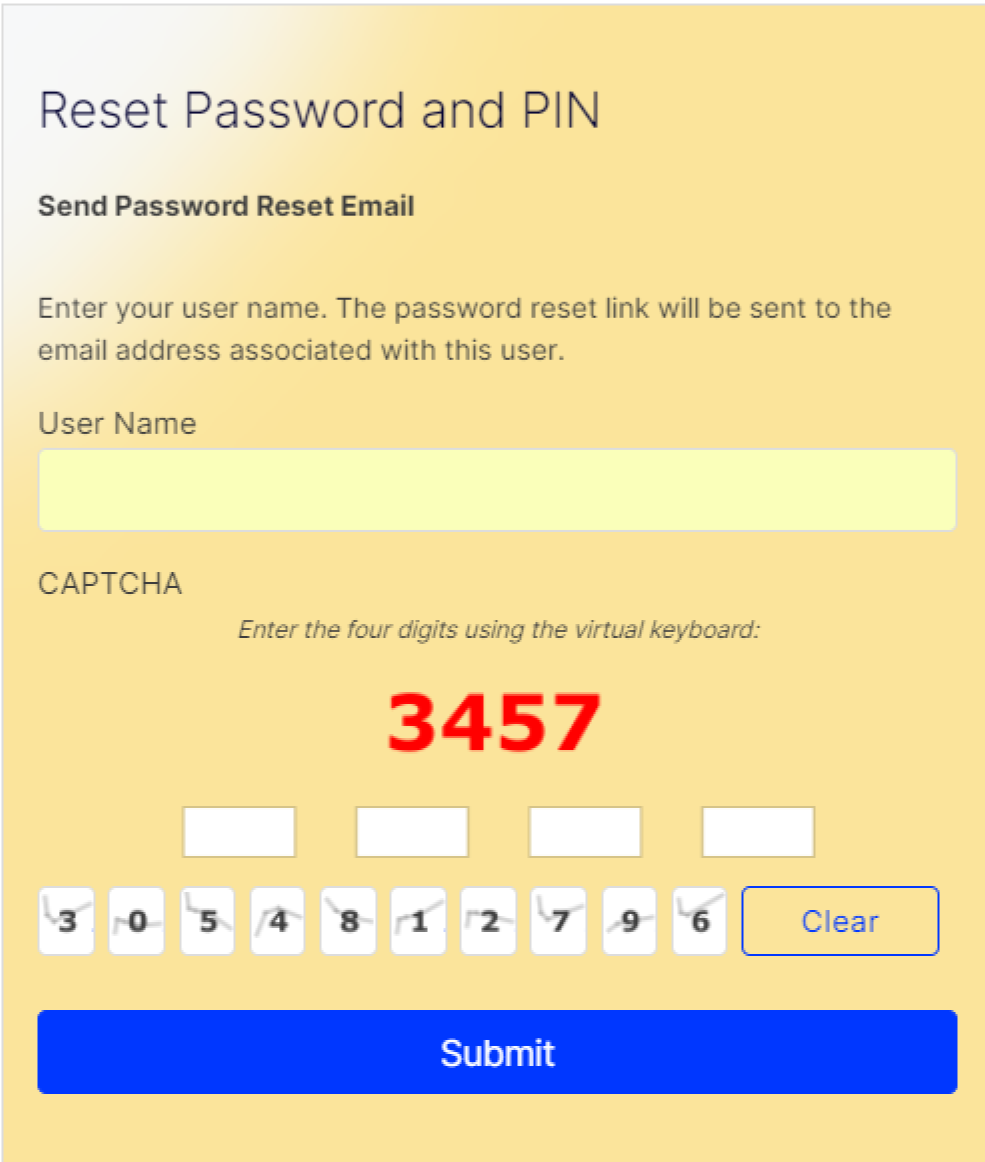
If you forget your password or PIN:

© Optimizely 2022

1. Click the **Forgot Password or PIN** link.



2. In the **Reset Password and PIN** dialog box, enter your user name.



3. Under **CAPTCHA**, enter the four digits using the virtual keyword.
4. Click **Submit**. Optimizely Campaign sends an reset password email to the email address associated with the user name.

5. Go to the inbox of your email account and open the email from Optimizely Campaign.

    > **Note:** For security reasons, you will not get an error message if Optimizely Campaign could not send the reset password email (for example, if the user name does not exist). Contact customer support if the email does not reach you.

6. In the email, click the **Reset password** link.
7. In the Optimizely Campaign **Reset Password and Pin** dialog box, enter a new password and confirm it in the **Repeat New password** field.

    > **Note:** The password must have at least eight characters and must contain either a number or a special character (&, @, $, §,...).

8. Click **Next**.
9. In the **Reset Password and Pin** dialog box, enter the digits of your current or new PIN in the blank fields using the virtual keyboard, and confirm it in the fields below.
10. Click **Submit**.
    If the entered passwords match and fulfill the requirements, you will receive a confirmation message. Return to the login screen and enter your user name and the new password.

Logging out

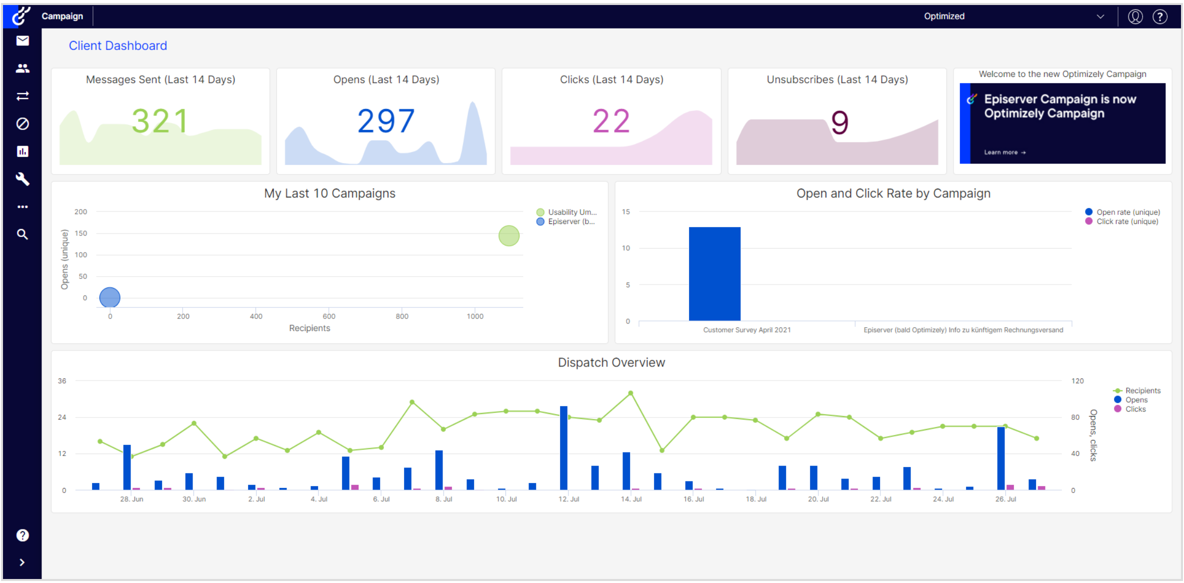
End each session by clicking **Logout** to prevent third parties from accessing the system.

Start page

After logging in to Optimizely Campaign, the start page appears showing a dashboard with information and data on your latest campaigns.

> **Tip:** To customize the diagram display of the dashboard widgets, see **Widget features**.

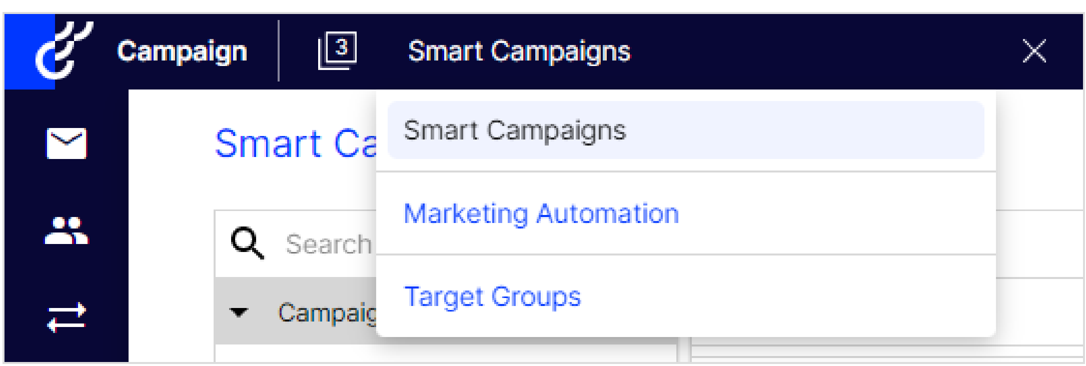
The top bar lets you navigate Optimizely Campaign and access the profile area. The menu bar to the left lets you access all available features based on your user account, the package, and your permissions.



Top bar

The top bar lets you navigate Optimizely Campaign.

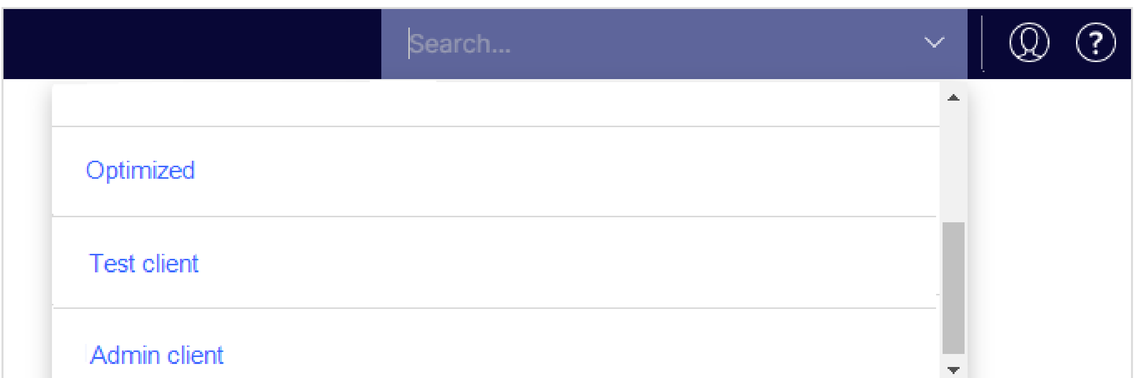
- **Window chooser**.
  - The stack icon displays the number of open windows.
  - The drop-down list lets you choose among open windows.



> **Tip:** To return to the start page at any time, click the Optimizely logo in the upper left corner.

> **Note:** Do not use the forward and back buttons in your browser because any unsaved work may be lost; use the window chooser to navigate among windows.

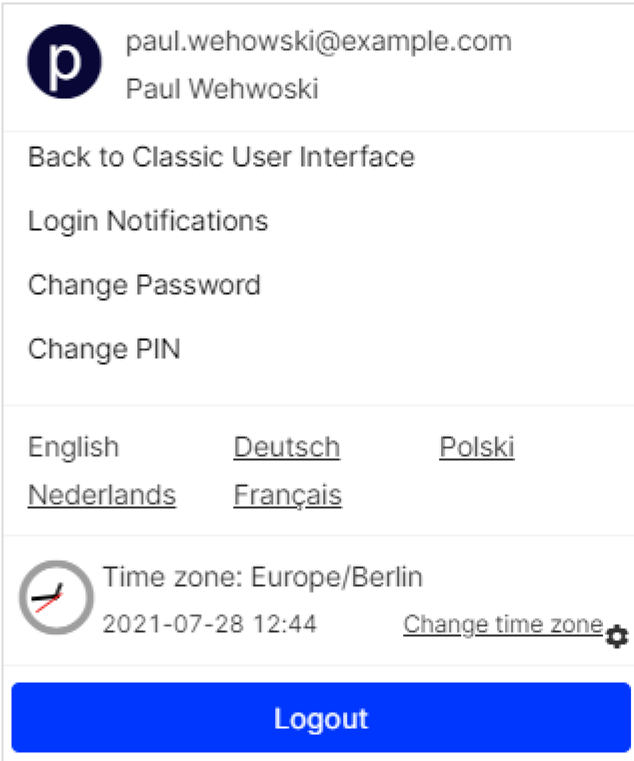
- **Client chooser**. A drop-down list lets you choose among clients set for your user account.



- **Profile area**. To open the profile area, click .
- **Help**. To access the contextual help in the Optimizely User Guide and see further documentation, click .

Profile area

In the profile area, you can manage your user settings.



You can make the following settings and changes:

- Click **Back to Classic User Interface** to switch to the classic Optimizely Campaign user interface.

> **Tip:** For documentation of the deprecated Optimizely Campaign user interface, see Optimizely User Guide 21-3.

- Click **Login Notifications** to enable or disable login notifications, which inform you about login attempts.
- Click **Change Password** to change it. An email confirmation is sent to you.
- Click **Change PIN** to change it. An email confirmation is sent to you.
- Click the displayed language to change it to German (Deutsch), English, Dutch (Nederlands), Polish (Polski) or French (Français).

© Optimizely 2022

> **Warning:** Save your work before changing the language. Unsaved changes are lost if you change the language of Optimizely Campaign.

- Click **Change time zone** next to the time zone to change it. The **Change Time Zone** window opens.
  1. Select a region from the **Region** drop-down list.
  2. Select a time zone from the **Time Zone** drop-down list.
  3. Click **Change Time Zone**.

> **Note: System time**
>
> If the time zone support is *not* activated in your client, the profile area shows the system time of the Optimizely data center. This corresponds to central European time (CET), which may be different from time at your location.
>
> For example, if you are in London (one hour behind CET) and set a dispatch time of 17:00, then Optimizely Campaign sends the message at 18:00 your time. On the other hand, if you are in Istanbul (one hour ahead of CET) and set a dispatch time of 17:00, Optimizely Campaign sends your message at 16:00 your time.
>
> Also, daylight savings time may vary by an additional hour compared to your time zone.
>
> Dates are entered in the format YYYY-MM-DD and correspond to the ISO 8601 international standard. Example: 15th May 2017 is displayed as 2017-05-15.

- Click **Logout** to end your session.

> **Warning:** Save your work before logging out. Unsaved changes are lost when you confirm the logout.

Menu bar

The permanently visible menu bar on the left lists all available Optimizely Campaign features.

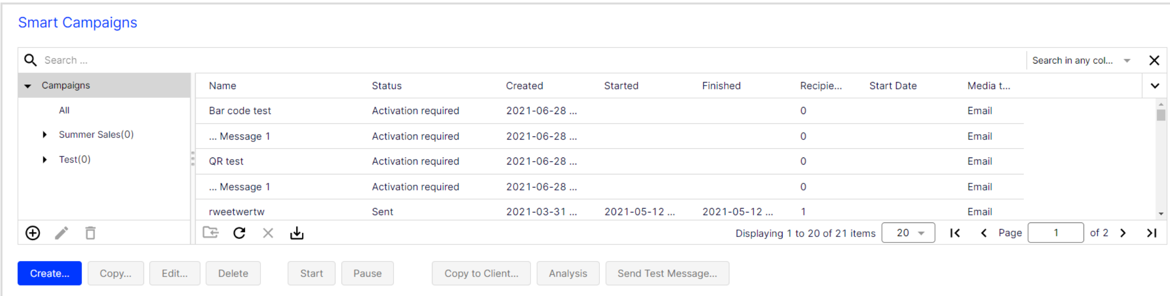
> **Note:** Mailings Classic and Reports are not included. You can still access Mailings Classic and Reports via the classic user interface.

- **Campaigns**. Tools for creating campaigns, for example, in Smart Campaigns and Marketing Automation.
- **Recipients**. Manage your recipients and target groups.
- **Responses**. Manage and act upon direct replies from your recipients, auto-responders, and bounces.
- **Blocklist**. Manage recipients who no longer want to receive messages.
- **Analytics**. Access reporting tools.
- **Administration**. Manage user roles and permissions, your APIs, and field functions.
- **More**. Access custom features such as e-commerce integrations and the coupon system.
- **Search**. Search for features available in the menu.
- **Help**. Access the Optimizely User Guide and see further documentation.

Lists and folders

In many areas of Optimizely Campaign, information is displayed in lists and organized in folders, such as mailings in Smart Campaigns.

> **Note:** You need permission to display all records of a recipient list, response list or blocklist; otherwise, only the first 60 records appear.



All lists in Optimizely Campaign work in the same way. A status bar at the bottom shows the number of elements on the page, the number of selected elements, and your current list position (for example, **Page 2 of 10**).

By default, each page displays up to 20 elements, although this is adjustable. If a list has more than 20 elements, display other pages by clicking **Next (>)** and **Previous (<)** in the status bar.

Customizing the list view

- **Change column width**. Drag the separator between columns to change column width.
- **Show and hide columns**. Click the down arrow in the upper right corner to determine which columns appear.
- **Arrange columns**. Click a column header and drag the column to the desired position.
- **Sort elements**. Click a column header to change its sorting from ascending to descending order. Text fields are sorted alphabetically; numeric fields by value, date fields by date.

> **Tip:** If multiple selection is possible in a list and at least one element is selected, you can click **Sort by selection** to sort the selected elements to the top of the list .

Exporting records

To export records from a list to a CSV file, click **Download** in the status bar and select the destination folder.

> **Note:** To export recipients, responses, or blocklists, you need appropriate permission.

Opening CSV files with Microsoft Excel

> **Note:** Optimizely Campaign creates CSV files in UTF-8 without BOM. Microsoft Excel incorrectly interprets the format as ISO-88591.

To correctly open a CSV file in Excel, follow these steps.

1. Open a blank Excel spreadsheet.
2. Click the **Data** tab.
3. Select **Get Data** > **From File** > **From Text/CSV**.
4. Select the file downloaded in Export records and click **Import**.
5. Set the **File Origin** to **Unicode (UTF-8)** and select **Semicolon** as **Delimiter**.
6. Click **Load**.

Updating lists

If several people are making changes to Optimizely Campaign, you can update any list by clicking the Refresh button on the status bar.

Modifying elements

If you select an element, it is highlighted, indicating that you can edit or delete it.

- **Select multiple elements**. You can select multiple list elements if a check box appears next to each item and in the header.
- **Add element**. Many lists have a button to add elements, for example **Create recipient**. Click this button to create a new row. Click a field to enter data. Click **Submit** when finished. Each new data record is automatically sorted into its correct position.
- **Edit element**. Double click a row to edit it. Click **Submit** to save changes.
- **Delete element**. Click **Delete element** to do that.

© Optimizely 2022

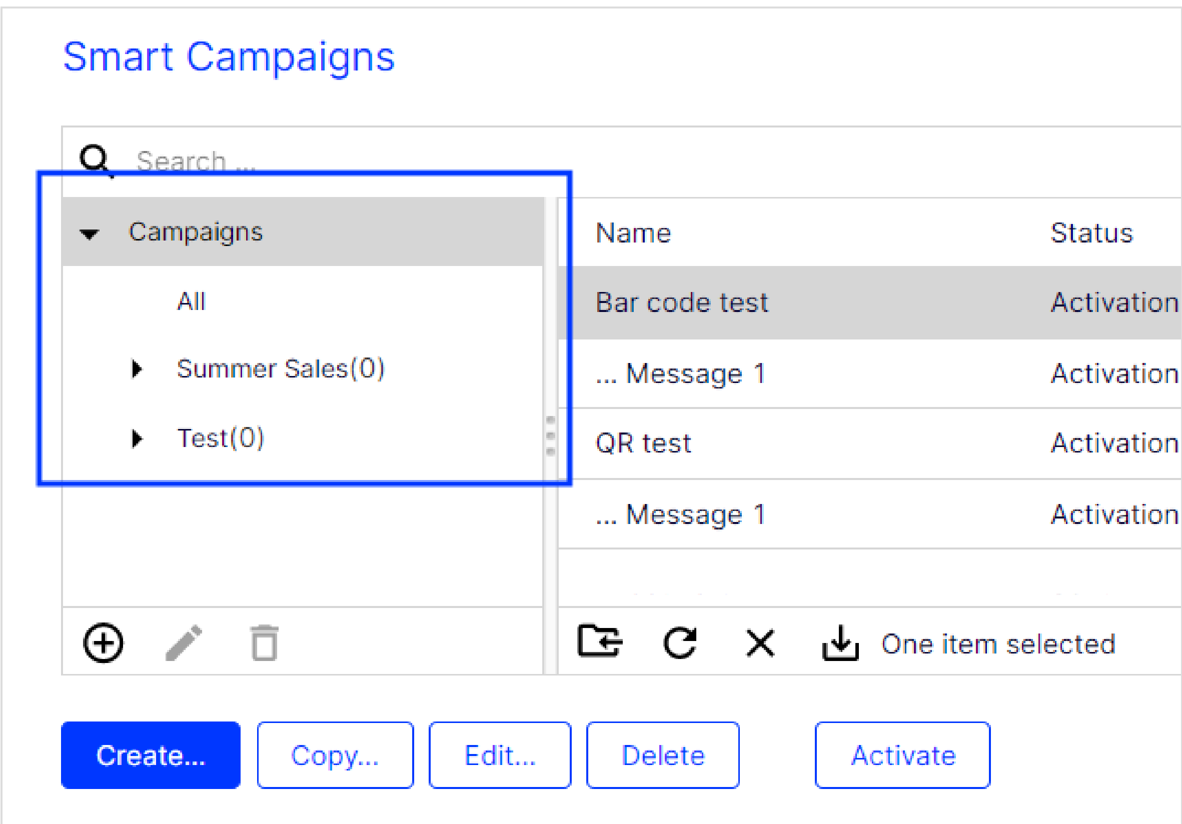
Printing lists

To print a list, click the printer icon in the status bar.

> **Note:** To print recipients, responses, or blocklists, you need appropriate permission.

Using folders

In some parts of Optimizely Campaign, such as **Smart Campaigns** and target groups, a tree hierarchy appears to the left of a main list. The additional hierarchy lets you organize elements into folders.



Drag or double click the separator bar between the two screen areas to show or hide the folders. If you hide them, the main list occupies the width of the screen.

Initially, the folder area contains only the **All** folder, a *meta folder* showing existing elements. You cannot delete the **All** folder.

Each folder displays the number of elements in it; the number does not include subfolder elements.

- **Create new folder**. Click **Add** ⊕ , enter a folder name, and click **Submit** ✓ .
- **Delete folder**. Select the folder and click **Delete** .
- **Rename folder**. Select the folder and click **Rename** .
- **Move folder**. Select a folder and drag it to the folder to which you want to move it.
- **Move one or more list elements to a folder**. Select an element, click **Move selection** and click the folder to which you want to move it.

Managing users

This topic describes how to set up and manage user accounts, and grant user permissions. User permissions apply to clients and or sub-clients. You can grant to the same user different permissions for different sub-clients (if sub-clients are being used) via roles. For example, grant the following permissions:

- Create mailings
- Edit mailings
- Send mailings
- Import recipients
- Clear recipient lists during import
- Export active recipients
- Export responses
- Export unsubscribers
- Export blocklist

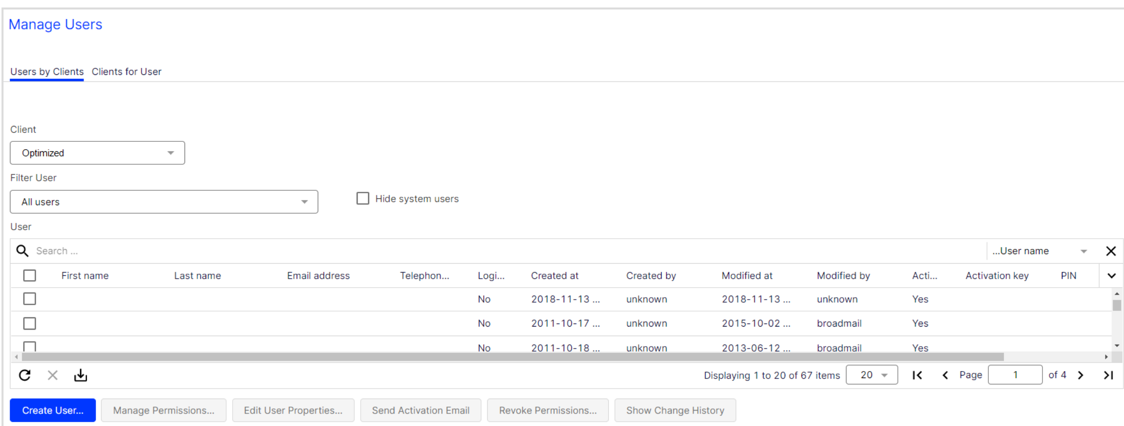
See Managing permissionsin the Optimizely User Guide for more information about how to manage access rights for other parts of the Optimizely platform.

Managing users by clients

To manage users by clients, open the Optimizely Campaign menu and select **Administration** > **Users**. The **Manage Users** window appears.

Creating users

1. In the **Client** drop-down list, select the client you want to create a user for.
2. Click **Create User...**.

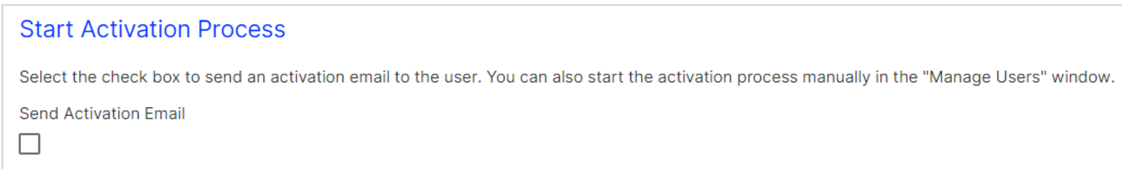


3. Enter the user's email address (which serves as the user name), language, gender, first name, last name, and telephone number.

> **Tip:** You can optionally specify allowed IP addresses and IP ranges to restrict access to the user account.
>
> Enter one or more comma-separated IP addresses. The IP address must consist of four numbers between 0 and 255 separated by a period. The IP range is limited to a maximum of 65536 different addresses. Example: 1.13.145.255,11.1.0-255.0-255.

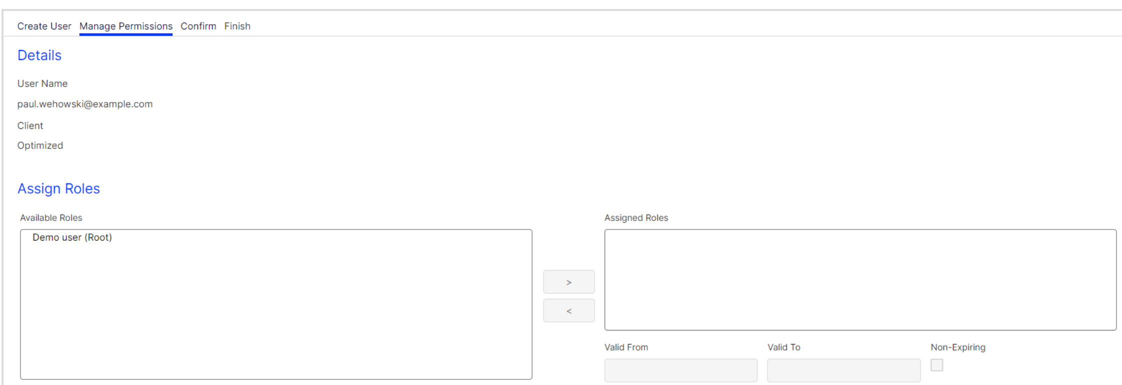
4. **Optional:** To send an activation email to the user (or to reset a user's password and PIN), select **Send Activation Email**. You can also start the activation process manually in the **Manage Users** window.

   > **Note:** To enable this feature, contact customer support.



5. Click **Manage Permissions...**.
6. In the **Assign Roles** area, you can assign one or more roles to the user.

   > **Tip:** You cannot assign or revoke individual permissions. Create a new role or contact customer support.



   a. In the **Available Roles** list, on the left side of the screen, click the roles you want to assign to the user and then click **>**.

      The following roles are available:

Role	Properties
Administrator	Has all available permissions (except for additional functions) and can create additional users.
Editor	Standard user including permission to manage recipient lists and recipient history.
Author	Editor without sending rights.
Assistant Author	Editor without sending, export and import rights.
Report Analyst	Can create and output reports with Deep Analytics. Has no other permissions.
Interface Programmer	Has access to all relevant areas for working with Optimizely's APIs.

> **Note:** You can only see and assign roles if you have all permissions for this role. You can create your own roles under **Administration** > **Roles**. You cannot assign or revoke roles that contain permissions that you do not have yourself.

   b. In the **Assigned Roles** list, select the role that you just assigned and, in the **Valid From** and **Valid To** boxes, specify the period during which the role is effective. If the role is to be assigned for an indefinite period, check the **Non-Expiring** box.

7. Click **Confirm**. A summary appears.
8. Click **Finish**. An overview of the assigned user permissions appears.

> **Tip:** The new user must activate the user account with a personal activation key. To get the activation key contact customer support.

Editing users

1. Open the **Manage Users** window.
2. In the **Client** drop-down list, select the client whose user you want to edit.
3. Select one or more users and click **Manage Permissions...**.

   > **Note:** You can only assign roles when editing multiple users. You cannot grant or revoke individual permissions.

4. In the **Assign Roles** area, you can assign one or more roles to the user.

   > **Tip:** You cannot assign or revoke individual permissions. Create a new role or contact customer support.

   a. In the **Available Roles** list, on the left side of the screen, click the roles you want to assign to the user and then click **>**.
   b. In the **Assigned Roles** list, select the role that you just assigned and, in the **Valid From** and **Valid To** boxes, specify the period during which the role is effective. If the role is to be assigned for an indefinite period, check the **Non-Expiring** box.
5. Click **Confirm**.
6. Click **Finish**.

Editing user properties

To edit user properties, such as language, gender, name or telephone number, do the following:

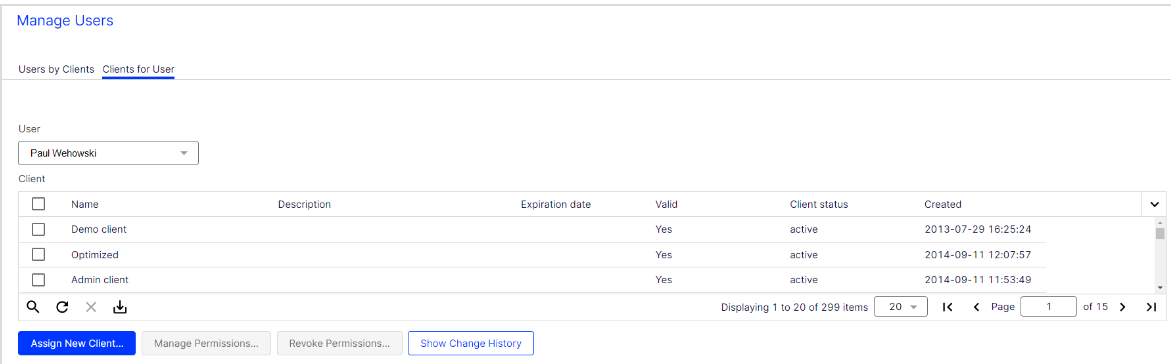
1. In the **Client** drop-down list, select the client whose user you want to edit.
2. Select a user and click **Edit User Properties...**.
3. Edit the user properties and click **Finish**.

Managing clients for users

To display the clients for which a specific user is authorized, open the **Clients for Users** tab and click the appropriate user in the **Users** list.

© Optimizely 2022

> **Tip:** To assign a *new* client to a user, click **Assign New Client…**. The **Manage Permissions** window opens.



To edit an *existing* client, select one or more client check boxes that you want to assign to the user.

1. Click **Manage Permissions…**.
2. In the **Assign Roles** area, you can assign one or more roles to the user.
   a. In the **Available Roles** list, on the left side of the screen, click the role you want to assign to the user and then click **>**.

      > **Note:** You cannot assign or revoke roles that contain permissions you do not possess yourself.

   b. In the **Assigned Roles** list, select the role that you just assigned and, in the **Valid From** and **Valid To** boxes, specify the period during which the role is effective. If the role is to be assigned for an indefinite period, check the **Non-Expiring** box.
3. Click **Confirm**. A summary appears.
4. Click **Finish**. A summary appears.

> **Tip:** You cannot assign or revoke individual permissions. Create a new role. If you require additional permissions for your work with Optimizely Campaign, or if you need permissions for additional clients or sub-clients, contact an administrator or customer support.

Managing roles

This topic describes how to manage roles. A role is a permission profile you can assign to individual users. A role may contain the same permissions as an individual user. Permissions cannot be inherited, as in user management.

In your client, you can define roles for specific tasks or projects to simplify the process of managing individual users. After defining a role, you can assign it to a user permanently or for a specified period of time, for example, for holiday replacements or temporary users.

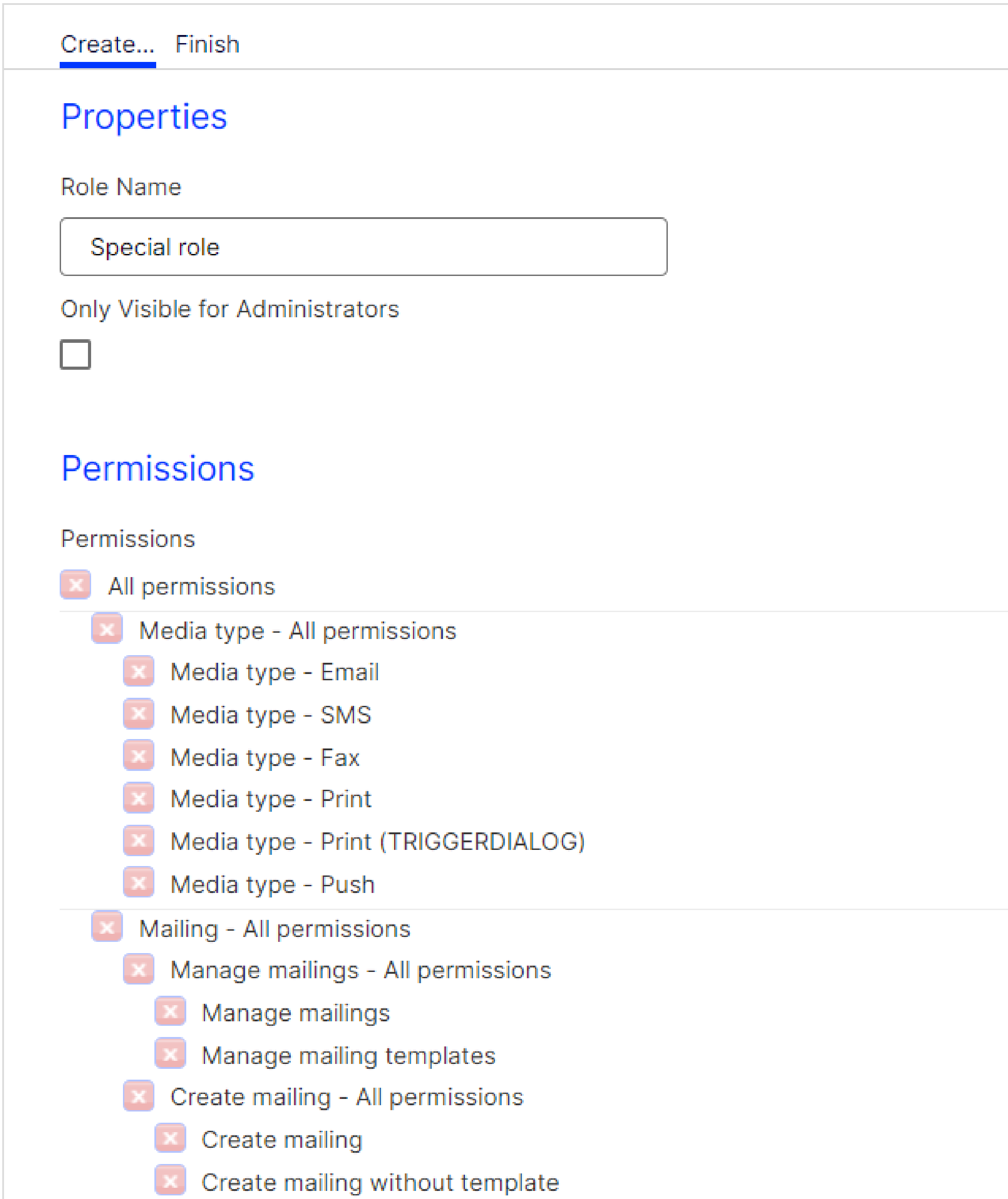
> **Note: Permissions in roles do not apply if**
>
> - A permission is explicitly revoked from the user.
> - A main permission is explicitly revoked from the user, and this is inherited to the sub-permissions.
> - A main permission, that is inherited to the current client, is explicitly revoked from the user in a main client.

To manage roles, open the Optimizely Campaign menu and select **Administration** > **Roles**.

Creating roles

> **Tip:** If you create roles in a client with sub-clients, these roles automatically apply to the sub-clients.

1. In the **Roles** window, click **Create...**.



2. In the **Role Name** field, enter a name for the role.

3. In the **Permissions** area, click the permission you want to assign to this role.

> **Tip:** You can only assign permissions, not revoke them. In other words, roles contain only positive permissions.

4. Click **Create**.

Editing roles

> **Note:** If you change a role that is assigned to one or more users, the change immediately affects those users.

1. In the **Manage Roles** window, select a role and click **Edit...**.
2. In the **Permissions** area, click the permission you want to assign to this role.

> **Tip:** You can only assign permissions, not revoke them. In other words, roles contain only positive permissions.

3. Click **Save**.

Deleting roles

> **Note:** You can delete a role only if no users are assigned to it. To see how a role is being used, click **Show Usages**.

1. In the **Manage Roles** window, select a role and click **Delete**. A confirmation window opens.
2. Click **OK**.

Showing usages

In the **Manage Roles** window, select a role and click **Show Usages**. The **Role Usage** window opens, displaying a list of users who are assigned this role.

© Optimizely 2022

> **Tip:** You can also use this window to edit a user's permissions. To do so, select a user and click **Edit User Permissions...**. Next, follow the steps described in Users.

Clients

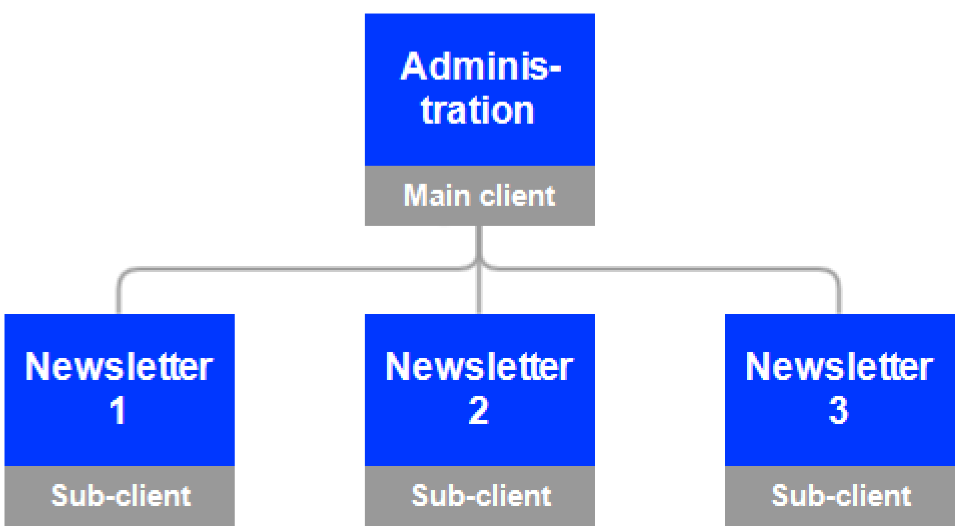
A client is the working environment of Optimizely Campaign; a stand-alone and closed system that organizes your mailings. You can use one or more clients.

Client hierarchy

When using multiple clients, you can assign each to a different tier or organize them hierarchically.

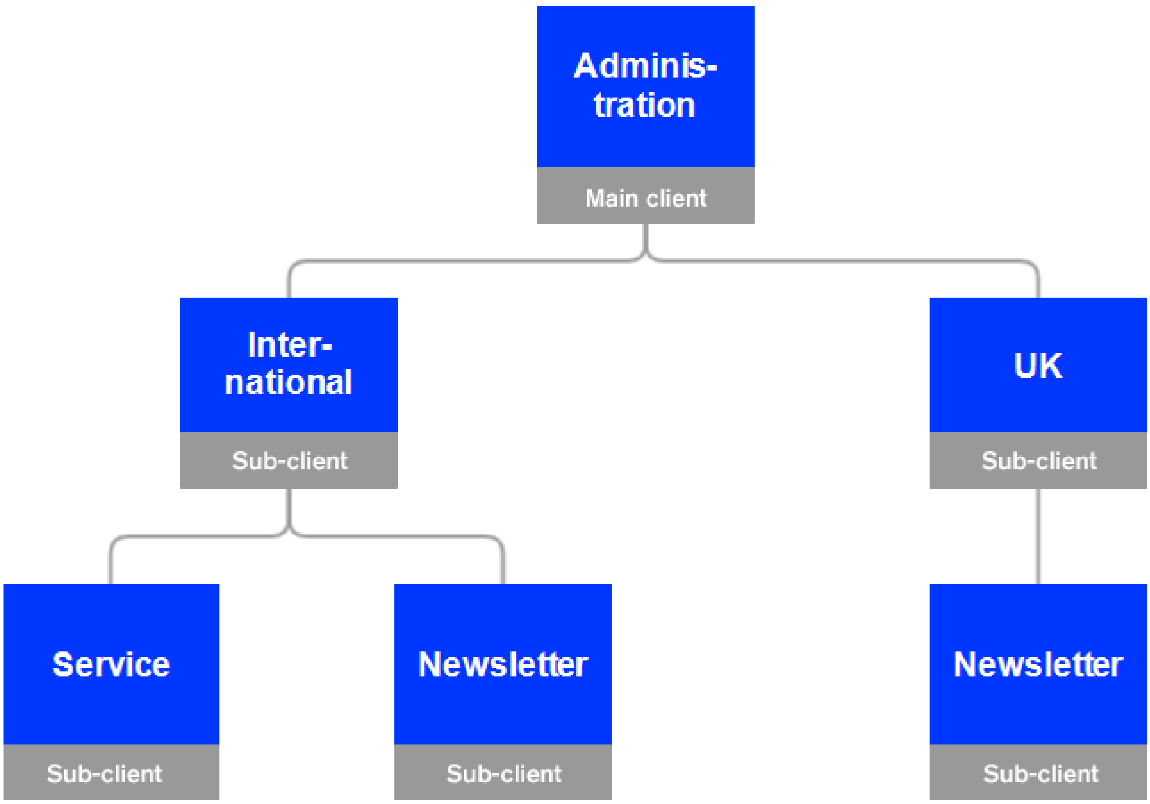
Coordinated clients

If you set up multiple clients on a single tier, you should create a main client for rights management purposes. This setup lets you centrally control user access rights to clients.



Subordinated clients

You can organize clients hierarchically. Each client inherits access rights and any blocklist from its parent clients.



Single versus multiple clients

Each user has client-wide permissions, which enable the user to view and edit the client's mailings and recipient lists.

If you publish several newsletters and different editors work on them, create different clients so that editors can only change content for which they are responsible.

The following tables list the advantages and disadvantages of working with single versus multiple clients.

© Optimizely 2022

User

Theme	Single client	Multiple clients
User	If you manage several brands in a single client, a user working on one brand can access mailings for other brands within the client.	If you manage each brand in a different client, users working on a brand only see its mailings.
User rights	Apply to entire client. Depending on the scenario, you can allow or prevent access to recipient lists or mailings.	Inherited by sub-clients. To define user rights separately for each user, contact customer support.

Recipients

Theme	Single client	Multiple clients
Recipient lists	You can send different newsletters using different recipient lists. For example, a recipient list can represent a brand, country, or business unit.	The possibilities increase accordingly with multiple clients.
Blocklists	Blocklist entries apply to an entire client. This functionality cannot be changed.	Blocklist entries are inherited by, and apply to, sub-clients. This functionality cannot be changed.
Subscription cancellations	Subscription cancellations apply to the entire client. To adjust this functionality so that cancellations only apply to the recipient lists concerned, contact customer support.	Cancellations generally apply to individual clients.
Bounces	Recipients that exceed the bounce limit are removed from future sending attempts for the entire client. This functionality cannot be changed.	Also applies if multiple clients are in use.

Domain

Theme	Single client	Multiple clients
Sending domain	You can use only one sending domain in a client by default (for example, @example.de). To modify this functionality to use many sending domains (with a tracking domain), contact customer support.	Each client can use its own domain with a respective tracking domain.
Tracking domain	In principle, you can only use one tracking domain per client. This functionality cannot be changed.	You can use an additional tracking domain for each additional client.

Mailing

Theme	Single client	Multiple clients
Field functions	Field functions can be used by default.	Field functions can be inherited by sub-clients by default. To adapt each field function separately, contact customer support.
Deep Analytics	You can create reports from within a client.	You can create reports from within a master client for sub-clients.

Client setup

The client setup includes the following tasks and topics:

- Recipient lists
- Users
- Templates
- Field functions
- Report templates

© Optimizely 2022

- Bounce handling
- Dispatch domain
- Opt-in processes
- Unsubscribe link
- Web forms
- API (application programming interface) access
- Post-click tracking
- ...customizations and add-ons

For each new client, Optimizely runs a mandatory, random check of recipient records. The dispatch is only enabled after this check, but you can use other client functions before the check is finished.

Setting up sub-clients and additional clients

If you have a Optimizely Campaign client and want to set up another client (or sub-client), contact customer support to discuss which settings can be inherited or copied from the existing client to speed up the process.

Deliverability basics

This section provides basic information and best practices for a successful deliverability.

Email can be personalized, automated, tested, measured and more. Email marketing is still one of the most effective options to marketers, especially when they tap into the best practices for enhancing deliverability.

Delivery vs. deliverability

Email delivery refers to the successful delivery of an email to the receiving server.

Email deliverability refers to the ability to deliver email to the intended recipient’s inbox.

It’s possible to have good delivery but poor inbox placement, because the email lands in the spam folder rather than the inbox.

Key figures of deliverability

An email is bounced when the receiving server, mostly the ISP (internet service provider), rejects it. Based on the error message the receiving server sends back, the rejection can either be a **soft bounce**, which is a temporary error, such as mailbox full, spam related, or time out; or a **hard bounce**, which is a permanent error, such as the email address is no longer valid.

Optimizely Campaign has an overall delivery rate of 99.8%. Without knowing what percentage of emails arrives in the inbox and what percentage in the spam folder, Optimizely can make inferences by analyzing key metrics for the emails.

The following measures give marketers insight about the reaction and engagement of their audience.

- Bounce rate

```
               Bounces
=    -------------------------  x 100%
       Number of sent emails
```

> **Tip:** Depending on the business model, it is recommend to keep the bounce rate under 3%.

- Open rate

```
        Number of opened emails
=    -------------------------------  x 100%
       Number of delivered emails
```

- Unsubscribe rate

```
         Number of unsubscribes
=    -------------------------------  x 100%
       Number of delivered emails
```

> **Tip:** Generally, an unsubscribe rate below 0.5% is good for an email campaign.

© Optimizely 2022

- Click-trough rate

```
        Number of click-throughs
=    -------------------------------  x 100%
      Number of delivered emails
```

  An email click-through is defined as the number of recipients who click links in an email and land on the sender's website, blog, or other desired destination.

- Spam complaints: Reports made by email recipients against emails they do not want in their inbox.
- Spam trap hits
  - **Recycled spam traps** are email addresses that were used by a person and then abandoned. Typically, if an email address has been dormant for the last year, many ISPs convert it into a spam trap.

    Sending to recycled spam traps shows that you have poor list hygiene, or you are not removing unengaged users.

  - **Pristine spam traps** are set up by ISPs and anti-spam organizations in order to catch spammers. No one should be sending email to those addresses.

Marketing opt-in

There is a big difference between having a list of email addresses and having permission to email to that list. There are three types of permissions:

1. **Single Opt-in (SOI)**: the interested party leaves his email address in a form, which is considered explicit consent to receive email newsletters regularly.
2. **Confirmed Opt-in (COI)**: after a single opt-in, an email is sent to subscriber’s email address as confirmation of the registration.
3. **Double Opt-in (DOI)**: after single opt-in, an email with a confirmation link is sent. To complete the subscription process, the subscriber must verify the registration by clicking the link.

Sending email to non-permission-based lists results in high bounce rates, low open rates, high unsubscribe rates, high spam complaints and high spam trap hits, all of which indicate an unsuccessful email.

For more information on the opt-in method, see Opt-in.

Sender reputation

Having the ideal ratio of text to images, considering the placement of the content elements, using an eye-catching font, personalizing the content for the target audience, and selecting the optimum sending frequency are all key factors in a successful email. However, all that effort is wasted if the intended audience never opens the email because it does not reach their inbox.

Filtering mechanisms are becoming increasingly sophisticated in determining if an email is important, junk or spam. Some check the content, while others focus on the recipients' engagement. However, from an ISP's perspective, the sender's reputation plays a greater role in the analysis.

Here are typical factors that determine a sender's reputation:

- Total number of emails sent
- Number of emails sent to invalid email addresses
- Number of recipients who mark the emails as spam
- Domain from which the emails are sent
- Whether this domain has authentication records
- IP address from which the emails are sent
- whether the IP address is blocked anywhere
- whether the IP address is dedicated
- whether the IP address has authentication records

Email authentication

Authentication allows the mailbox provider to confirm that the sender is the one who he pretends to be. There are four primary methods of authentication:

1. **Reverse DNS**, which implies determining which host and domain name belong to a given IP address. If a Reverse DNS Lookup returns a *no domain associated*, the email will likely bounce to the sender, or be deleted or filtered. This entry is set by default on the Optimizely sending infrastructure.

© Optimizely 2022

2. **SPF** is Sender Policy Framework, which states which IPs are authorized to send on behalf of the "From" domain. SPF allows the receiver's host to verify that the email is being sent from the server it asserts it is sent from.
3. **DKIM** is Domain Keys Identified Mail. The recipient uses this to determine that the message has not been altered in transmission. The public and private keys must match to ensure that nothing happened to the message in transit.
4. **DMARC** is Domain-Based Message Authentication, Reporting, and Conformance. DMARC ensures that the legitimate email is properly authenticating against established DKIM and SPF standards, and that fraudulent activity appearing to come from domains under the organization's control (active sending domains, non-sending domains, and defensively registered domains) is blocked.

List management and hygiene

Marketers must ensure their emails are sent to an interested audience and, at the same time, care about the audience experience.

It's important to nurture new subscribers and make them feel welcome, while also rewarding active subscribers and maintaining their interest.

It's also important to regularly check in with less active subscribers and give them the opportunity to re-engage or opt out. If left unchecked, the number of inactive people will grow. Continuing to send emails to them will negatively affect the sender's reputation and impact deliverability, even to active subscribers.

So, the best way to segment the recipient list is by engagement level.

- Sending to highly engaged recipients frequently, even on a daily base.
- Sending less frequently to less engaged recipients.
- Using reactivation campaigns to recipients who have not been engaged for 3-6 months.
- Blocklisting recipients who complained that the email was spam.
- Deactivating recipients who did not engage within a certain amount of time (1 year, 20 months and so on). Do this once a year.

Constantly monitoring the activity and engagement level of subscribers allows marketers to better understand what the subscriber wants and tailor emails to cater to their needs.

For more information and best practices, see:

- **Deliverability best practices**
- **Email content best practices**
- **Sender reputation guide**
- **CSA guidelines**
- **IP warming**
- **Email authentication and encryption**
- **Blocklists and blocklisting**
- **SMTP codes and error messages**
- **DMARC implementation**
- **List bombing**
- **BIMI piloting**
- **Deliverability glossary**

Deliverability best practices

Good deliverability is no coincidence. High delivery and open rates are mainly a result of the general email marketing strategy and the associated adherence to industry best practices. After all, what is the point of fancy features if the email is not delivered and the recipient never sees it? The following is an overview of best practices as represented by internet service providers (ISPs) and valid in the email sector.

Clean contact acquisition process

Use contacts who actively signed up to receive your promotional mailings. This is legally required and provides the best delivery rates, as you would expect the best user engagement from them.

Avoid recipient sources such as purchased lists, lead generation, or affiliate marketing partners, as the quality of contacts is often poor, legally non-compliant, and negatively impacted by lack of concrete opt-ins and questionable acquisition methods.

© Optimizely 2022

Clear expectations from the beginning

- At the time of collecting his email address, is the recipient aware of what kind of commercial emails you will send?
- Lack of clarity can lead to poor open rates and spam complaints.
- Let the recipient actively manage preferences and desired frequency, for example by means of a preference center.

Double opt-In

A double opt-in process is the only way to protect your database from unauthorized third-party registrations, as recipients are actively verified by clicking the activation link in their email account. Spam traps can be prevented from being introduced into the database as no confirmation click is expected from them. Storage and documentation of the complete registration data as required by the GDPR (general data protection regulation) legislation can only be guaranteed by a double opt-in process.

For more information on the double opt-in process and how to implement it with Optimizely Campaign, see Opt-in.

Registration forms with Captcha

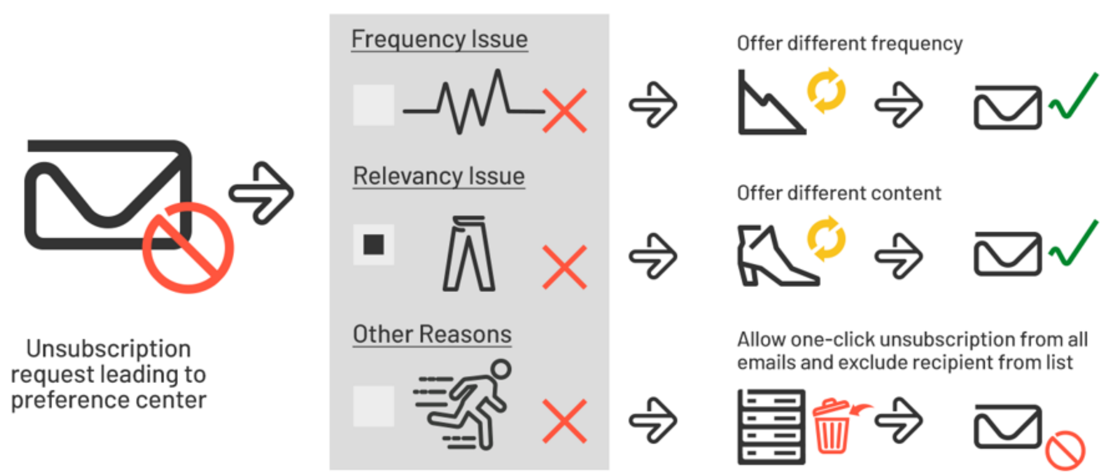
Captcha is the best way to protect your registration forms against misuse. Especially in the age of bot and list bombing attacks, it has become indispensable. Integrating a Captcha protects your database from malicious addresses and the systems involved against DDOS attacks.

Your recipients attach great importance to data protection and will understand this as a confidence-building security measure.

User-friendly unsubscription process

An easy-to-find unsubscribe link should be present in every commercial email. A recipient's opt-out request of should be respected. You should allow the unsubscription from any marketing communication through a maximum of two clicks: on the link itself and, if necessary, a second time in a preference center.

Refrain from requesting additional logins or sending unsubscribe confirmation emails, as these may lead to frustration and spam complaints.



List hygiene

- Each contact should be sent to at least once every 6 months to sustainably clean up the database and avoid a high number of hard bounces.
- Exclude recipients who were not active in the newsletter in the last 12 months from regular mailings. These email accounts might be converted into spam traps by the ISPs after that amount of time.
- Legacy data often results in low open rates and, related to that, a loss of good deliverability performance.

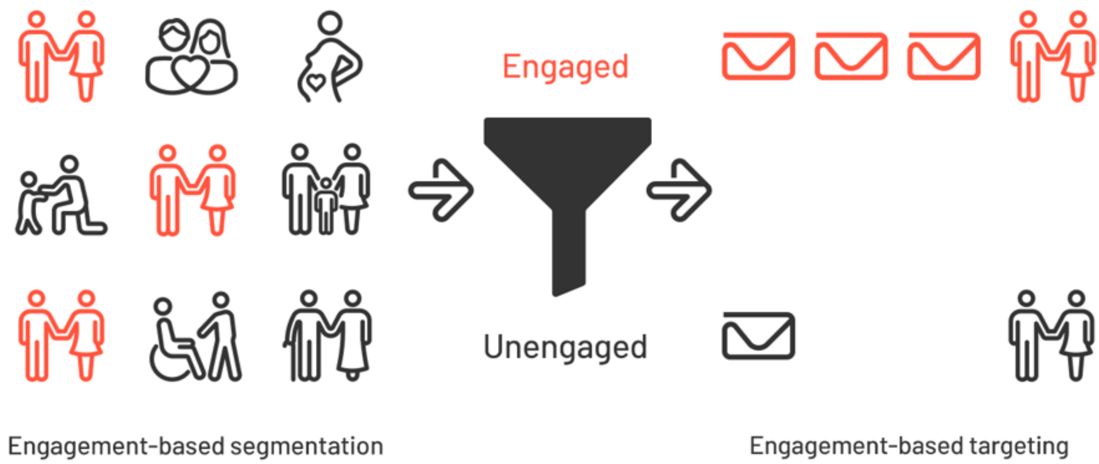
Focus on engaged recipients

Your email marketing activities should focus on your active recipients because they are responsible for good open and delivery rates, and also form the basis of your revenue generation. These include contacts who were recently active in your emails, on your website and other channels; recipients who opened and clicked several times; and users who browsed your website and bought products from your shop. Only they should receive email from you regularly.

Exclude and reactivate inactive users

Exclude from the regular newsletter contacts who do not open for a long period of time. Lack of feedback leads ISPs to believe that your emails are uninteresting or even unintentional to the major part of your recipients, and they may punish you with spam folder delivery.

Inactive recipients, however, may occasionally be sent to with winback campaigns.



Relevant content through segmentation and personalization

- Take advantage of Optimizely Campaign's segment feature and work with as many target groups as possible.
- You can generally apply filtering to many areas, such as user engagement, regions, interests, purchased products and age groups.
- Do not only send the same mailings exclusively to the complete database. Variation leads to more relevant content and thus better email performance KPIs.
- Irrelevant content causes poor open rates, unsubscriptions, and spam complaints in the long term.

Transparent mailing content

Your emails aim to build a relationship of trust with your brand. Therefore, they should contain an unsubscribe link, a link to the privacy policy, and a full legal imprint.

Email content should look trustworthy not only to the recipient but also to the ISP and its spam filter. Therefore, make sure your emails are not empty, do not contain any phishing-like links, and that you have an appropriate HTML / text ratio and identical HTML and text versions.

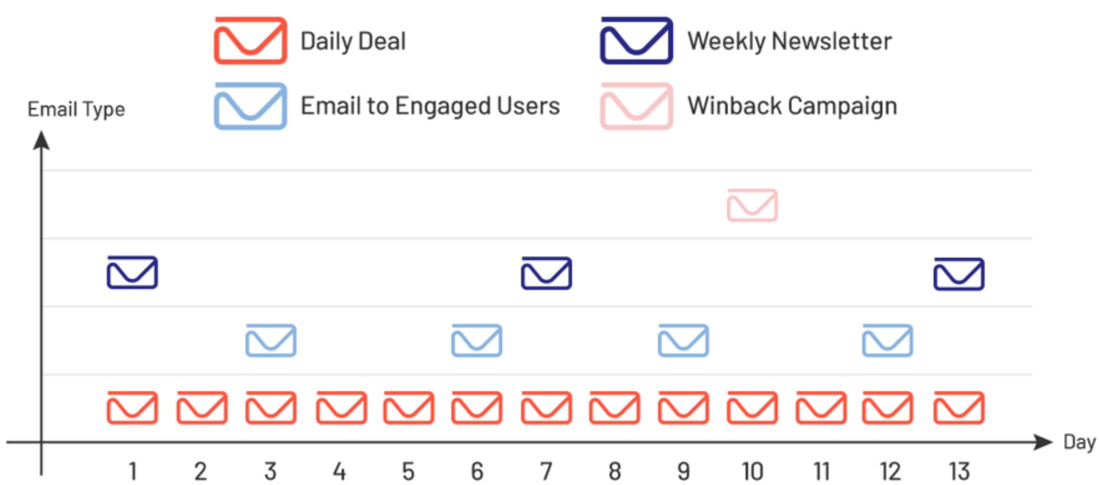
© Optimizely 2022

Tip: To learn how email content affects your email deliverability and how you can improve your content strategy, see Email content best practices.

Adequate frequency

Adjust the sending frequency to your business model, but do not overwhelm your recipients. Bombarding recipients with emails can lead to high levels of spam complaints, unsubscriptions, and public complaints in anti-spam forums, which have a negative impact on your sender reputation and deliverability.

Be clear about how often your newsletter will be sent, comply with it, and give your recipients the opportunity to adjust frequency according to their needs.



Stable sending volume

Heavily changing sending volume is a typical characteristic of spammers. Since the emails of ordinary senders might be also misclassified in such cases, avoid large irregularities of the volume sent. If you need to send much larger quantities of emails due to seasonal requirements, a slow and steady increase is recommended.

Email content best practices

Creating good email content increases the general success of the ability to maintain good inbox placement. ISPs (internet service providers) protect their users by using spam content filters, which work by analyzing a message before it is sent to the recipient's inbox.

Spam filters are used by ISPs to score incoming messages based on algorithms that find thousands of characteristics, misspellings, the similarity of words that occasionally show up within the spam folder. Legitimate emails can end up into the spam folder if their messaging contains any similar characteristics or commonly used tactics by spammers.

Refining your content to industry standards will allow you to stand a more robust chance of reaching the inbox.

This topic describes how content affects your email deliverability and provides insights into how you can improve your content strategy. Following some best practices can facilitate a successful email campaign, some smart rules include:

HTML syntax errors

Using out-of-date or invalid code will influence if your emails are accepted by domains like Hotmail, Gmail and AOL are blocked or delivered to the spam folders.

Your finished email might render well among these ISPs but if the hypertext mark-up language email doesn't comply with W3C standards (World Wide Web Consortium) you may find deliverability problems. HTML syntax and formatting errors are common tricks spammers use to get past content filters.

Text image ratio

ISPs often block emails that contain only images as a means to fight against spam. Image only emails have been known to have higher abuse complaints, higher bounces, lower email engagement. The most common used guideline is no more than 40% image and a minimum of 60% text.

© Optimizely 2022

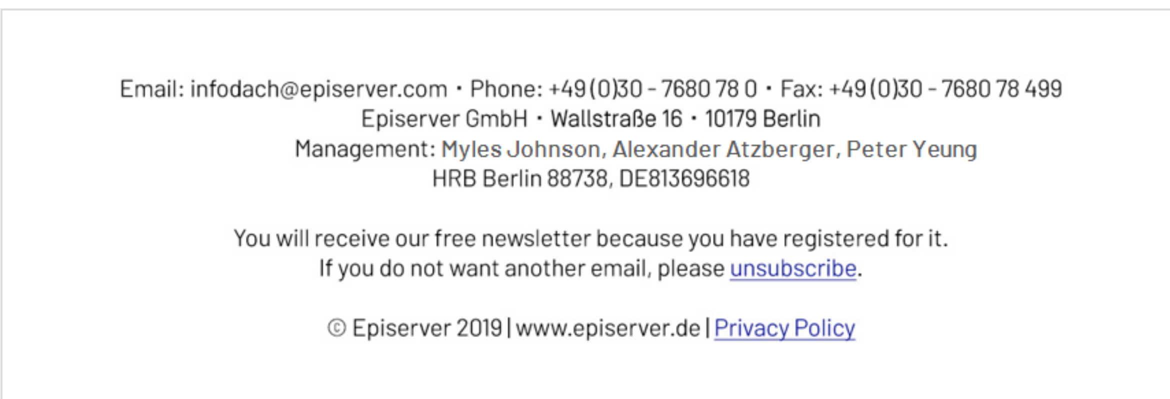
Unsubscribe link

Including an unsubscribe link within your email is a fundamental rule for email marketing. The unsubscribe link should be clearly visible, with a one or two click process, allowing the recipient to remove themselves from the database instantly. If a recipient is unable to find your unsubscribe link, they are more likely to click the “this is spam” button, which can lead a mark being left on your sender reputation.

Privacy policy page and imprint URL

A privacy policy is a legal requirement for all websites that collect or use personal information from users. Adding a privacy policy link to the intended recipient destination shows ISPs that you are a sender that complies with regulatory guidelines.

Adding an imprint to your email template maintains transparency, it is recommended to include name of the authorized sender, email address, phone number, postal address and business registration number to the footer of your emails.



Email: infodach@episerver.com • Phone: +49 (0)30 - 7680 78 0 • Fax: +49 (0)30 - 7680 78 499
Episerver GmbH • Wallstraße 16 • 10179 Berlin
Management: Myles Johnson, Alexander Atzberger, Peter Yeung
HRB Berlin 88738, DE813696618

You will receive our free newsletter because you have registered for it.
If you do not want another email, please unsubscribe.

© Episerver 2019 | www.episerver.de | Privacy Policy

Attachments

Adding email attachments as a bulk sender are prohibited, doing so will flag your emails as spam. Attachments are often used to hide malware and viruses. ISP tend to block emails containing attachments to protect recipients and infrastructure.

Avoid spammy words and phrases

ISPs have become smarter about how they distinguish a spam email from a legitimate email by scanning spam words and phrases. As an email marketer doing adequate testing before a send and removing common spam words from your copy such as *Click here!* or *Free* can assist in better inbox placement. A good way of knowing what to exclude is to review the content within your personal spam folder.

An example of spammy content include:

- Excessive use of exclamation points
- Dear Friend
- Order Now, Risk-Free
- Discount
- Offer
- Sale, Buy, Free, Cheap
- Keep the following signs to a minimum: **?**, **%**, **$**
- Exclude the use of ALL CAPS
- The use of bright red/green colored fonts

Link shorteners

Link shorteners are appealing since they make your links more manageable, but in reality, using such tools increases the chance of your emails being flagged as spam. The reason behind this is that link shorteners mask your destination URL, this technique is often used by spammers to prevent recipients and the ISPs from knowing your actual website domain.

Avoid mismatched URLs

Mismatched URLs are a clear sign of a phishing attempt, avoid looking like a phisher by removing unintentionally mismatched URLs. This occurs when the link text is a URL and does not match the URL in the link HREF that the recipient is directed to.

© Optimizely 2022

Remove blocked URLs

Domains listed on blocklists should not be used. If it is a client's domain, then the client should investigate with his domain host. If it is a third-party domain the client links to (for example *tumblr.com*), it should not be used anymore due to a bad reputation.

Plain text version

There are many good reasons to include a text version of an email, in the event that HTML version is not accepted or cannot be rendered, the message will still be able to be displayed in text format. Text versions should be identical with the HTML version in terms text content and links.

Domain alignment

All domains that you use for sending, tracking or in e-mail content should be aligned. You can set up the alignment in *relaxed* or *strict* mode. Both modes are accepted throughout the industry and prevent emails from being classified as spam or phishing attempts by spam filters and at the same time create more trust on the recipient side.

With *relaxed* domain alignment, the domains used must be the same, at least at the organizational domain level. Example for *relaxed* domain alignment:

Visible sender domain	Technical return path domain	Tracking/image domain	Domain in email content
example.com	mail.example.com	tracking.example.com	shop.example.com

With *strict* domain alignment, the domains must also be aligned at the subdomain level. Example for *strict* domain alignment:

Visible sender domain	Technical return path domain	Tracking/image domain	Domain in email content
mail.example.com	mail.example.com	mail.example.com	mail.example.com

© Optimizely 2022

Using similar but not exactly the same domains, such as *mail-example.com* or *exampleshop.de*, is strongly discouraged. For a spam filter, these give the impression that they are part of a spamming or phishing campaign and can have a negative effect on delivery.

Bad content creates low engagement

The messaging within your emails also has an influence on your inbox placement, it is essential to ensure that you are sending email content that your recipients want to read. ISPs will analyze how engaged your recipients are by looking at opens, clicks, bounce rates, unsubscribes, and spam complaints. Low performing emails are usually sent to the spam folder. Good practices to keep your recipients engaged include providing personalizing content based on your recipient's needs, adding CTA (call-to-action) points, keeping subject lines short, content messaging less salesy, segments, personalization, and dynamic content.

A/B testing is an important technique that can help you understand, how your recipients respond to different content, and which campaigns are most effective with engagement metrics. See A/B test (Optimizely Campaign) and A/B testing in the Optimizely CMS section.

Other recommendations

- An email message size should be less than 200 KB in general. Redundant code, increased image sizes, template height /width can influence the overall size of your email. (Email size to Gmail should be a maximum of 102 KB.)
- The subject line should have a maximum length of 50-60 characters.
- Add a comment to your emails, requesting your recipients to add your email address to their safe senders list.
- Remove any iframes from your templates.

In conclusion, we have seen that content influences not only the value to your recipients, but following the above tips, improves your ability to gain better inbox placement and a better performing sender reputation as ISPs start to trust you as a bulk sender.

© Optimizely 2022

Sender reputation guide

Keeping your reputation is the most important part of sending emails. As a sender, you want to gain high performance and inbox placement. Sender reputation is how ISPs measure the trustworthiness of a senders IP or domain, by analyzing a variety of metrics. ISPs use sender reputation to determine whether an email should be accepted via inbox and spam filter placement.

This topic describes how to achieve and keep up a good sender reputation. Before moving on, it is of help to understand the basics of email and spam filtering.

Email filtering and spam filter systems

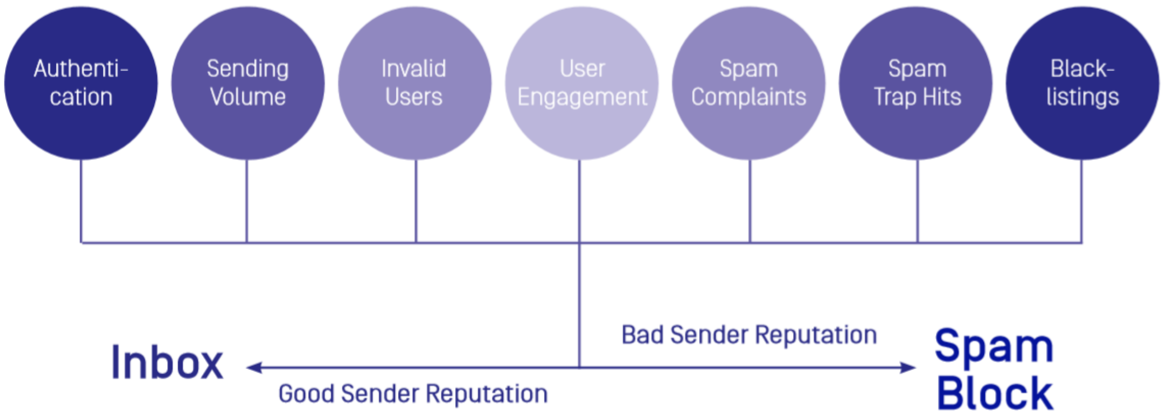
Email filtering is a technique to filter a server's inbound and outbound email traffic. This technique is used by ISPs and organizations such as your internal IT department to filter and scan messages sent to their recipients. The spam filter systems have a various amount of classifications for incoming mail. Some include virus, adult content or spam, among others.

Most spam filter systems have the ability to perform the following:

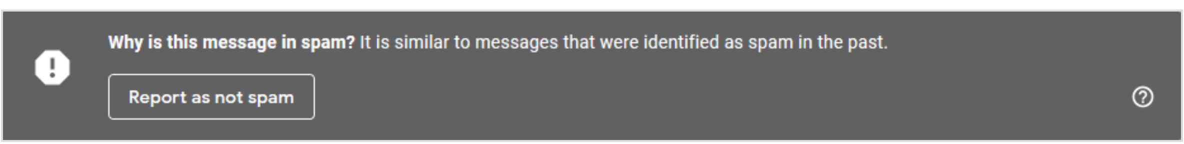
- Allow or decline incoming mails based on history of IP sending analysis, engagement activity and Realtime Blocklist listings.
- Allow or decline emails coming from IPs that have/have not been allowed. The majority of ISPs no longer support IP allowlisting.
- Antivirus support to prevent mailings from entering the recipient’s inbox that have malicious code/attachments.
- Allow or decline emails based on content analysis. These systems use their own internal algorithms to block mailings based on words used, attachments sent or HTML syntax concerns to name a few. For more information on how to avoid content flaws, see Email content best practices.

Developing a sender reputation

Reputation is primarily based on your businesses sending behavior, and how your recipients engage with your email. Think of it like having a credit: if you do not follow the best practices, for example paying on time and keeping low debts, this will negatively impact your credit score, leaving you unable to gain certain financial benefits. In the same way, ISPs will rate you based on your sending behavior.



Email service providers and email filtering systems work together to monitor sending of unwanted email in order to reduce email spam.



Your data is an important part of your reputation and the way you attained your marketing list is one of the main factors that can affect your sending reputation. If you are sending to a list with inactive email addresses (for example closed email accounts, typo addresses, spam traps) you will experience future reputation issues.

It is essential to always send a double opt-in confirmation email before sending to a list, where there is a high possibility of inactive addresses. Marketers with a good data list will see good sender reputation and inbox placement, and those with poor reputation will often see emails entering the spam folder or blocked entirely.

Factors that affect your sender reputation

- High abuse complaints
- Recipient engagement, opens, click-through rates performance
- Recipient list quality, including spam traps and unknown users

- Infrastructure and authentication (SPF, DKIM, DMARC)
- Content
- High unsubscribe rates
- Sending history
- Engagement
- IP permanence
- Inconsistencies in the volume of emails sent
- Number of recipients that mark your emails as spam
- Times you have hit spam traps
- Blocklisting of your IP/Domain
- Number of bounces you receive
- ISPs track engagement, low opens, reply to emails, forwards, as well as high deletes and unsubscribes

Tips for achieving good sender reputation

ISPs' main goal is to protect their users from malicious content and to accept only emails that a recipient really wants to read and engage in.

Follow these tips to achieve a good sender reputation:

- Send a welcome email to start off, a series of emails to gather an insight into your recipient's engagement behavior.
- As months pass, keep an eye on recipients who have not opened your emails yet, occasionally removing them from your recipient list.
- Ensure you are targeting your users based on information and content they would like to receive, using targeting and marketing segmentation techniques.
- Review your list hygiene process, implement form verification tools such as CAPTCHA and form validation through API. Ensure your data has been attained through a permission-based process such as DOI and stay away from third party or bought lists.
- If a recipient keeps receiving an email each day from the same sender, they will end up unsubscribing, or making a complaint. Consistency is important, review the frequency of your emails, limiting recipients from receiving no more than 1-2 emails per week.
- Send emails based on recipient engagement: Low engagement impacts your reputation. Ensure you are sending to recipients with high opens and click rates.

© Optimizely 2022

Maintaining your reputation means continuously taking a proactive step to follow best practices. If in doubt of a marketing list, avoid to send to that data. The result from a bad send could either have a negative effect on your delivery immediately or later down the line.

CSA guidelines

Optimizely is a partner of the Certified Senders Alliance (CSA) and takes part in their allowlisting program, which complies with GDPR (general data protection regulation) and ensures legal conformity of the sender's email marketing processes. CSA allowlisting offers preferred delivery and better inbox placement at participating Internet Service Providers. Participation in the program involves technical and legal standards that are decisive pillars of the program, which must be fulfilled by each sender. The following sections provide an overview of the CSA's legal standards and how to implement them.

Opt-in requirements

Newsletters based on GDPR article 6

Generally, marketing emails that contain any type of advertising and aim at a sale need the recipient's consent. Double opt-in (DOI) is a requirement for Optimizely Campaign to comply with GDPR and CSA documentation requirements because it is the only procedure that grants traceability to ensure that only authorized user can subscribe.

Product recommendations based on EU directive 2002/58/EC (41)

Alternatively, recommendations about similar products and services may be sent to customers who made a purchase without their explicit consent. However, because this type of email is usually a source of spam complaints, stricter formal requirements apply.

© Optimizely 2022

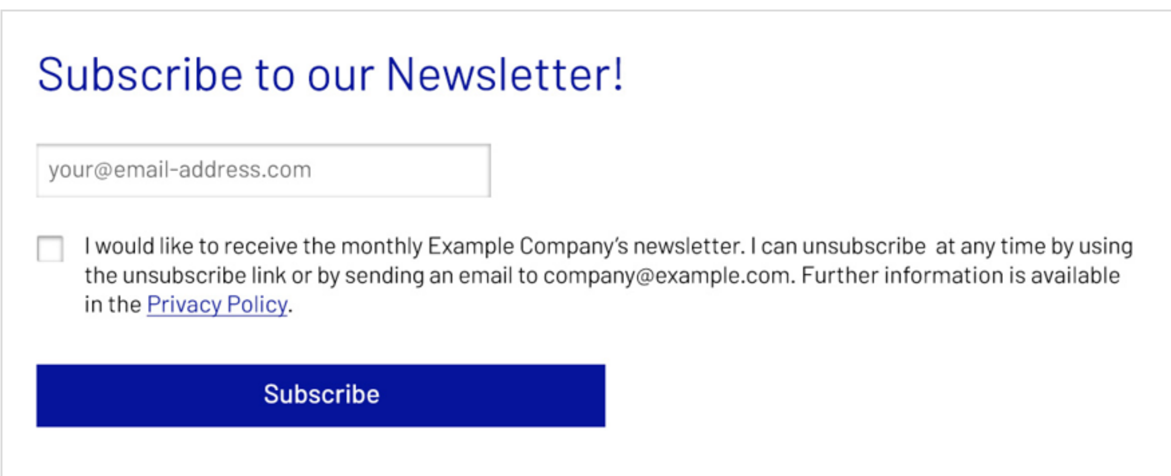
Newsletter registration form requisites

Must haves

- Consent must be given actively; pre-checked check boxes are not allowed.
- Consent must not be coupled with subscriptions to other services.
- It must be clear from whom the subscriber is going to receive what content.
- A remark indicating that unsubscription is possible at any time and by which methods, at least an **Unsubscribe** link and email address, must be clearly visible when the email address is collected.
- A maximum of 10 third parties, including sponsors, must be explicitly named.
- The email address is the only mandatory field; all other fields must be optional. (This refers to pure newsletter registration forms only; account registration or checkout forms may have more mandatory fields.)

Nice to haves

- A link to the privacy policy in every contact acquisition form.
- The recipient should be informed about the newsletter frequency.



Newsletter content

- A full legal imprint needs to be in the email footer including: physical address, email address, phone number, authorized representative and business registration number.
- Unsubscribe and privacy policy links need to be in the email footer.

Email: infodach@episerver.com • Phone: +49 (0)30 - 7680 78 0 • Fax: +49 (0)30 - 7680 78 499
Episerver GmbH • Wallstraße 16 • 10179 Berlin
Management: Myles Johnson, Alexander Atzberger, Peter Yeung
HRB Berlin 88738, DE813696618

You will receive our free newsletter because you have registered for it.
If you do not want another email, please unsubscribe.

© Episerver 2019 | www.episerver.de | Privacy Policy

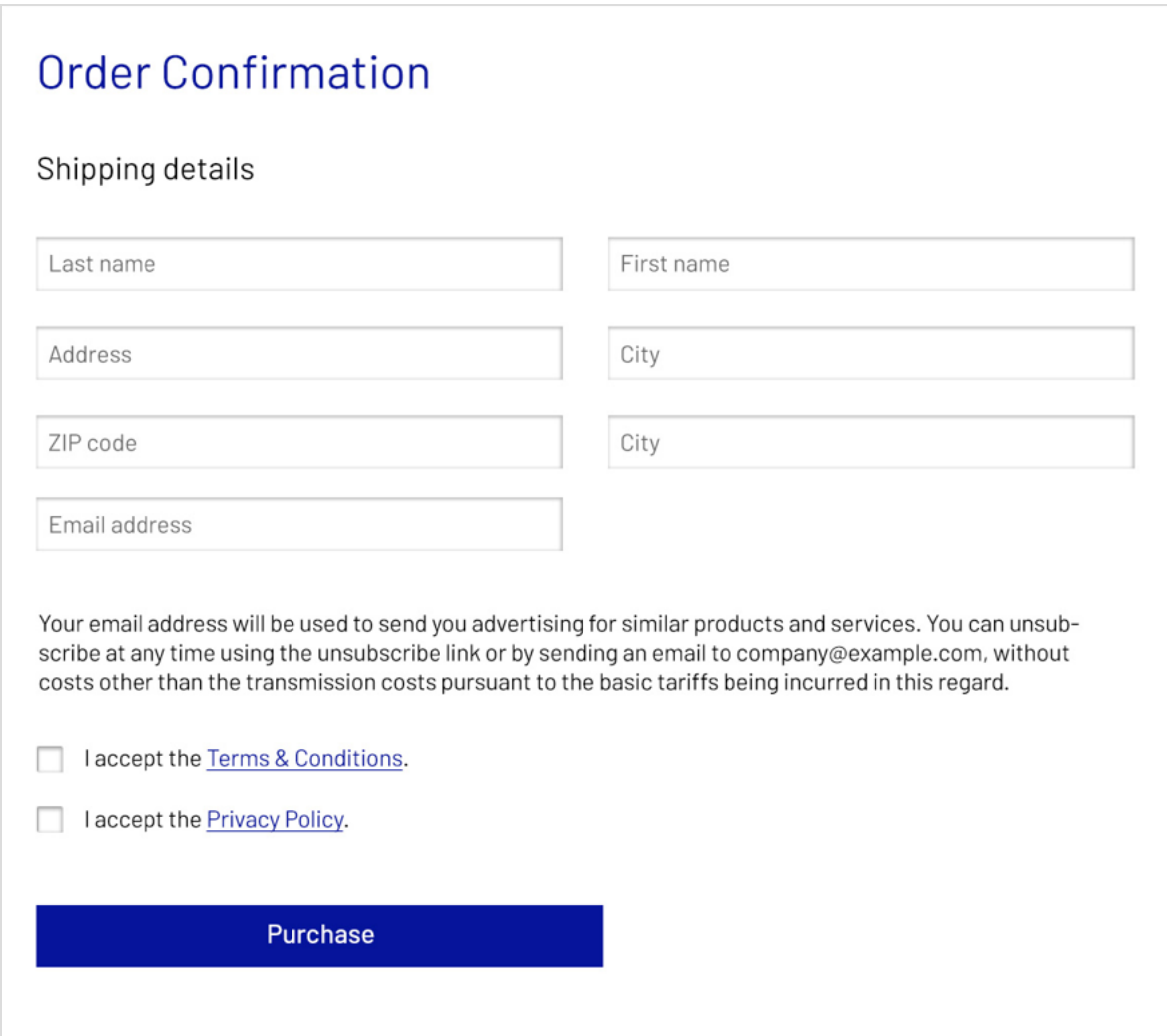
Customer relationship requisites for checkout acquisition forms

Must haves

- The address was acquired through a purchase; a transaction was made, and the product was not returned.
- The address is used for direct advertising of own similar goods or services.
- The customer has not objected to this use, meaning there was no previous unsubscribe from commercial emails.
- A remark stating that emails about similar products or services will be sent must be clearly visible when the email address is collected.
- The form must contain information that one can unsubscribe at any time “without costs other than the transmission costs pursuant to the basic rates being incurred in this regard” or similar and by which methods, at least unsubscribe link and email address.

Nice to haves

- Include a link to the privacy policy every contact acquisition form.
- Inform the recipient about the newsletter frequency.



Product recommendation content

- The products advertised need to be similar to the product purchased. “Similar” means they have the same sense and can be used in the same way. No other advertising must be included.

- A full legal imprint is in the email footer: physical address, email address, phone number, authorized representative and business registration number.
- Unsubscribe and privacy policy links are in the email footer.
- The email also contains information that one can unsubscribe from it "without costs other than the transmission costs pursuant to the basic rates being incurred in this regard".

Email: infodach@episerver.com • Phone: +49 (0)30 - 7680 78 0 • Fax: +49 (0)30 - 7680 78 499
Episerver GmbH • Wallstraße 16 • 10179 Berlin
Management: Myles Johnson, Alexander Atzberger, Peter Yeung
HRB Berlin 88738, DE813696618

You have received this email because you made a purchase in our shop. By clicking here, you can unsubscribe from further product recommendations without costs other than the transmission costs pursuant to the basic tariffs incurred in this regard.

© Episerver 2019 | www.episerver.de | Privacy Policy

Imprint requisites

- An imprint page must be present on the website and accessible.
- The imprint page must contain: physical address, email address, phone number, VAT identification number, and authorized representative.

Privacy policy requisites

Must haves

- A privacy policy page must be present on the website and accessible.
- The recipient must be informed from which sender he or she is going to receive which type of emails.

Newsletter

- A remark must be present that indicates that unsubscription is possible at any time and by which methods (at least unsubscribe link and email).
- A maximum of 10 third parties, including sponsors, must be explicitly named.

Customer relationship

- A remark stating that emails about similar products or services will be sent must be clearly visible.
- The privacy policy must contain the information that one can unsubscribe at any time "without costs other than the transmission costs pursuant to the basic rates being incurred in this regard" or similar and by which method, at least unsubscribe link and email address.

Nice To haves

- The recipient should be informed about the frequency of the newsletters or product recommendations.

> Newsletters based on GDPR Art. 6
>
> We will use your email address for sending you our monthly newsletter, including valuable information on new products and services if you actively subscribe to it. You can unsubscribe from it at any time by clicking the un-subscribe link included in every newsletter or by sending an email to company@example.com.

> Product recommendations based on UWG §7(3)(German Law Against Unfair Competition)
>
> Whether or not you subscribed to our newsletter, we will send you regular personalized recommendations on similar products and services when you have made a purchase in our shop. You can unsubscribe from the personalized recommendations at any time by clicking the unsubscribe link included in every product recommendation mailing or by sending an email to company@example.com, without costs other than the transmission costs pursuant to the basic tariffs being incurred in this regard.

Unsubscribe requisites

- Unsubscription must be easy and requires no more than two clicks.
- Unsubscription must be free.
- No further login must be required.
- No persuasive language must be used.

Registration data requisites

Must haves

- Context of contact acquisition (newsletter, customer relationship and so on).
- URL / screenshot of online registration form or scan of offline registration form / contract.
- Type of opt-in given, if applicable (double opt-in, single opt-in and so on).
- Date and time of registration, and DOI confirmation.

Newsletter

- Declaration of consent as presented when email address is collected.

Customer relationship

- Remark informing recipient that contradiction to this type of advertising is possible at any time as presented .
- Purchase data.

Nice to haves

- IP address of registration and of DOI confirmation

IP warming

New sending IPs (Internet Protocol address) have no sending history and are considered a cold IP. At this point, they need to acquire a good reputation with ISPs (internet service

© Optimizely 2022

providers).

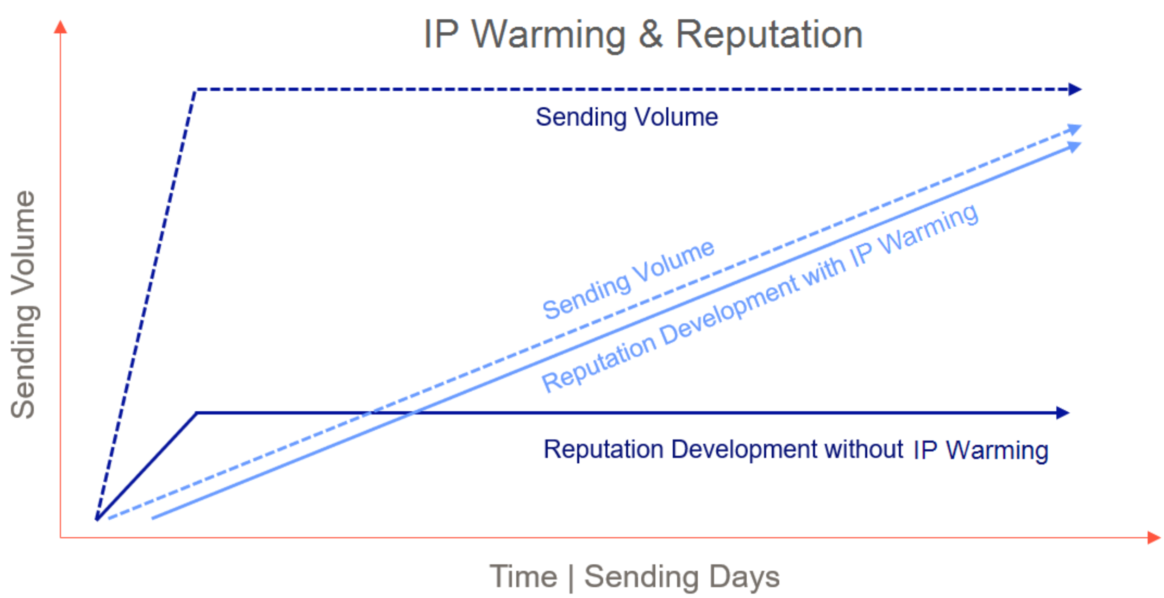
Hotmail, Yahoo!, AOL, Gmail need to see that you are sending important, consent-based messages to permit your mailings into your recipient's inbox.

IP warming is the process used to build a good reputation with ISPs. ISPs monitor your IP to track your sending behavior and are likely to accept your messages based on a good sending reputation.

The IP warming process includes sending consistent, low volume email campaigns, gradually increasing this volume over time until you reach your full volume capacity. ISPs then gain confidence in you as a sender.

It can take 4-6 weeks to complete the IP warming phase. This depends on your volume amount and how well your recipients engage with your messaging.

During the warming process, ISPs set receiving limits on your IP until you meet their standards of good reputation.



Getting started with IP warming

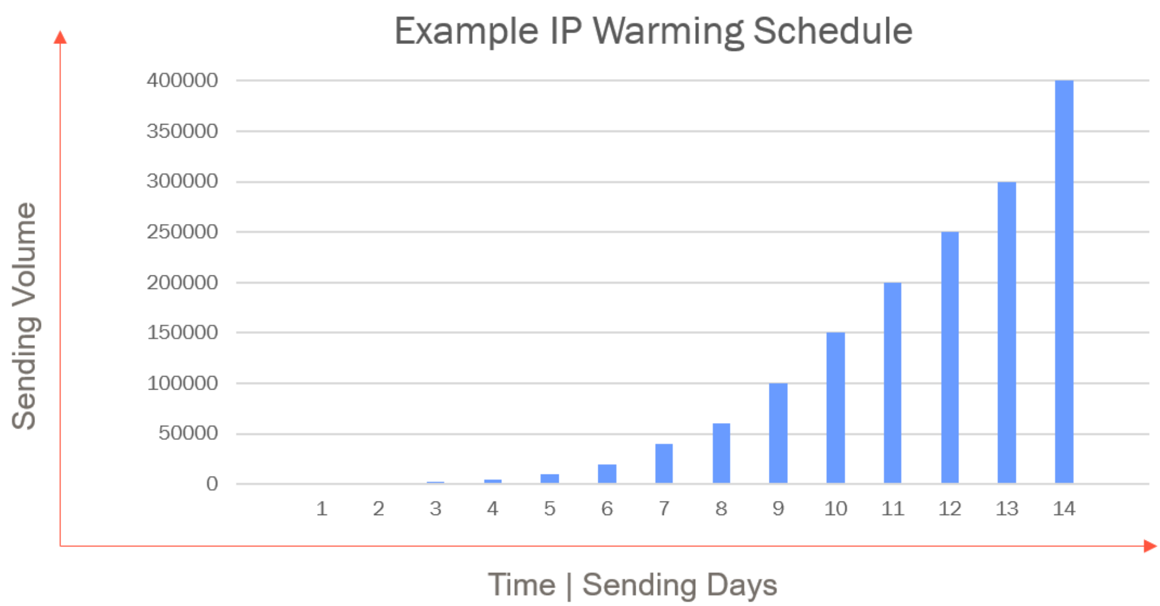
- Allowlist the Optimizely sending IP with your internal corporate network to ensure emails are not blocked by your internal spam filter.
- Ensure your IT team updates your DNS authentication records.
- Clean your data using segment and email validation tools. Warm your most active users only during IP warming phase. Active emails addresses consist of those who have recently opened, clicked an email in the last 9 months or opted-in to your mailings using a double opt-in database. Focus primarily on recipients who are less likely to report spam complaints. Never send to a bought or an old, unverified email list.
- If you don’t have engagement data to identify active email address, focus on recent signup data.
- Create email content that encourages recipient engagement and that is specific to the recipient's interests. See also: Email content best practices.
- Send a welcome email to your recipients. This reminds your recipients that they have opted-in and generates engagement for your first send out.
- As a new sender, it is normal to see some blocking and bulking in the first instance of sending. ISPs are trying to determine your legitimacy. As you continue to send to good, active email addresses and increase user engagement, bulking should end.
- Review your engagement data (opens, clicks). A decrease in engagement can lead to your messages being bulked by the ISP. Remove recipients from your marketing campaigns who are consistently not engaging.
- Frequency is important. ISPs like to see consistency in your sending and user engagement metrics.
- Reputation systems store reputation history for 30 days. Ensure that you do not go without 30 days of sending from an IP. Doing so may require restarting the warming process.

IP warming schedule

Following an IP warming schedule assists in gradually establishing a reputation with ISPs as a legitimate email sender. Start with small email volumes, and gradually increase volume each day according to the two-week set schedule. The following schedule suggests a maximum of 40 percent to 100 percentage increase in volume per day. This however greatly

© Optimizely 2022

depends on factors including list hygiene, how engaged your recipients are, and spam complaints among other things.



Day	Daily sending volume
1	500
2	1000
3	2500
4	5000
5	10000
6	20000
7	40000
8	60000

Day	Daily sending volume
9	100000
10	150000
11	200000
12	250000
13	300000
14	400000
	Continue to double your volume until you have reached your target daily volume.

Tips during the IP warming process

- Ensure that you are sending consistently and keep to that frequency.
- ISPs (internet service providers) like AOL want to see spam complaints less than 0.2%. Review email engagement on each send and remove recipients who are not opening.
- Once your IP (Internet Protocol address) exceeds the threshold set by the ISPs, the ISP may start to soft bounce the emails. If you experience a higher than normal soft bounce rate, stop sending and re-start the send later in the day.
- Start the day with recipients who are very likely to open your emails.

What can cause delivery issues during IP warming

- High spam complaints. This occurs when a recipient clicks "this is spam" button which is shown within the email client.
- Invalid email addresses (hard bounce).
- IP address and domain blocklistings on RBLs (public blocklists).
- Spam traps located within your data list.
- Unexpected volume increases.

What ISPs like to see

- Consistent opens and clicks
- Consistent email frequency
- Email best practices are in place, as detailed in Deliverability best practices.
- Emails are authenticated (SPF, DKIM, DMARC)

Warming a sending domain

A sending domain requires a good sending reputation for messages to enter your recipients' inboxes. Domain warming is similar to IP warming, as it represents mailing practices and volume. The same warming approach mentioned above can be applied to warming up sender domains. The difference however is that domain warming focuses on recipient engagement, which is the key factor to focus on.

Email authentication and encryption

Online abuse may occur in many ways, this includes spoofing of sender domains or email content and the sending of spam messages on behalf of someone else. To prevent this from happening, Optimizely applies a number of email authentication and encryption techniques.

Email authentication

A major aspect of the email delivery is the email authentication. ISPs (Internet Service Providers) and most email servers, in general, decide the credibility and authenticity of your email based on the email security policies that you have in place. Furthermore, email authentication is a technical method for identifying spam and verifying that an email is actually sent by the sender, which refers to technical standards. ISPs and organisations use these technical standards to block harmful emails such as phishing and spam.

IP-based authentication

Optimizely adheres to email technical standards to ensure we provide the utmost delivery of emails, this includes the authentication of our sending IP infrastructure. Our authentication standards are intended to improve security and trust when sending emails using the Simple Mail Transfer Protocol (SMTP).

Reverse DNS (rDNS or PTR)

The Reverse DNS record, also called PTR record, resolves an IP address to a host name. It adds tracing to the origin of an email and thus, credibility to an outbound email server. If the Reverse DNS lookup returns a ‘no domain associated’, the email will likely be filtered, bounced or deleted by the receiving ISP.

> **Tip:** Reverse DNS (PTR) records are set by default. No further action from your side is required.

Domain-based authentication

To help keep deliverability at its best, Optimizely requires that each sending domain is configured to enable Optimizely to send verified messages on behalf of your chosen domain. Records are added to your DNS managed by your IT administrator.

> **Tip:** For information on domain delegation and setting up sending domains, including the required DNS records, see Optimizely World.

Sender Policy Framework (SPF)

The SPF record prevents email spam by recognising email spoofing. The domain published in the “include” record contains all Optimizely sending IP ranges. Confirming the sender's IP addresses, SPF enables the domains administrators to determine which hosts are permitted to send emails on behalf of the given domain.

The SPF record is created as a TXT record on the technical return path domain like *t.example.com*.

Mandatory Optimizely SPF record

```
Type: TXT
Value: v=spf1 include:spf.srv2.de -all
```

© Optimizely 2022

DomainKeys Identified Mail (DKIM)

DKIM utilises the information published by the domain proprietor. The information permits the accepting server to check if the email message was sent by the proprietor of the domain. Using a digital signature, the receiver also verifies that the message was not changed during transmission.

For digitally signing a message, two keys are necessary. A private key that is stored in our infrastructure and signs outgoing messages, and a public key that is published in the DNS settings of a sender domain to be used. The domain of the Optimizely DKIM record contains this public key.

The DKIM record is set up as a CNAME record on both your technical return path like *t.example.com* and visible sender domain *example.com*.

Mandatory Optimizely DKIM record

```
Type: CNAME
Value: dkim.srv2.de
```

Domain-Based Message Authentication Reporting and Conformance (DMARC)

> **Tip:** For more information about the DMARC implementation, see **DMARC implementation**.

The DMARC record tells the receiving server which email authentication methods were used by the sender, and what an ISP should do with a message if it fails those authentication methods.

Possible DMARC policies:

- **p=reject** tells the receiver to reject an email that cannot authenticate with SPF and DKIM (Recommended)
- **p=quarantine** tells the receiver to quarantine an email that cannot authenticate with SPF and DKIM
- **p=none** tells the receiver to apply no special policy to an email that cannot authenticate with SPF and DKIM

© Optimizely 2022

Using the reject policy, emails that an unauthorized third party tries to send on your behalf as part of a spam attack would simply be blocked by the ISP. Furthermore, DMARC allows a sender to set up a reporting mechanism. Like that you will be notified each time an authentication failure and potential abuse of your domain is taking place.

The DMARC record is stored as TXT record with the prefix **_dmarc** in the DNS settings of your sender or organizational domain.

Mandatory Optimizely DMARC record

```
Domain: _dmarc.example.com
Type: TXT
Value: v=DMARC1; p=reject; rua=mailto:dmarc@example.com;
```

Brand Indicators for Message Identification (BIMI)

> **Note:** To use BIMI, contact customer support.

BIMI uses a text record which is stored on your DNS server and works together with DMARC to indicate to participating email clients that you are the true sender. The difference between BIMI and other authentication methods is that it uses front end visualisation by having the email provider show your branded logo within the users inbox. When a message is sent, the recipients ISP will look for the BIMI text file. When the ISP has successfully located the file for verification, your company's logo is shown in the recipient's inbox. Currently participating mailbox providers include Gmail, Comcast, and Verizon (Yahoo, AOL, and so on).

A BIMI setup currently has the following requirements:

- DMARC record with either reject or quarantine policy
- Logo to be displayed as .svg file (Scalable Vector Graphic)

The BIMI record is stored as TXT record with the prefix **_bimi** in the DNS settings of your sender or organizational domain. Furthermore, the domain starts with the BIMI selector, for now this is limited to the value **default**.

Example domain: *default._bimi.example.com*

Example BIMI record: `v=BIMI1; l=https//www.example.com/logo.svg; a=;`

© Optimizely 2022

Email encryption

Encryption is a security mechanism for converting information into code in order to prevent access to this information through unauthorized third parties. It is also used to protect data in transit. To protect it, the information itself and/or the transport of it are converted into a ciphertext and only authorized parties will be able to translate it back into plain, readable information. This is also how email encryption works.

Transport Layer Security (TLS)

Transport Layer Security (TLS) is the upgrade of Secure Sockets Layer (SSL), a protocol that used to communicate securely over computer networks. TLS Protocol secures a connection security, then using TLS Handshake, the protocol authenticates both sending and receiving servers. This prevents snooping during message transmission, protecting the content from being read by unauthorized third parties.

Based on the TLS protocol, there is the STARTTLS email protocol command, that tells the receiving server that for the transmission of the email an existing insecure connection shall be turned into a secure one.

With the opportunistic TLS mechanism that Optimizely is using, the recipient server is asked during transmission if it is able to process TLS encrypted messages and if the answer is yes, then the email gets sent using TLS encryption. If it's not possible, the email is sent without encryption. Optimizely uses TLS version 1.2 by default as it offers the strongest encryption, unless it is necessary to use a lower version in specific cases.

> **Tip:** TLS encryption is enabled by default. No further action from your side is required.

Digital signature

Using DKIM, you already have one digital signature mechanism in place. DKIM signatures are applied by Optimizely's sending server and verified by the receiving server of the ISPs. They guarantee the authenticity of your sending domain.

Additionally, it is possible to also sign emails in order to verify the actual sender and not only the domain. To do this, you can set up an S/MIME certificate that will then be visible to and verified by your recipients.

Secure/Multipurpose Internet Mail Extensions (S/MIME)

Secure multipurpose internet mail extension is an email signing protocol used to improve email signing, by enabling you to prove the actual sender of an email through a timestamped digital signature and to encrypt and decrypt the content of their emails. S/MIME helps ensure that files stay authentic and protected when sending between networks.

Remark: Digital signatures only ensure data integrity and do not apply to confidentiality. Emails protected with a digital signature are still sent as plain text. Message encryption of the S/MIME standard is not supported.

See **Sending S/MIME-signed emails**.

> **Note:** S/MIME encryption is an optional feature. To use S/MIME, contact customer support.

Blocklists and blocklisting

What is a blocklist?

An email blocklist is a real-time database, usually of an organization of the anti-spam community, that uses criteria to determine if an IP address or a domain is sending email that is considered to be spam and must therefore be prevented from further malicious activities. It helps the business using it to decide if emails received should be delivered to the final recipient or if they should rather be blocked because the sender is not trustworthy.

Public blocklists

When speaking of blocklists, a blocklist mostly refers to public blocklists that any business can include into their set of anti-spam measures. In this context, these are often called

Domain Name System-based Blackhole Lists (DNSBL) or Real-time Blackhole Lists (RBL), simply because they are operated and updated in real-time.

Blocklists are used by organizations like Internet Service Providers (ISPs), Free Mailbox Providers (MBPs) and anti-spam vendors but also private businesses as well as institutions of the public or educational sector to keep spam away from their infrastructure and their user's mailboxes.

ISP-internal blocklists

Since often heavily targeted by spammers, Internet Service Providers also have their own internal blocklists that a sender can get listed on when spammy behaviour is noticed. Any potential blocklisting in this regard only impacts sending to the corresponding ISP however.

Optimizely Campaign blocklist

Not a blocklist in that sense is the internal Optimizely Campaign blocklist. This is a so-called suppression list where you can manage recipients who no longer want to receive messages from you.

Types of blocklistings

Blocklistings are generally applied to the sending IP or the sender domain of a potentially untrustworthy sender.

IP-based blocklisting

An IP blocklisting applies to the IP address used for sending - the unique number given to every computer, server or other device when connecting to a network. If potential spam emails keep coming from the same IP address, it will then be added to a blocklist as an indication of junk. In most cases this means that further emails from the same IP address will also be blocked. Sometimes a spam issue can be so severe that an entire IP range is blocklisted.

Domain-based blocklisting

A domain blocklisting applies to the sender domain, no matter which IP addresses the potential spam emails are sent from. If a lot of spam originating from a certain domain is detected, this domain will be blocked. Even if you switch to a different IP, if the domain is still blocked, your emails will not be delivered.

How do I get blocked?

Blocklists are kept up to date usually in real-time with data provided by ISPs. An IP or a domain is quickly blocked if repeated signs of spamming behavior are noticed. However, even reputable senders can also be blocked, if one or more of the following problems have occurred:

- **Sending to spam traps**. Spam trap email addresses do not belong to any real person, they are honey pots set up by the Internet Service Providers or blocklist operators to identify senders that do not respect opt-in or do not practice list hygiene. These could have been harvested from websites or alternatively, these might have been old, inactive email accounts that were converted into spam traps after a too long time of inactivity.
- **High user complaints**. Spam complaints are reports ISPs receive when your recipients click the spam button in your emails. These make ISPs assume that the emails you send are unwanted, be it due to a lack of opt-in, too high email frequency, insufficient relevance of the email content or a lack of list hygiene. The more complaints, the more likely the responsible sending domain or IP address will be blocked.
- **Sending to a high number of inactive email accounts**. Sending to inactive email addresses often leads to high hard bounce rates. This is an indicator for an ISP that a big part of your recipient list is either very old or has not been acquired using double opt-in.
- **Big surge in recipient list size**. A good email marketing list will grow sustainably over time as new customers or leads sign up to receive your emails. When a list grows disproportionately in a short period of time, ISPs might suspect that it has been purchased or crawled. Furthermore, big spikes in sending volume are a typical sign of spammers and are therefore often distrusted.

If your sending activities are in line with the Optimizely Campaign **Deliverability best practices**, no blocklistings are expected.

Important blocklists

Nowadays, there are countless blocklists which are used by the anti-spam industry, Internet Service Providers, and major businesses around the world. However, some of them have a much greater impact on deliverability than others. Optimizely and Optimizely's customers must ensure collaboratively that the sending IPs and domains are not listed, otherwise this can have a very negative impact on your deliverability. The most important blocklists are listed in the table below.

Blocklist	Description	Impact on deliverability
Spamhaus	Spamhaus runs numerous lists that are used by companies and ISPs around the world – such as Spamhaus Block List (SBL), Domain Block List (DBL), and Policy Block List (PBL). SBL is the one that most senders are likely to run into through the sending of marketing emails to ISPs. Spamhaus includes sending domains and IPs of known spam sources as well as spam trap addresses commonly found in purchased lists into their detection mechanisms.	**High** Affects delivery to ISPs, anti-spam appliances and B2B addresses
Invaluement	The Invaluement blocklist consists of the ivmURI list which lists URLs that have been identified as malicious, the ivmSIP list that is based on IP addresses from known botnets and snowshoe spammers as well as the ivmSIP/24 list that lists entire IP ranges or sub-nets where spamming activities have been detected. Invaluement mostly relies on spam complaint data provided by web hosts and mailbox providers to generate blocklistings which are used by a variety of reputation systems and anti-spam appliances.	**High** Affects delivery to ISPs, anti-spam appliances and B2B addresses mostly in the UK, US, and Nordic countries
SpamCop	The SpamCop Blocking List (SCBL) lists IP addresses that have transmitted reported spam to SpamCop users. With the SpamCop Domain Blocking List (SCdBL) SpamCop have also started to offer domain-based blocklisting, which occurs based on the sender domain and signature used. SpamCop is mostly known as an anti-	**Medium** Affects delivery to B2B addresses

Blocklist	Description	Impact on deliv-erability
	spam service one can report spam to, but they also analyse email sent to spam traps. Furthermore, SpamCop applies a scoring system to weigh reported email before an IP or domain is listed.	
SORBS	Spam and Open Relay Blocking System (SORBS) is a blocklist that mainly works with spam traps and a hit of one of their traps leads to the blocking of single IP addresses or entire IP ranges.	**Low** Affects delivery to B2B addresses
Barracuda	The Barracuda Reputation Block List (BRBL) is a service operated by the security and anti-spam vendor Barracuda Networks. It mainly lists IP addresses that have transmitted email to spam traps. If an IP address passes some basic tests, such as for proper server configuration, the email is then scored against the Barracuda Reputation System which takes into account any potential threats detected by the Barracudas anti-spam appliances and if considered spam, immediately added to the BRBL.	**Low** Affects delivery to B2B addresses
NiX Spam	NiX Spam is a German blocklist that also works with spam traps and blocks the IP address used for sending the email that hit their traps.	**Low** Affects delivery to B2B addresses mostly in the DACH region
UCEPROTECT	UCEPROTECT is a spam protection database founded in Germany which is mostly used by their members in Germany, Austria and Switzerland. It mostly affects domains of public bodies and private businesses and is based on spam trap hits and spam complaints. Listings may occur to single IP addresses (level 1), multiple IP addresses (level 2) and finally all IPs of entire IP networks (level 3).	**Low** Affects delivery to public bodies and B2B addresses mostly in the DACH region

© Optimizely 2022

Optimizely proactively monitors hundreds of known blocklists, keeps you updated on blocklistings that could potentially impact your sending and provide strategy consulting on how to avoid them.

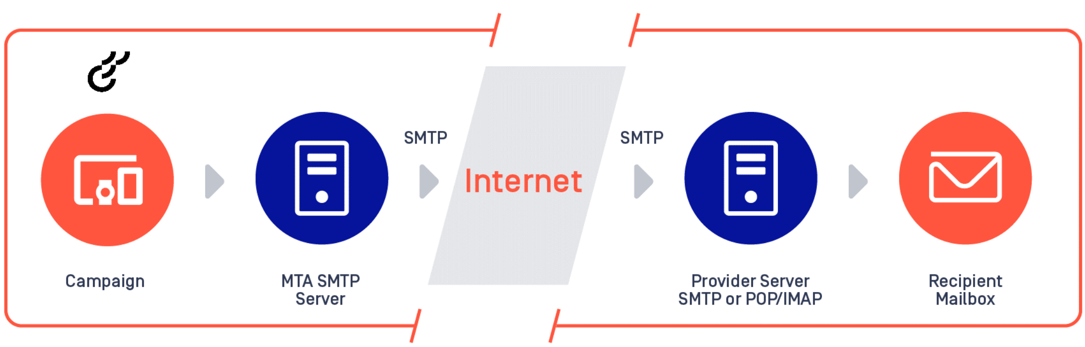
SMTP codes and error messages

This topic gives an introduction to the SMTP protocol and describes status codes and possible reasons for SMTP errors.

SMTP protocol

SMTP stands for Simple Mail Transfer Protocol, which provides mechanisms for the transmission of emails and is the technical standard behind the sending, relaying and receiving of these.

When you start a mailing in Optimizely Campaign, it is transferred to the Optimizely Campaign sending SMTP server, a so-called Mail Transfer Agent (MTA). The MTA relays your e-mails to the receiving server of the target ISP or domain owner via the SMTP protocol, which ultimately delivers the individual e-mails to the corresponding mailboxes.



In an ideal world, your email gets accepted by the ISP and delivered to the intended recipient's inbox. Having some experience with email marketing, you already know that this is not always what happens. Your emails may get delayed, land in the spam folder, or may be dropped or returned to you as a bounce.

SMTP status codes

Since there are many potential outcomes of a sending attempt, standard mechanisms for the reporting of mail system errors were developed to make processing and analysis of these easier and more transparent. The result of this is a list of possible SMTP status codes that you will often see included in bounce messages when analyzing your returns.

In most cases, the mailbox providers return two pieces of information in the event of a bounce, a traditional SMTP response status code and an enhanced mail system status code. Both provide information about the reason for the rejection and help in finding a solution.

Traditional SMTP respone status codes

According to the first scheme developed, the traditional SMTP response status codes defined in RFC 5321, the receiving SMTP server of an ISP or domain owner responds to the sender using a three-digit code. All SMTP response status codes are separated into five classes and the first digit of the status code defines the class of response:

- **1xx (Informational)**. The request was received, continuing process.
- **2xx (Success)**. The request was successfully received, understood, and accepted.
- **3xx (Redirection)**. Further action needs to be taken, in order to complete the request.
- **4xx (Persistent transient failure)**. The request contains bad syntax or cannot be fulfilled.
- **5xx (Permanent errors)**. The server failed to fulfill an apparently valid request.

A successfully delivered e-mail has the status code *250 Requested mail action okay completed.*

The SMTP response status codes to be applied are defined by the host of a server. Different ISPs, mailbox providers or domain owners may define them differently. Therefore, there is no unique presentation.

SMTP status code	Error message
420	Timeout
421	<domain> Service not available

SMTP status code	Error message
422	Unprocessable Entity
431	Not enough space on the disk
432	Recipient's incoming mail queue has been stopped
441	Account is over data quota
442	Connection Refused
446	The maximum hop count was exceeded for the message
447	Timeout
449	Routing error
450	Requested mail action not taken: mailbox unavailable
451	Requested action aborted: local error in processing
452	Requested action not taken: insufficient system storage
471	An error of your mail server
500	Syntax error, command unrecognised
501	Syntax error in parameters or arguments
502	Command not implemented
503	Bad sequence of commands
504	Command parameter not implemented
510	Bad email address

SMTP status code	Error message
511	Bad email address
512	Host server for the recipient's domain name cannot be found in DNS
513	Address type is incorrect
521	<domain> does not accept mail
523	Size of your mail exceeds the server limits
530	Access denied
541	The recipient address rejected your message
550	Requested action not taken: mailbox unavailable
551	User not local
552	Requested mail action aborted: exceeded storage allocation
553	Requested action not taken: mailbox name not allowed
554	Transaction failed

Enhanced mail system status codes

Since the information provided in the traditional codes is limited and there was a need for reporting mechanisms richer than these, a new set of enhanced mail system status codes was proposed in RFC 3463. The enhanced mail system status codes are based on the SMTP theory of reply codes and adopt the success, permanent error, and transient error semantics of the first value, with a further description and classification in the second:

- **2.XXX.XXX (Success)**. Success specifies that the DSN is reporting a positive delivery action. Detail sub-codes may provide notification of transformations required for delivery.

- **4.XXX.XXX (Persistent Transient Failure)**. A persistent transient failure is one in which the message as sent is valid, but persistence of some temporary condition has caused abandonment or delay of attempts to send the message. If this code accompanies a delivery failure report, sending in the future may be successful.
- **5.XXX.XXX (Permanent Failure)**. A permanent failure is one which is not likely to be resolved by resending the message in the current form. Some change to the message or the destination must be made for successful delivery.

A successfully delivered e-mail has the status code *2.0.0 (success)*.

Just like the traditional SMTP response status codes, the application of these varies from mailbox provider to mailbox provider. For undelivered emails, are may transmitted bounce codes as below. These can appear as a persistent transient failure starting with a 4, or as a permanent failure starting with a 5.

SMTP status code	Error message
X.0.0	Other undefined status
X.1.0	Other address status
X.1.1	Bad destination mailbox address
X.1.2	Bad destination system address
X.1.3	Bad destination mailbox address syntax
X.1.4	Destination mailbox address ambiguous
X.1.5	Destination address valid
X.1.6	Destination mailbox has moved, No forwarding address
X.1.7	Bad sender's mailbox address syntax
X.1.8	Bad sender's system address
X.2.0	Other or undefined mailbox status

SMTP status code	Error message
X.2.1	Mailbox disabled, not accepting messages
X.2.2	Mailbox full
X.2.3	Message length exceeds administrative limit
X.2.4	Mailing list expansion problem
X.3.0	Other or undefined mail system status
X.3.1	Mail system full
X.3.2	System not accepting network messages
X.3.3	System not capable of selected features
X.3.4	Message too big for system
X.3.5	System incorrectly configured
X.4.0	Other or undefined network or routing status
X.4.1	No answer from host
X.4.2	Bad connection
X.4.3	Directory server failure
X.4.4	Unable to route
X.4.5	Mail system congestion
X.4.6	Routing loop detected
X.4.7	Delivery time expired

© Optimizely 2022

SMTP status code	Error message
X.5.0	Other or undefined protocol status
X.5.1	Invalid command
X.5.2	Syntax error
X.5.3	Too many recipients
X.5.4	Invalid command arguments
X.5.5	Wrong protocol version
X.6.0	Other or undefined media error
X.6.1	Media not supported
X.6.2	Conversion required and prohibited
X.6.3	Conversion required but not supported
X.6.4	Conversion with loss performed
X.6.5	Conversion Failed
X.7.0	Other or undefined security status
X.7.1	Delivery not authorized, message refused
X.7.2	Mailing list expansion prohibited
X.7.3	Security conversion required but not possible
X.7.4	Security features not supported
X.7.5	Cryptographic failure

SMTP status code	Error message
X.7.6	Cryptographic algorithm not supported
X.7.7	Message integrity failure

Reasons for SMTP errors

Just as there are a multitude of SMTP codes, they also come from a multitude of possible causes. These are the most commonly observed:

- **Unknown users**. Sending to inactive email accounts leads to permanent SMTP errors that are handled as hard bounces.
- **Suspected sending of spam**. The spam filter and/or reputation metrics of an ISP or mailbox provider have detected bad sender reputation or spammy sending patterns with regard to email content and/or user feedback and rejects your emails with SMTP errors categorized as soft bounces.
- **Incorrect DNS setup**. Sending with unauthenticated sender domains may result in SMTP errors classified as soft bounces. See **Email authentication and encryption**.
- **Full mailboxes**. Overflowing recipient mailboxes lead to SMTP errors handled as soft bounces.
- **Technical failures**. Connection or performance issues on the recipient's side are generally treated as transient errors and do not immediately bounce. Optimizely undertakes various delivery attempts and only if these are not successful within several days, they lead to soft bounces.

SMTP errors and bounce issues can be greatly reduced by following the **Deliverability best practices**.

Optimizely's bounce management recognizes all common SMTP error codes and messages received by the ISPs or mailbox providers and classifies them in the appropriate bounce category. They are regularly reviewed and updated to provide you bounce processing according to the latest industry standards.

© Optimizely 2022

DMARC implementation

DMARC stands for Domain-Based Message Authentication Reporting and Conformance (DMARC) and is a mechanism that is intended to counteract so-called email spoofing. Email spoofing is the sending of spam emails with fake sender domains, mostly on behalf of well-known companies and brands that are not even aware of this abuse. These often lead to high bounce rates, spam trap hits and spam complaints, which are technically attached to the real domain owner and have a negative effect on the reputation of his domain and thus on the mailings sent from it.

DMARC therefore makes a major contribution to protecting the online reputation of your domains and your brand by preventing or at least reducing domain abuse. Participating Internet Service Providers also attribute senders using DMARC a better reputation and thus enable better delivery results. In addition, DMARC is a basic criterion for setting up BIMI (Brand Indicators for Message Identification).

DMARC is supported by the following ISPs (extract): Gmail, Yahoo, AOL, Microsoft, Netease (126.com, 163.com), Tencent (qq.com), Mail.ru, Comcast, AT&T, British Telecom, Virgin Media, Italia Online. 1&1 (GMX, Web.de) is currently implementing DMARC.

Functionality and requirements

The handling of potential spam emails is generally the responsibility of the receiving ISP that works with a variety of security metrics, including Sender Policy Framework (SPF) and DomainKeys Identified Mail (DKIM), to protect its recipient's mailboxes from spam, scam or phishing emails.

Using DMARC, you as the sender can now independently tell the receiving mailbox provider how they should proceed with emails if they cannot authenticate themselves via SPF and DKIM. DMARC is considered a third layer of protection, which is based on the existing authentication mechanisms SPF and DKIM and supplements them. The implementation of these two authentication standards is required at Optimizely during onboarding or when setting up additional sending domains.

In addition, the DMARC reporting functionality makes cases of domain abuse visible for the first time. This helps you to understand current delivery trends of your emails and to monitor your reputation.

© Optimizely 2022

DMARC record

DMARC can generally be set up for the entire organizational domain or specifically for a subdomain used for email sending. Ideally, DMARC is set for the organizational domain to protect the entire domain, all associated subdomains and thus the brand as a whole. The important part for the delivery of your emails is the application of DMARC on the sender domain.

The DMARC record is inherited by the subdomains belonging to the DMARC domain. If it is set on the organizational domain, it is automatically applied to all associated subdomains of this domain.

To set DMARC, a subdomain with the name *_dmarc* must be created for the domain for which DMARC should ultimately be used. The Optimizely recommended entry is as follows:

- **Example domain**. example.com
- **DMARC domain**. _dmarc.example.com
- **Record type**. TXT
- **DMARC record**. v=DMARC1; p=reject; rua=mailto:dmarc@example.com;

DMARC policies

One of the most important parts of the DMARC is the policy tag. With this, the domain owner specifies how a DMARC-supporting mailbox provider should handle emails that cannot authenticate correctly with SPF and DKIM. The following three policies can be set. Optimizely recommends setting the reject policy.

- **p=reject**. Instructs the receiver to reject an email that cannot authenticate with SPF and DKIM.
- **p=quarantine**. Instructs the receiver to deliver an email to the spam folder that cannot authenticate with SPF and DKIM.
- **p=none**. Instructs the receiver not to apply any special policy to an email that cannot authenticate with SPF and DKIM.

Using the reject policy, emails that an unauthorized third party tries to send on your behalf as part of a spam attack, would simply be blocked by the ISP.

© Optimizely 2022

DMARC tags

The following table provides an overview of the possible DMARC tags. The Optimizely DMARC record only contains three of them.

Tag	Definition	Recommendation
v	Version	The version must be set with *v=DMARC1*.
p	Policy	The DMARC policy must also be set. Optimizely recommends setting the strongest policy *p=reject* to reject spam emails from your domain.
sp	Subdomain Policy	If another DMARC policy is to apply to your subdomains, this can be specified with the sp tag, such as *sp=quarantine*. This setting is optional.
rua	Aggregate Report	Optimizely recommends specifying a reporting address for receiving aggregated DMARC reports, such as *rua=mailto:dmarc@example.com*.
ruf	(Forensic) Failure Report	Optimizely recommends not using forensic reports. They contain email addresses of spam recipients and are therefore possibly not GDPR-compliant.
adkim	DKIM Alignment	No separate tag is necessary, so the default setting applies: *adkim=r* (Relaxed).
aspf	SPF Alignment	No separate tag is necessary, so the default setting applies: *aspf=r* (Relaxed).
rf	Reporting Format	No separate tag is necessary, so the default setting applies: *rf==afrf*.
ri	Report Interval	No separate tag is necessary, so the default setting applies: *ri=86400* (1 Tag).
pct	Percentage	No separate tag is necessary, so the default setting applies: *pct-*

Tag	Definition	Recommendation
		=100.
fo	Failure Reporting Options	No separate tag is necessary, so the default setting applies: *fo=0*. The following options generally exist: • **fo=0**. A report should be sent if the SPF and DKIM check fail at the same time. • **fo=1**. A report should be sent if either the SPF or the DKIM check fails. • **fo=d**. A report should be sent if only the DKIM check fails. • **fo=s**. A report should be sent if only the SPF check fails.

DMARC Identifier Alignment

The DMARC check itself is based on the DMARC Identifier Alignment. This requires that at least one of the domains that are authenticated via SPF and DKIM matches the visible sender domain.

In case of the SPF alignment, the technical domain (RFC5321), also called return path or envelope-from, must correspond to the visible sender domain (RFC5322), also called from-domain or header-from, and meet one of the two variants:

- **Relaxed SPF Alignment**. The technical and the visible domain have the same organizational domain.
- **Strict SPF Alignment**. The technical and the visible domain have the same subdomain.

In case of the DKIM alignment, the domain that is signed with DKIM and can therefore be found in the d= parameter in the email header must correspond to the visible sender domain and meet one of the two variants:

- **Relaxed DKIM Alignment**. The DKIM domain and the visible domain have the same organizational domain.
- **Strict DKIM Alignment**. The DKIM domain and the visible domain have the same subdomain.

© Optimizely 2022

> **Tip:** DMARC Identifier Alignment is set up by default with Optimizely Campaign.

DMARC reporting

An additional feature that SPF and DKIM do not offer is the creation of DMARC reports. DMARC reporting notifies you if authentication errors of the SPF and DKIM are detected in emails sent with your domain, which means that your domain is potentially abused.

DMARC reports can help you to understand whether and to what extent domain abuse is taking place. Spam emails that are sent in your name and with your domain ultimately also have a negative effect on your sender reputation and delivery performance. In addition, DMARC reports can provide you with information about the origin of spam attacks and help you to fight them.

Optimizely recommends setting up so-called aggregated reports.

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<feedback>
  <report_metadata>
    <org_name>acme.com</org_name>
    <email>noreply-dmarc-support@acme.com</email>
    <extra_contact_info>http://acme.com/dmarc/support</extra_contact_info>
    <report_id>9391651994964116463</report_id>
    <date_range>
      <begin>1335571200</begin>
      <end>1335657599</end>
    </date_range>
  </report_metadata>
  <policy_published>
    <domain>example.com</domain>
    <adkim>r</adkim>
    <aspf>r</aspf>
    <p>none</p>
    <sp>none</sp>
    <pct>100</pct>
  </policy_published>
  <record>
    <row>
      <source_ip>72.150.241.94</source_ip>
      <count>2</count>
      <policy_evaluated>
        <disposition>none</disposition>
        <dkim>fail</dkim>
        <spf>pass</spf>
      </policy_evaluated>
    </row>
    <identifiers>
      <header_from>example.com</header_from>
    </identifiers>
    <auth_results>
      <dkim>
        <domain>example.com</domain>
        <result>fail</result>
        <human_result></human_result>
      </dkim>
      <spf>
        <domain>example.com</domain>
        <result>pass</result>
      </spf>
    </auth_results>
  </record>
</feedback>
```


© Optimizely 2022

Source: DMARC.org

The report contains general information about the sender and the period under review in the *<report_metadata>* area. Furthermore, in the *<policy_published>* area, you will see the DMARC policy applied and other tags used such as domain alignment or DMARC percentage. The last and most important section *<record>* contains the sending IP and domain, which caused an SPF and/or DKIM error. *<dkim>fail</dkim>* indicates that the domain signature could not be verified, and on the other hand, *<spf>fail</spf>* indicates that the sending IP was not contained in the SPF record of the sending domain.

In addition to the aggregated report, there is also a second reporting format, the forensic failure report. However, this report contains personal data such as the email addresses of unrelated recipients and is therefore classified as not GDPR-compliant and not recommended to be used.

Implementing DMARC

To implement DMARC, perform the following steps:

1. **Selecting the domain**
2. **Checking the domain**
3. **Selecting an email address**
4. **Setting up the DMARC record**
5. **Analyzing the results**

Selecting the domain

Select the domain on which you want to set DMARC. You can

- set DMARC on a domain that is solely used for sending with Optimizely. This is usually a subdomain.
- set DMARC on your organizational domain. This may or may not be the sending domain set up at Optimizely.

In order for DMARC to have an impact on your deliverability, it must at least be set for the sending domain used with Optimizely. However, it is recommended to set up DMARC on your organizational domain to protect the entire domain and brand.

> **Tip:** DMARC is inherited on all subdomains of the DMARC domain.

Checking the domain

When using a domain that is used for sending with Optimizely, domain alignment and both authentication mechanisms SPF and DKIM are set by default. If you are unsure:

- Send test emails and check in the email header whether your sending domain corresponds to the returnpath domain or the DKIM domain, listed under the d= header, at least at the level of the organizational domain.
- Check in the email header whether your email authenticates with SPF and DKIM. If you cannot find a warning about an incorrect DNS setup in your Campaign account, the emails are most likely correctly authenticated.

> **Note:** For the implementation of DMARC on the organizational domain, other mail streams such as emails via your own infrastructure or other email service providers must be taken into account and domain alignment, SPF and DKIM must be implemented correctly for all of them. Otherwise DMARC can lead to unwanted blocking of these emails.

Selecting an email address

To receive DMARC reports, you need to set an email address. The reporting address should be based on the same organizational domain like your DMARC domain. Since you will possibly receive a lot of reports, it makes sense to create a separate mailbox for them.

If you want to use an official tool for DMARC analysis, you will likely be provided with a reporting email address.

Setting up the DMARC record

A TXT record with the prefix **_dmarc** must be created for the domain for which DMARC is ultimately to be used. The Optimizely recommended entry is as follows:

© Optimizely 2022

- **Example domain**. example.com
- **DMARC domain**. _dmarc.example.com
- **Record type**. TXT
- **DMARC record**. v=DMARC1; p=reject; rua=mailto:dmarc@example.com;

Send a test email and check the email header to see if it authenticates using SPF, DKIM and DMARC. This is particularly easy to see in a Gmail header.

Analyzing the results

If your domain is abused to send spam emails, you will receive DMARC reports to your specified reporting email address. Ideally, this will allow you to draw conclusions about your current deliverability situation. At the same time, you learn how many potential spam emails were blocked and never reached any recipient.

The following tools can be used for analysis and visualization:

- Dmarcian
- DMARC Analyzer
- Valimail DMARC Monitor
- Postmark DMARC Monitor

The use of these tools may cause costs. The application of DMARC itself is free of charge.

Options for gradual implementation

Optimizely recommends targeting the full application of the reject policy.

If you are unsure whether all your mail streams from your DMARC domain are already authenticated with SPF and DKIM, or whether you are sending further legitimate emails without authentication, you can work with a test phase and evaluate your reports first. If a phased introduction is planned, this can be implemented as follows:

- **Policy level**. Start with a none policy so DMARC will not affect sending. Once you have verified that the functionality works as intended, change the policy tag to *quarantine* and finally to *reject*.
- **Percentage level**. Implement the reject policy but apply DMARC to a limited percentage of the sending volume, such as 10%. The percentage can be slowly increased over time.

You can find more information on DMARC.org.

List bombing

Your subscription process is the beginning of your relationship with your recipients. However, subscription forms can be misused by malicious parties to send spam, with a method called list bombing.

List bombing as a form of cybercrime

List bombing refers to a practice of abusing and attacking email list subscription pages by bombarding them with a large number of new email addresses at the same time. For you, it looks like a spike in subscriptions. In reality, it is a cyberattack.

Bots are being used to register innocent email addresses through open or poorly secured web subscription forms in high volumes. These subscriptions are made possible by the fact that the web forms use no measures and accept all email addresses entered without any verification. These may be either generated or collected by bots to flood your business' lists. In this case even using double opt-in (DOI) does not help much, because the volume of confirmation emails alone is enough to cause a substantial problem.

The first list bombing was detected in August 2016 by Spamhaus, a prominent anti-spam organization. According to Spamhaus, 22,000 subscriptions took place at a single ESP, targeting 3,000 different domains, resulting in a volume of sometimes over 100 messages a minute to some addresses. One company saw nine specific addresses registered over 9,000 times over the course of two weeks, creating 81,000 confirmation emails. Spamhaus then listed tens of networks, including ESPs, on the Spamhaus Block List (SBL).

Optimizely continuously monitors its sending infrastructure to detect and advise you about list bombing incidents before they have an impact on your deliverability.

Am I being list bombed?

There are several signs that will help you identify if your subscription forms are being used for list bombing.

© Optimizely 2022

Unexpected increase in subscribers

Sudden increase in subscribers, especially if these cannot be traced back to a marketing campaign, are a sign of subscription form abuse. Have a look at your data and try to identify email addresses that repeatedly registered in a short period to one or more of your lists.

Subscriptions from the same IP address

If you see multiple tens or hundreds of subscriptions from a single IP address, it is safe to say that an attack is taking place. It is best to directly block that IP address and to delete the newly registered email addresses via that IP address from your database.

High bounce rate of opt-in emails

Opt-in emails such as DOI mailings can bounce every now and then, as recipients sometimes register with an incorrect email address. If these bounce rates are also regularly at a high level, one can assume that the subscription form is being abused.

Subscriptions from unexpected regions

Based on the geographical region your business operates in, you usually send more emails to some ISPs than others. High numbers of opt-in emails or even bounces of these at ISP domains that are less common in your region can indicate subscription form abuse.

Example: If you send mainly in the DACH region, a high volume of subscriptions and DOI emails to Russian or Chinese mailbox providers or even global ISPs like AOL or Yahoo is generally possible but unlikely and might indicate abuse.

Spam complaints about DOI emails

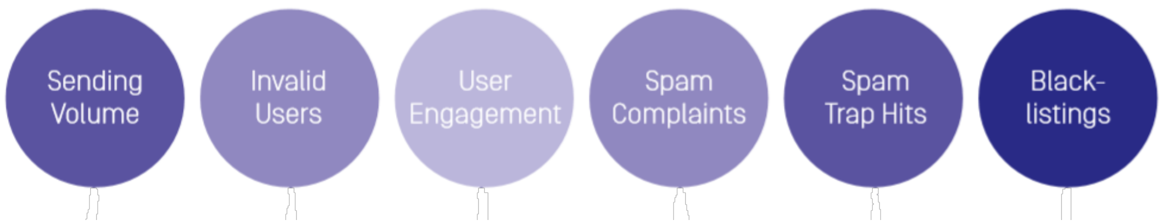
Should you receive spam complaints about your opt-in mailings, check your latest subscriptions as your forms may be under attack.

© Optimizely 2022

Danger of list bombing attacks

When someone list bombs your site, they corrupt your data. Not only invalid, but also valid email addresses are fraudulently added to your email lists, which can damage your sender reputation and deliverability performance.

As outlined in the **Sender reputation guide**, ISPs collect data about mailing practices to determine if a sender is a good or a bad sender and based on this data they decide how your emails should be handled. The key metrics analyzed include:



Subscription form abuse might produce unexpectedly high email volume. Sending to a high number of inactive users will lead to high hard bounces. If spam trap addresses are registered, sending to these might cause listings at public or ISP-internal blocklists and in the worst case a blocking of all your emails. Sending to existing email addresses that were signed up by a spammer will lead to annoyed recipients, low user engagement and potentially spam complaints.

All these factors have a negative impact on your sender reputation. Therefore, measures against list bombing attacks are essential for every subscription form.

Measures for protection

If you notice you have been list bombed, do not panic. There are several possible solutions. Identify the day/hour the attack started and remove all new users that were added to your list after that. If you already use DOI, simply remove new subscribers, who have not confirmed their opt-in yet.

To prevent throwing away entire days or weeks' worth of subscriptions to ensure you have truly gotten rid of all bad data from a list bombing attack, we recommend implementing at least one or more of the following measures to protect your subscription forms.

© Optimizely 2022

- **Implement a CAPTCHA**. CAPTCHAs can distinguish user subscriptions from automated subscriptions through bots. There is a variety of CAPTCHA providers on the market offering solutions based on different mechanisms and compliance levels, e.g., with GDPR.
- **Integrate a honeypot field**. A honey pot in subscription forms is an additional content field invisible to human beings but indistinguishable for a bot. If you detect that the field has been filled, the subscription was not done by a human being and the process can be canceled immediately. See **Integrating honeypots**.
- **Change field names in HTML source**. Bots look for text fields in the source code of a website. Make it harder for them and change the field names to something other than standard, e.g., from *First name, Last name, Email* to *First_Banana, Last_Apple, Em_Orange*. That will prevent most bots from locating them.
- **Measure form submission times**. Measure the time needed for form submissions by integrating a field that looks at a time stamp or generated key for the page load. A human being may need several minutes to fill out a form, a bot only a second. If a particularly short time is detected, break the subscription process.
- **Add IP rate limits**. Work with rate limits in your subscription form, which prevent the same form from being submitted multiple times from the same IP address in a certain period of time.
- **Manage allowed form input**. Implement a lock for certain entries in your subscription form, such as special characters, URLs and HTML tags or regularly clean your list of new subscribers. Spammers may insert URLs leading to malicious or illegal websites that may be unintentionally included in your emails and then clicked by inattentive recipients.

Integrating honeypots

You can integrate honeypot fields in subscription forms as follows:

```
<input type="email" name="email-confirmation-field1" class="hidden" place-
holder="Your email address" required="required" autocomplete="off">
/* Email field visible to the recipient */
```

```
<input type="email" name="email-field1" class="required" placeholder="Your
email address" id="required" autocomplete="off">
/* Honeypot field */
```

```
<input type="text" name="birthday-field1" class="optional" auto-
complete="off">
/* Honeypot field */
```

```
<input type="text" name="name-field1" class="required" autocomplete="off">
/* Honeypot field */
```

© Optimizely 2022

```
<input type="text" name="city-field1" class="optional" autocomplete="off">
/* Honeypot field */
```

> **Note:**
> - **class="hidden"**. Adjust your CSS style sheet for the subscription page to make this class *visible*.
> - **autocomplete="off"**. Is intended to prevent form fields from being filled in automatically. However, this setting is not supported by all web browsers. Therefore, change the field names to something other than standard, for example, `birthday-field1`.
> - Adjust your CSS style sheet for the subscription page so that all other classes and IDs are *not visible*. For example, use the following commands:
>   - `visibilty:none;`
>   - `display:none;`
>   - `width:0px;`
>   - `height:0px;`

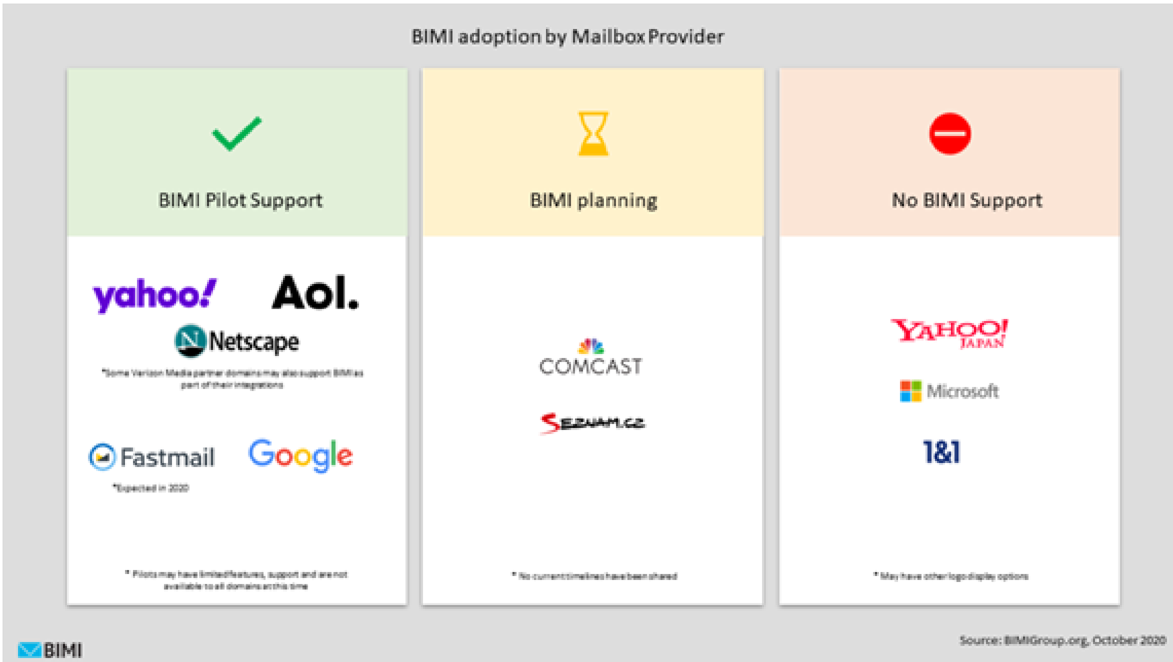
BIMI piloting

BIMI stands for Brand Indicators for Message Identification and is an email authentication standard that allows you to display a verified company logo in your recipients' inboxes when sending a properly authenticated email. They can immediately trust that it is an actual email from you and not a dangerous phishing attempt. BIMI does not guarantee 100% deliverability, but it can help you achieve more brand recognition and trust, a higher sender reputation and ultimately better email KPIs.

Current state of adoption

The BIMI standard is relatively new and still in the piloting phase at many Internet Service Providers (ISPs). The distribution and further development are being driven by the AuthIndicators Working Group, which offers further information on the current status at Bimigroup.org.

State of adoption as of October 2020:



A full implementation is already possible with the mobile and web clients from Yahoo and AOL as well as Google. To send authenticated emails with BIMI, see **Implementing BIMI**.

Functionality and requirements

To set up BIMI, the basic authentication standards must be in place, including Sender Policy Framework (SPF), DomainKeys Identified Mail (DKIM) and Domain-Based Message Authentication Reporting and Conformance (DMARC). See **Email authentication and encryption**.

The BIMI standard expects a DMARC setup on the organizational domain. Many ISPs who are implementing BIMI or who are considering BIMI support in the future recommend that senders start to prepare now and implement DMARC. See **DMARC implementation**.

The BIMI setup itself is done by creating a BIMI text record on the domain which is to be authenticated with the company logo in the future. The record will contain a reference to the company logo and possibly a so-called Verified Mark Certificate (VMC) that officially validates the logo. The logo itself must be delivered as a Scalable Vector Graphic (SVG Tiny 1.2 Portable/Secure) with further specific format requirements. VMCs are required to use BIMI with Google and can currently be purchased from Entrust or Digicert. At Yahoo and AOL they are not currently required.

When attempting to deliver an email, the participating ISPs will verify the DMARC setup on the one hand and the BIMI setup on the other. If both checks are successful, the ISPs will pull the logo from the URL in the BIMI record to display the BIMI image in the inbox next to your email. ISPs state that a good sender reputation is essential for this.

Technical specifications

BIMI record

To use BIMI, a BIMI record must be created for your sending domain which should benefit from the verified logo display in the end. This can be a subdomain or an organizational domain.

Example BIMI record:

- **Example domain**. example.com
- **BIMI domain**. default._bimi.example.com
- **Record type**. TXT
- **BIMI record**. v=BIMI1; l=https://www.example.com/logo.svg;

Available BIMI tags

The following table provides an overview of the possible BIMI tags and the implementation options.

Tag	Definition	Implementation
v	Version	The v tag is required and must be set with *v=BIMI1*.
l	Location	The l tag is required and indicates the location of the logo you want to display. It is specified as a URL with HTTPS. HTTP will not work.
a	Trust authorities	The a tag is required for the BIMI setup with Google and is used to validate domain ownership using a Verified Mark Certificate. The accep-

Tag	Definition	Implementation
		ted values are: • **self**. No validation option, similar to not having an a tag. • **cert**. Provides an HTTPS URL to a Verified Mark Certificate that can be used to validate the logo in the l tag. • **mva**. Specifies an HTTPS URL to an API endpoint that can be queried for validation.

Image requirements

The BIMI standard requires the creation of a logo in the image format SVG Tiny 1.2 Portable/Secure, in short SVG P/S.

The SVG P/S format is stricter than SVG Tiny 1.2 and requires the image to be a centered, square image of your official company logo without any additional text on a background of solid colour. Additionally, the image should be as small as possible, not exceed 32 KB and further resources like external links, scripts or interactive elements must not be included. You can find a full list of the required elements at Bimigroup.org.

BIMI selector

The BIMI domain *default._bimi.example.com* in this example, starts with the BIMI selector. It serves the mailbox provider to identify and look up the associated BIMI record and logo. The standard selector name is called *default* and is the only one that is currently accepted by the supporting ISPs, Yahoo & AOL in particular.

Theoretically, if you plan on rolling out BIMI to multiple brands using the same sending domain, there is also the option to work with several selectors. However, different selectors would also make a technical adjustment to the email itself necessary. Since this option is still under development and is currently not supported anyway, you should work with different sender domains and thus separate BIMI records to differentiate between brands.

Implementing BIMI

To implement BIMI, do the following:

1. **Authenticating emails**
2. **Creating an SVG logo**
3. **Acquiring a VMC**
4. **Setting up the BIMI record**
5. **Analyzing the results**

Authenticating emails

BIMI requires the authentication of your emails with SPF, DKIM and DMARC. If you are unsure, you can send a test email and check in the email header whether the authentication requirements are met or simply ask your IT administrator. For further information on the required DNS setup, see Setting up your domain on Optimizely World. For information on how to implement DMARC, see **DMARC implementation**.

The BIMI standard requires DMARC on the organizational domain with a DMARC policy set to either *p=quarantine* or *p=reject*. Optimizely strongly recommends the *p=reject* policy.

Additionally, parameters that weaken the DMARC application such as *sp=none* or any percentage below 100 *pct<100* are not allowed.

> **Note:** The BIMI implementation can currently be implemented with the web and mobile clients of Yahoo, AOL and Gmail. For Yahoo and AOL, the DMARC record on the sending domain, even though it is sub domain, is currently sufficient. Gmail, on the other hand, requires the DMARC record on the organizational domain, as is generally defined for the BIMI standard. So that you are on the safe side with future developments, you should implement DMARC on the organizational domain.

Creating an SVG logo

To implement BIMI, you need to create a company logo as a Scalable Vector Graphic. The exact version supported by BIMI is SVG Tiny 1.2 Portable/Secure (SVG P/S). The SVG BIMI logo must

© Optimizely 2022

- be squared and centered
- only include your logo without text and the background should be of a solid color
- should be as small as possible and not exceed 32 KB
- not include external links, scripts, animation, or other interactive elements

Once created, store the SVG image in HTTPS and it is ready to be added to your BIMI record.

> **Tip:** At Bimigroup.org you can find further information on creating SVG BIMI logos and SVG conversion tools.

Acquiring a VMC

The BIMI standard generally provides for the BIMI logo to be validated by a certification body so that its authenticity can be guaranteed. With a Verified Mark Certificate (VMC) they certify the logo owner and make the proof of the certification in the DNS of the sender domain accessible.

A VMC is currently only required for using BIMI at Google, Yahoo and AOL do not require a certificate. So far, the following certification authorities are available:

- Entrust
- Digicert

The BIMI Working Group expects that the acquisition of VMCs will also be possible with other partners in the future.

Setting up the BIMI record

A TXT record with the prefix **default._bimi** must be created for the sender domain for which BIMI is ultimately to be used. The Optimizely recommended entry is as follows:

- **Example domain**. example.com
- **BIMI domain**. default._bimi.example.com
- **Record type**. TXT
- **BIMI record**. v=BIMI1; l=https://www.example.com/logo.svg; a=https://www.example.com/vmc/logo.pem;

Replace *example.com* with your sender domain and *l=https//www.example.com/logo.svg* with the image URL of your SVG image. Note that the URL must be based on HTTPS.

If you do not want to use a certificate and only want to implement BIMI with AOL and Yahoo, the parameter *a=https://www.example.com/vmc/logo.pem* can be omitted.

Analyzing the results

There are tools that you can use to create your BIMI record and/or to verify it afterwards. One of them is the BIMI Inspector provided by Bimigroup.org.

After the successful implementation of the BIMI record, your SVG logo should now be displayed in the participating email clients. Check over time whether the implementation has reduced phishing attempts and improved your email KPIs.

Deliverability glossary

This topic explains the most important terms related to deliverability.

Term	Definition
A	
A Record	A record is short for address records. They are used to map hostnames to an IP address of the host. For the delegated domains in Optimizely Campaign, the A record is set as 193.169.180.193.
Allowlist	An allowlist (formerly whitelist) is a list of IP addresses or domains, that have been verified by email providers or spam filters for sending high quality emails. Senders listed on an allowlist usually benefit from better delivery results.
AMP 4 Email	AMP 4 Email is a technology developed by Google, that allows interactive elements like confirmation, purchase buttons, likes and so on to be added to an email without visiting a website.
ARC	ARC stands for Authenticated Received Chain and helps solve the problem that the DKIM and SPF break during email forwarding.

Term	Definition
Authentication	Authentication in email is a process to verify the identity of a sender using several mechanisms such as SPF, DKIM, DMARC and BIMI.
B	
BIMI	BIMI stands for Brand Indicators for Message Identification. It is a standard that attaches your brand’s logo to your authenticated email messages.
Blocking	A blocking occurs when incoming emails are rejected by the receiving mailbox provider. This is typically due to a temporary reason, such as IP blocklisting or an email content issue. It can affect a mailing, a domain, an IP address, or a whole range of IP addresses.
Blocklist	A blocklist (formerly blacklist) is a list of IP addresses or domains, that have been blocked by email providers or spam filters for sending spam emails, hitting spam traps or a high level of user complaints.
Bot	A bot, short for "robot", is a computer program that operates as a user or other program to automate certain tasks.
Bounce	An email is unable to be delivered. There are two types of bounces: hard and soft.
Bounce Message	An automated message sent by the receiving provider when email delivery fails.
Bounce Rate	The percentage of the non-delivered emails out of the total sent emails.
C	
CAPTCHA	A CAPTCHA is a mechanism implemented in registration forms that allows the owner of the form to distinguish a human being from a bot.
Click Rate	The percentage of the generated clicks out of the total delivered emails.
CNAME	CNAME stands for canonical name. A CNAME record in DNS maps one domain name to another. In Optimizely Campaign the DKIM record of your domains is set as a CNAME record.

Term	Definition
COI	COI is short for confirmed opt-in. When a subscriber signs up for an email service, an email is sent to the subscriber's email address as confirmation of the registration.
CSA	The Certified Senders Alliance (CSA) is an organization of the German Association of the Internet Industry (eco) that manages a whitelist for bulk mailers. It acts as a neutral interface between mailbox providers and senders of commercial emails.
D	
DANE	DANE stands for DNS-Based Authentication of Named Entities. It is a protocol, that lets you securely specify exactly which TLS/SSL certificate an application or service should use to connect to your site. It requires the application of DNSSEC.
Dedicated IP	Dedicated IPs are IPs used exclusively by one sender.
Deliverability	The process of ensuring that email is delivered to the inbox as opposed to being blocked or ending up in the spam folder.
Delivery	Technical delivery occurs when an email is successfully transmitted to the correct email address. Even if your email was delivered to the spam folder, it still counts as a delivery.
DKIM	DKIM stands for DomainKeys Identified Mail. It is a protocol to ensure using a digital signature that the sender is authorized to use the domain for sending and that the message was not tampered with in transit.
DMARC	DMARC stands for Domain-Based Message Authentication, Reporting & Conformance. It is a protocol that uses SPF and DKIM to determine the authenticity of an email message. DMARC can tell a receiving server to or not to accept an email from a particular sender to prevent phishing and spoofing.
DNS	DNS stands for domain name system. It translates domain names into IP addresses and is considered the phonebook of the internet.
DNSSEC	Domain Name System Security Extensions are a set of protocols for securing

© Optimizely 2022

Term	Definition
	information provided in the Domain Name System (DNS).
DOI	DOI stands for double opt-in. A subscriber must confirm his subscription two times before his address is added to a recipient list.
Domain	A domain is the registered name that emails are sent from.
E	
Encryption	Encryption in email means to convert a message to be sent into code to prevent unauthorized access through third parties during transit.
ESP	ESP is short for email service provider. An ESP is a company that offers email marketing solutions or bulk mail services. Optimizely is considered an ESP.
F	
Feedback Loop	Some ISPs offer a so-called Complaint Feedback Loop that allows senders to receive a report every time someone marks their email as spam or junk. Recipients who mark your email as spam are then automatically added to the account blocklist in Optimizely Campaign.
G	
GDPR	The General Data Protection Regulation is designed to protect the privacy of all EU citizens, including when those citizens engage with businesses located outside the European Union, by imposing regulations around personal data.
Google Postmaster Tools	Google's reputation monitoring tool is used to monitor IP reputation, domain reputation, spam complaint rate, authentication success and more for campaigns sent to Gmail.
Greylisting	Email greylisting is a method of protecting email users from suspicious emails with a temporary block. By the next retries, the mails will be accepted. A legitimate SMTP server makes multiple attempts to resend these emails, while its use is uncommon among spammers.

© Optimizely 2022

Term	Definition
H	
Hard bounce	A hard bounce is a permanent bounce that occurs when an email account is no longer valid.
Header	An email header is a code snippet that contains information about the sender, the recipient, the email's route to the final mailbox, authentication details and other important information.
Honeypot	A honey pot in registration forms is an additional content field invisible to human beings but usually filled out by bots during a list bombing attack. It is isolated and used to detect and block abusive attacks on registration forms.
HTML email	HTML stands for Hyper Text Markup Language. An HTML email is designed with graphics, colors, tables, links and more.
I	
Inbox Placement	An email is accepted into an ISP's network and is delivered to the inbox.
IP Address	An IP address is a number listed in the domain name system that sends mail on behalf of a domain name. In email marketing, the IP address identifies the sender and carries a reputation that helps ISPs determine whether they should deliver a senders emails or not.
ISP	ISP stands for internet service provider. An ISP is an organization that provides services for accessing, using, or participating on the internet. It is the place where recipients have set up their email accounts.
L	
List bombing	List bombing refers to a practice of abusing and attacking email list subscription pages by bombarding them with a large number of email addresses at the same time.
List help	The list-help header is an email header that can be added to emails sent via Optimizely Campaign. It includes a URL showing further details on the receipt of the email.

© Optimizely 2022

Term	Definition
List hygiene	List hygiene is the practice of continuously cleaning and maintaining a contact list to ensure all email addresses are actively engaging with the content and are receiving their emails without issues.
List unsubscribe	The list-unsubscribe header is an email header added to emails sent using Optimizely Campaign. It allows subscribers to see an embedded unsubscribe button or link they can click if they would like to stop receiving further emails.
M	
MTA	A Mail Transfer Agent (MTA) is a mail server software for sending business-critical high-volume emails.
MTA-STS	MTA-STS stands for Mail Transfer Agent Strict Transport Security and is a mechanism instructing SMTP servers to only communicate with encryption.
MX record	MX record is short for mail exchange record. It maps a domain name to a list of mail transfer agents for that domain. For the delegated domains in Campaign, the MX record and thus, Optimizely's mail server receiving responses for example, is set to *mail.srv2.de.*
O	
One-click-unsubscribe	One-click-unsubscribe allows a subscriber to opt out simply by clicking a link in the email and taking no further action or confirmation. The list-unsubscribe header is intended to be "one-click".
Open rate	The percentage of subscribers who opened an email out of the total number of subscribers that received it.
Opt-in	A person subscribes to an email list and explicitly gives a brand permission to send them emails.
Opt-out	A recipient withdraws the advertising permission from the sender, for example by clicking the unsubscribe link, in order not to receive any further promotional emails from the sender.

© Optimizely 2022

Term	Definition
P	
Phishing	Phishing is a cybercrime in which targets are contacted by email, telephone, or text message by someone posing as a legitimate institution to lure individuals into providing sensitive data such as personally identifiable information, credit card details and passwords.
Pristine spam trap	A pristine spam trap is an email address that was never a real email address in the first place. Instead, it is an address that was set up by an email provider or security company for the sole purpose of monitoring and catching spammers.
PTR record	See Reverse DNS.
R	
Recycled spam trap	Recycled spam traps are email addresses that were previously owned by legitimate subscribers. Since owners abandoned them for an extended period, they were converted into spam traps by the mailbox provider.
Re-engagement campaign	A re-engagement campaign is a focused effort to reactivate your inactive leads, usually by including incentives.
Return path	The return path is an email header that indicates where and how bounced emails will be processed.
Return path certification	The Return Path Certification, now part of Validity Inc., is based on a commercial allowlist providing delivery benefits at major mailbox providers like Microsoft.
Reverse DNS (rDNS)	Reverse DNS, also called the PTR record, does the opposite of DNS. It resolves an IP address to a host name.
S	
Sender domain	A sending domain is a domain that is used to indicate who an email is from via the "From:" header.

© Optimizely 2022

Term	Definition
Sender reputation	Sender Reputation is a score assigned to a sender based on the quality of his emails, including metrics like spam complaint rates, spam trap hits and email authentication. Based on this score, the ISP decides if an email will be delivered to the inbox, the spam folder, or not at all.
Shared IP	Shared IPs are IP addresses that multiple senders use.
SMTP	SMTP stands for Simple Mail Transfer Protocol for transferring emails over TCP/IP networks.
SNDS	Smart Network Data Services is the name of the Microsoft reputation monitor, providing the data needed to understand and improve sender reputation at Microsoft domains, such as Outlook and Hotmail.
Soft bounce	A soft bounce usually occurs due to server-related problems, such as technical issues on the receiver side, spam-related issues like suspicious content elements or a problematic sending strategy and is typically temporary.
SOI	SOI stands for single opt-in. A subscriber is added to a mailing list right after he enters his email address and clicks "Subscribe".
Spam	Unsolicited emails.
Spam complaint	Recipients mark an email as spam or junk or report it to an anti-spam organization.
Spam filter	A software that processes all incoming emails, detects potentially dangerous elements such as viruses, malware but also spammy content elements and prevents them from being forwarded to recipient mailboxes.
Spam trap	A spam trap is an email address that is owned or used by ISPs, anti-spam organizations or blacklist operators to detect and catch spammers.
SpamCop	SpamCop is a spam reporting service. Any users who receive unsolicited email can report these to SpamCop. Once SpamCop has identified the sender as spammer, the sending IP is added to the SpamCop Blocklist.
Spamhaus	Spamhaus is a non-profit organization to track email spam. They operate vari-

Term	Definition
	ous blocklists including SBL (Spamhaus Block List), XBL (Exploits Block List), PBL (Policy Block List), and DBL (Domain Block List). These lists are used by public ISP and can lead to extensive blocking.
SPF	SPF stands for sender policy framework and is an email authentication method used by mail servers to verify the sender during the delivery of the email. The SPF record lists all IP addresses authorized to send on behalf of the "From" domain.
Spoofing	Email spoofing is the forgery of a brand, of email content and/or the email header so that the message appears to have originated from a person or entity either known or trusted by the receiver.
Sub domain	Sub domains are parts of primary domains and are created with a sub domain name and a dot before the primary domain. For instance, the primary domain example.com could have a sub domain called web.example.com.
Subject line	The headline of an email that appears in an inbox before a subscriber opens it.
Subscription	See Opt-in.
T	
Throttling	Some ISPs limit (throttle) the amount of email they accept from a particular sender, during a specified period of time.
Tracking pixel	A tracking pixel is an HTML code snippet which is loaded when a user visits a website or opens an email. Using tracking pixels, activity can be measured.
Transactional email	Transactional emails are real-time, automated emails sent to users after a certain action takes place on a platform, app, or website. These are also called triggered emails.
Trusted Dialog	Trusted Dialog is a quality standard for mass digital communication provided by United Internet. It ensures the inbox placement at 1&1 domains and Freenet.

© Optimizely 2022

Term	Definition
TXT record	TXT record stands for text record. TXT records hold free form text of any type and are used to set mechanisms for email authentication.
U	
Unknown user	The term *unknown user* or *invalid user*, especially in bounce messages, refers to non-existing email addresses.
Unsubscription	See Opt-out.
User engagement	User engagement includes all sorts of activity carried out by recipients in emails, such as opens, clicks, forwards, but also spam markings and deletion. It is a metric used by ISPs to decide about a sender's reputation.
UWG	The German Law Against Unfair Competition (Gesetz gegen den unlauteren Wettbewerb) that regulates unreasonable harassment and the sending of commercial emails without opt-in as an exception.
W	
Warming	The warming is the process used to build a good reputation with ISPs, especially when starting as a new sender. It is especially important if you are sending from a dedicated IP address and/or dedicated sending domain.

Exclusive IP addresses

> **Note:** To enable this feature, contact customer support.

If you want to send mailings from exclusive IP addresses instead of the default Optimizely IP address pool, you can lease one or more IP addresses. These addresses are reserved to send mailings exclusively from your client. Within 30 days, a reputation trend is visible. The dispatches of other clients have no influence on the reputation of your IP addresses.

© Optimizely 2022

> **Tip:** A Return Path certification requires exclusive IP addresses.

ISO 27001 certification

Optimizely Campaign's safety management

The ISO/IEC 27001:2013 certification by TÜV Süd gives you as a user the guarantee that Optimizely's safety management for operation, service and development of email marketing platform complies with internationally recognized standards regarding data and information security.

In external, multi-stage audits, processes sensible to set up, implement, execute, control, maintain and optimize information security are evaluated.

In addition to the evaluation of the technical and organizational processes, the handling of information within the company was scrutinized, for human error has to be taken into account and made safe.

Your advantages

The internationally recognized certification for information systems according to ISO/IEC 27001:2013 gives you safety and comparability with other systems when choosing the email marketing service provider that suits you best. With this certification, you can be sure that your data is hosted, stored and protected against unauthorized access at Optimizely according to defined, approved standards. The certification also covers the operation and support of Optimizely's dispatch infrastructure. In these aspects, Optimizely Campaign scores with a highly available, fail-safe and powerful system.

What does ISO/IEC 27001:2013 mean?

ISO/IEC 27001:2013 is a standard for an information security management system that checks and evaluates the following areas and assets:

© Optimizely 2022

1. **Information security management**. Information security management evaluates processes, their functionality and infrastructure of Optimizely Campaign by identifying possible threats, risk handling and responsibilities. It represents the current state and serves as a base for the PDCA guidelines for continuous improvement of information security.
2. **PDCA guidelines for continuous improvement of information security**. These guidelines for the **P**lan-**D**o-**C**heck-**A**ct process define in four phases the suitable measures to determine and evaluate information security; the measures to be implemented and realized; how these measures and their effectiveness can be verified constantly; and finally how these measures can be maintained, improved and fixed during operation.
3. **Inventory sheet**. Assets of the company are registered here. Each asset is evaluated regarding its priority for information security. Next, a procedure directory is created, which contains and describes all processes related to this asset.
4. **Risk measure matrix**. In this matrix, all implemented security measures are correlated to a concrete risk. With this matrix, the remaining risk can be determined and thus assured that only a minimal acceptable remaining risk will occur at any time in any process.
5. **Compliance**. This aspect ensures that all processes are defined within the legal range and in compliance with the standards set by the legislature.

Who certifies all this and how is the process conducted?

The certification is a multi-stage process and is executed by an external service provider. The certification of Optimizely Campaign was executed by TÜV Süd. The certification process involves the following steps and phases:

1. **Assessment for certifiability**. Done prior to the actual certification.
2. **Certification audits by TÜV Süd**. Multi-stage audits in all security relevant areas and divisions of the company.
3. **Verification audits**. Yearly audits, which guarantee the compliance with all standards. These audits also verify that the information security management is being improved and developed further. This is a requirement for the certification.
4. **Recertification**. Every three years, the certification is renewed in an audit similar to the certification audit (see number 2).

Apple Mail Privacy Protection

Apple's current operating system versions iOS 15, iPadOS 15, macOS Monterey and watchOS 8 include the Apple Mail Privacy Protection. The new privacy features restrict the transmission of tracking information to Optimizely Campaign.

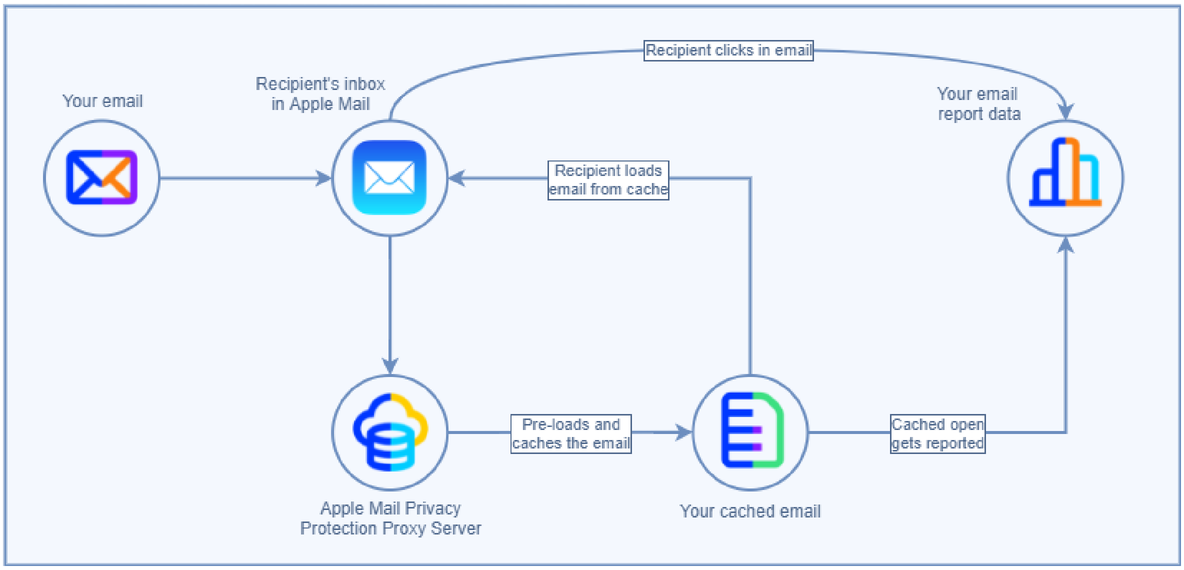
Other email and webmail apps, such as Gmail or Outlook, are not affected by Apple Mail Privacy Protection. However, if your email recipients use Gmail account via Apple Mail, for example, the privacy features - if activated - also affect them.

> **Tip:** For more information, see Apple Mail Privacy Protection FAQ.

How it works

Apple users decide in Apple Mail whether to enable Apple Mail Privacy Protection. If enabled, Apple Mail Privacy Protection prevents Optimizely Campaign from tracking email recipients' opens by using invisible tracking pixels.

Apple caches tracking pixels and external content and automatically generates email opens. Apple masks the IP address of the email recipient via proxy servers and prevents the identification of the location and the device as well as the link with other online activities.



How it affects your email marketing

The open rate in connection with Apple Mail loses considerable significance. Since Apple caches the emails and fakes opens, the open rates will be higher and the click-to-open rate (CTOR) lower.

Affected are marketing processes and strategies that use the open rate as a trigger or segmentation criterion, as well as A/B tests in which, for example, a decision is made between two email subject line variants.

> **Tip:** You can still perform subject line and A/B tests. Note the following tips:
>
> - Select larger segments (based on the proportion of Apple Mail users in your mailing list)
> - Exclude detected Apple Mail users
> - Use the adjusted open rate as a criterion
> - Use clicks or conversions instead of opens as a criterion

Further impact:

- **Send time optimization**. The click behavior of the recipients concerned is considered the decisive criterion instead of the opens.
- **Cluster recipients by activity**. This feature is less accurate when only the open rate is considered.
- **Dynamic content**. The loading time when opening dynamic content (e.g. product recommendations or animated GIF countdowns) is falsified.

Measures by Optimizely Campaign

Optimizely Campaign detects automatically generated opens and excludes them from the KPI analysis for reports, which reduces the open rate. The more users use Apple's new operating system versions, the greater the proportion of automatic opens that are filtered out.

> **Tip:** You can download all automatic opens as a CSV file using response data export. To do this, contact customer support.

By filtering automatic opens, opens in Apple Mail are determined based on clicks only. This means that Apple Mail users are not included as synthetic opens in reporting until they click within the email.

> **Note:** Target groups and triggers that check for non-openers will (incorrectly) classify more recipients as non-openers than before and will no longer be reliable. Therefore, adjust your target groups and campaigns.

Planned measures

Optimizely Campaign is continuously working on solutions to best respond to the Apple Mail Privacy Protection. The following measures are planned:

- Target groups for evaluation and segmentation of the distribution list based on automatic opens

- Automatic opens as a measure in Deep Analytics

> **Tip:** You can determine the proportion of Apple Mail users in Deep Analytics by using the **Opens (Absolute)** measure and the **Operating System** > **iOS** or **Mac** and the **Operating System Version** groupings for your report. See **Creating report templates**.

Service description

Optimizely Campaign lets you run dialog marketing campaigns on channels and send professional marketing messages by email, Mobile Push, Web Push, or SMS from a single software package.

Optimizely Campaign comes fully integrated with the tools for one-to-one dialogs with your customers:

- Omnichannel marketing campaigns
- One-shot campaigns
- Marketing Automation
- Transactional mails
- Easy creation of professional mailings
- Opt-in processes
- Recipient management
- Powerful segmentation and analysis tools that let you analyze the success of your mailings for each recipient, and generate reliable data for your marketing research.

Optimizely Campaign communicates with your web shop, customer relations management system or web analytics service provider to do the following:

- Automatically display products from your web shop in your messages
- Create target groups
- Create personalized product recommendations
- Consolidate your customer relationships through successful closed-loop marketing

Optimizely Campaign is TÜV-certified as compliant with ISO 27001 and a member of the Certified Senders Alliance (CSA).

Omnichannel marketing

Reach your customers on channels with flexible tools for successful omnichannel marketing – using a single provider.

- Email campaigns
- SMS campaigns
- Push campaigns
- Multi-channel campaign automation
- Separate blocklist management for each channel

Email

Optimizely Campaign virtually sends your emails in real time. Optimizely Campaign also comes with deliverability management, which significantly increases deliverability rates.

Range of features

- Sending speeds of up to 50 million emails per hour; more than 90% of emails delivered within the first minute.
- Comes with email throttling to let you, for example, avoid unusually high traffic to your website and stagger customer visits for campaigns that are likely to attract a lot of interest (such as special offers, prize draws, or surveys)
- Enhanced HTML layout for ensuring emails are correctly displayed in webmailers and email programs
- Mobile Fusion provides responsive design for optimized display on mobile end devices
- Auto generated text version
- Auto generated online version
- Landing pages
- Can be personalized
- Web forms for allowing recipients to register and recipient management

© Optimizely 2022

- SWYN (share with your network) provides sharing mailing content on social networks (Facebook, Twitter, WhatsApp, Xing) and via email.

SMS

SMS provides seamless integration of messaging to reach your customers.

- Supports GSM and UCS2 coding for international character sets
- Capable of sending multi-part SMS (concatenated SMS)
- Direct message routing to 12 countries
- Standard number-based sender identification
- Speed-dial number-based sender identification
- Alphanumeric character-based sender identification
- Can be personalized

Mobile Push

Mobile Push sends automated push messages and reaches every customer who has your app on their smart phone or tablet.

- Available for Android and iOS
- App-based opt-in methods
- Can be personalized

Web Push

Web Push sends automated push messages and reaches your customers when they open a web browser.

- Available for the most important web browsers
- Can be personalized
- Preview function

Campaign management

Smart Campaigns

Smart Campaigns have a convenient front-end for one-shot campaigns. Navigation paths and click paths are optimized for maximum efficiency.

- Create campaigns with drag and drop
- A/B tests and automatic send function for the best performing message
- Six criteria for selecting the best split
- Allows campaigns to be worked on by several users simultaneously
- Designed for creating email, SMS and push campaigns
- Create campaigns from message templates
- Reuse successful campaigns with a single click
- Integrated pre-campaign recipient-path-analysis
- Integrated post-campaign reporting
- Select send dates and delayed delivery in line with A/B test results
- Send messages to specific target groups or a limited number of recipients
- Optimizely Campaign throttling

Marketing Automation

Marketing Automation lets you automate frequently recurring customer dialogs, such as welcome and happy birthday messages, reactivation campaigns, abandoned cart emails, and much more. Marketing Automation event and date-triggered mailings increase conversion rates and let you analyze recipient flows and activities in real time. Marketing Automation furthermore comes with an automated feature for changing recipient data and moving or copying recipients to different recipient lists.

- Create Marketing Automation campaigns with drag and drop
- Omnichannel. Send out email, SMS, Web Push and Mobile Push messages to different end devices and target groups from a single Marketing Automation campaign
- Create automatic lifecycle marketing campaigns
- Send out activity and event-based mailings from a single campaign

- Actively run multiple campaigns simultaneously
- Link multiple campaigns, for example, by automatically assigning recipients from one campaign to another
- Modify campaigns while active
- Post-click-triggered campaigns
- Integrated campaign recipient-management (updating, moving and copying recipients/recipient data)
- Integrated campaign reporting for active campaigns – monitor the number of recipients who passed the individual campaign nodes at any time

Transactional mails

Transactional mails are triggered by recipient actions or events, such as an anniversary. Optimizely Campaign sends transactional mails using a high-performance API (application programming interface). Transactional mails can be activated in Marketing Automation or sent through the REST, SOAP or HTTP API.

- Sent through Marketing Automation
- Can be sent as email or SMS
- Sent in real time using high-performance interfaces
- Can be personalized
- Can send personalized attachments (HTTP API only)

Opt-in processes

Opt-in processes lets you create and manage your opt-in mailings with Optimizely Campaign and make them reflect your corporate design. The integrated reporting feature lets you check the number of recipients who completed the registration process.

- Creation and administration of multiple opt-in mailings in your Optimizely Campaign client
- Sent in real time using the transaction API
- Edit contents while the registration confirmation is active
- Can be personalized

Content management

Our intuitive content management system (CMS) lets you create appealing, ready-to-send mails in no time. The modular design makes it easy to insert text and images. You can preview content on different devices (email, web, mobile) while editing. The content management system also can be used to define personalized and group-specific content.

- WYSIWYG (what you see is what you get) editor
- Source text editing
- Import mailings as zip archives
- Automatic text version generator
- Creating, managing, and changing landing pages
- Content reports for link validation
- Automatic link extensions for click tracking
- Manage HTML, text, and mobile link tracking
- Personalized and target group-specific subject lines
- Automatically creates online version
- Attachments

> **Note:** The following features are optional. Contact customer support for more information.

- Sending images with offline HTML
- Personalized attachments (only when used with transactional mails and the HTTP API)

Template Kit

Template kit lets you define the layout and appearance of the elements in your mailing, to which you can copy or move content blocks via drag and drop. The basic mailing elements (such as, sender information) are predefined to create new mailings and make them less error-prone.

- Predefined pre-header, header, body and footer sections
- Grouping paragraphs for creating flexible layouts (1- or 2-column)

- Paragraph types for essential applications
- Target groups and click profiles for use at paragraph level
- Nine fonts to choose from
- RSS feed integration
- Content interface
- Adding links to social networks (SWYN)
- Mobile Fusion for responsive web design – to ensure that your mailings are optimally displayed on mobile devices, with a preview function for conventional device formats
- Separately editing HTML, text, and mobile mail versions
- Click2Go is a button generator for adding buttons or call-to-action elements in a design-consistent layout, conveniently and directly to your template
- Easy edit – split-screen view for previewing the mailing
- Inline editing – editing texts directly in the mailing preview
- Easy Copy lets you copy and paste individual elements from other mailings or clients

> **Note:** The following features are optional. Contact customer support for more information.

- Installing additional standard web fonts
- Custom fonts – installing user-defined fonts

Custom mailing content templates

Custom content templates are set up by customer support on request. Custom templates are based on your corporate design and style guide and ensure that your newsletters appear exactly as intended on recipient devices.

- Template with your corporate design
- Template modules designed in line with your design specifications
- Layout and design principles based on your style guide
- Available features in the Template Kit can be integrated into individual templates

© Optimizely 2022

Coupon system

Coupon system lets you reward mailing recipients with promo coupons. Adding a machine-readable bar code or QR code to your mailings will allow your customers to redeem coupons at their local store.

- Uploading static coupon blocks – if you want to define the structure of individual codes and number of codes per block
- Dynamically generated coupon blocks – if you want Optimizely Campaign to automatically generate a new, unique coupon code for every email
- Bar code blocks with editable layouts (width, height, line weight) based on EAN 13
- Creating QR codes
- Static block thresholds for triggering mails
- Deleting unused codes from static blocks
- Downloading coupon code assignments

Countdown timers

Countdown Timers display the days, hours, minutes and seconds remaining to when your offer ends to increase the attention of your recipients and conversion rate.

- Supports static and animated countdown timers
- Editor for designing, editing, and managing countdown timers
- Field function for mailing integration

Segmentation

Target groups

Successful dialog marketing: Target, attract, inform and engage your customer segments with custom content. Optimizely Campaign helps you define target groups to ensure that your mailing content and subject lines are relevant to every one of your recipients.

- Recipient-based filter criteria, which can be based on any recipient list field
- Action-based criteria, such as clicks, open, hard and soft bounces, and post clicks

- Campaign-based criteria for linking several Marketing Automation campaigns
- Use of operators: contains, starts with, ends with, equals
- Use of mathematical operators for numeric fields
- Use of time-based operators for date fields
- Boolean operators (`true` or `false`)
- Instant target group analyses
- Ad-hoc target groups created from Live Analytics segments with a single click

Click profiles

Categorize your recipients' clicking behavior with click profiles. Rule-based click profiles provide information about your campaign's performance, instead of complex individual mailing and campaign analyses.

- Cross-campaign click profiles
- Manually assign click profiles
- Rule-based click profile assignments based on wildcards
- Rule-based click profile assignments based on regular expressions

Analysis tools

Performance Dashboard (Beta)

The Performance Dashboard (Beta) lets you display KPIs using charts for visually appealing presentations of your mailing activities.

- Various charts available: KPI chart, basic chart and bubble chart
- Time-based and mailing-based analysis
- Individually customizable

Deep Analytics

Deep Analytics provide in-depth and highly detailed mail-based reports about your campaigns' success to effectively targeting your recipients and further develop your omnichannel marketing.

- User-friendly report builder with graphical interface
- Create reports with drag and drop
- Choose from up to 28 analysis measures
- 13 groupings
- Predefined basic reports for campaign and progression-based analyses
- Automatic raw data analyses for reports based on high-performance database algorithms
- Post-click analyses with external web analytics tools
- Global report parameters based on clients, time intervals, target groups, mailings and mailing types
- Choose from different diagrams (bar charts, line charts, regional and pie charts)
- Aggregation of comprehensive reports in pivot tables
- Seamless integration with Microsoft Excel
- Configurable report templates in your corporate design
- Automatic report generation and distribution by email

Live Analytics

Live Analytics lets you generate recipient-based reports and create real-time RFM analyses to boost your campaigns' profitability and return on investment (ROI).

- Analyze data by recipient lists, list fields, and target groups
- Edit analysis fields in real time in the detail view
- RFM analyses for boosting your sales
- Graphical representations and segment
- Funnel analysis segments of a diagram with a single click
- Create target groups with a single click

Deliverability preview

The deliverability preview lets you check your mailing before dispatch, whether the contents are displayed correctly and whether your mailing has been classified as spam by the most common email providers.

© Optimizely 2022

- Preview how the graphics and fonts in your mailing are displayed by the most common email providers and browsers
- Check spam suspicion with the most common email providers

Post-click tracking

Post-click tracking lets you analyze actions by email recipients on your website, like clicks on products or canceling of orders. Use Deep Analytics to analyze and display the generated data.

- Filter by date or time range
- Import mailing-independent customer actions
- Integrate external web analytics software

Visual link analysis

Visual link analysis instantly shows the number of times the links in a mailing were clicked. The analysis is performed directly inside the mailing itself, which means that you can see whether links in particular locations are clicked more or less frequently.

- Analyzes absolute and unique clicks
- Proportional analysis based on recipients or clicks
- Visual link analysis of post clicks

Attention analysis

Attention analysis let you assess the impact of your mailings, templates, and landing pages' layout on viewers. Based on eye-tracking, this tool graphically represents analysis results which indicate if the most crucial elements of your mailing (logo, offer price and period, call-to-action) are located to effectively attract the viewer's attention.

- Perception map analyzes which features of a mail a viewer focuses on first
- Attention map for analyzing which elements in your mail attract the most attention
- Visual attention prediction for predicting the order in which mailing elements attract attention

- Analysis of draft layouts of existing mailings or screen shots means layouts can be optimized during the design phase

Activity overview

Activity overview shows mailings for a defined period in a single, clearly laid-out screen. This lets you obtain information relevant for evaluating your marketing activities, such as which customer dialogs you have sent, are currently sending, and are about to send.

- Evaluate multiple clients at once
- Filter by mailing types, media types (marketing channels) and mailing status
- Transactional mails and registration confirmations are supported

Integrations and additional functions

Optimizely Campaign seamlessly integrates all major web analytics, e-commerce and CRM systems. You can use programming interfaces (APIs) and extend Optimizely Campaign with various additional functions. In addition, Optimizely constantly develops new custom features for you.

Web analytics integration

Optimizely Campaign seamlessly integrates commonly available web analytics tools. Benefit from bi-directional data exchange: The most important statistics are sent to the analytics software, and segments relevant for your Optimizely Campaign remarketing campaigns are available in the feedback channel.

Google Analytics

You can use Google Analytics to monitor the success of your marketing campaigns and further optimize them. Optimizely Campaign sends mailing and campaign parameters to Google Analytics. The Google Analytics dashboard gives you access to campaigns and an overview of the costs and revenues related to your campaign.

- Unidirectional data exchange
- Mailing ID, mailing name and description, mailing type, and dispatch date are transmitted

© Optimizely 2022

- Recipient list fields are transmitted
- Time and campaign-based analyses available in Google Analytics

Google Tag Manager

With Google Tag Manager you can implement tracking codes and conversion pixels on your website and create data about user actions. By using the integration you can transfer this data to Optimizely Campaign.

- Identification of customers/recipients via the RecipientID
- Data transfer to Optimizely Campaign
- Creation of target groups in Optimizely Campaign

intelliAd

IntelliAd integration for Optimizely Campaign lets you evaluate your email campaigns using intelliAd.

- Unidirectional data exchange
- Link tracking using link extension
- Analysis of clicks over time for just the email channel or together with other marketing activities in the intelliAd dashboard

E-commerce integration

Securely send order and dispatch notifications, double-opt-in emails, or entire campaigns. Seamless and automatic **E-commerce integrations** with Optimizely Campaign matches recipient data and recipient status and imports product data directly into your message template. You further benefit from the performance and reputation of Optimizely's dispatch infrastructure.

Magento 1 integration and Magento 2 integration

Take advantage of the performance available from Optimizely Campaign in combination with the Magento e-commerce platform. The Integration includes synchronization of recipient data including logins and logouts, export of the product catalog, and sending transactional mails via SMTP and HTTP.

- Available for Magento CE 1.7 to 1.9, Magento EE 1.12 to 1.14, Magento CE 2.0 to 2.1
- Processing of subscriptions and unsubscriptions via Optimizely Campaign
- Synchronization of recipient status between the shop system and Optimizely Campaign
- Transfer of further recipient data from the shop to Optimizely Campaign to personalize your mailings
- Adaptability of the data model for data exchange
- Multi-client capability through support of subshops and storefronts
- Sending transaction mails via the SMTP API
- Sending transaction mails via the HTTP API using the templates in Optimizely Campaign
- Export of the product catalog as CSV file for use during mailing creation
- Configurable confirmation pages
- Transfer of further data fields from the web shop to Optimizely Campaign for further personalization of your mailings

Shopware

Take advantage of the performance available from Optimizely Campaign in combination with the Shopware e-commerce platform. Recipient data is automatically synchronized – including registrations and canceled subscriptions.

Shopware integration also exports the product catalog from your web shop to Optimizely Campaign and makes product data available in your template via a content interface. Use the features of Optimizely Campaign to personalize, automate and evaluate newsletters for targeted cross and up-selling. Benefit from high delivery rates and the reputation and performance of Optimizely's dispatch infrastructure.

- Available for Shopware Professional and Professional Plus
- Newsletter registrations and subscription cancellation processes
- Newsletter containing dynamic shop products
- Configuration of multiple clients
- Automated, cyclical product data import
- Send transactional mails via Optimizely Campaign

© Optimizely 2022

CRM integration

Bi-directional CRM integration lets you send campaigns to your contacts and leads using Optimizely Campaign. Personally address your customers with customized content and evaluate the success of your campaigns directly from within your CRM system.

Mirosoft Dynamics CRM

Plan, start, evaluate successful campaigns in Mirosoft Dynamics CRM and benefit from the power and above-average delivery rates of Optimizely Campaign: Use your comprehensive CRM database to create email and SMS newsletters with high conversion rates. Use your data to generate extensive and original customization. Delivery and a perfect layout are guaranteed. The bi-directional connection means you can monitor success directly from within your CRM system.

- Available for Mirosoft Dynamics CRM and On-Premises
- Supports Mirosoft Dynamics CRM versions 2015, 2016 and Mirosoft Dynamics 365
- Omnichannel campaigns via email and SMS
- High-performance dispatch infrastructure with excellent delivery rates
- Precisely measure the success of CRM campaigns
- Transfer personal data from the CRM such as salutation, name, city and post code
- Import response data in your CRM such as openings, clicks, returned emails, canceled subscriptions and bounces

Salesforce

Plan, start, evaluate successful campaigns in Salesforce and benefit from the power and above-average delivery rates of Optimizely Campaign: Use your comprehensive CRM database to create email and SMS newsletters with high conversion rates. Use your data to generate extensive and original customization. Delivery and a perfect layout are guaranteed. The bi-directional connection means you can monitor success from within your CRM system.

- Available for Enterprise Edition, Unlimited Edition, and Performance Edition
- Omnichannel campaigns via email and SMS

© Optimizely 2022

- Export standard segmentation and personalization fields from Salesforce into Optimizely Campaign
- Export additional customer-specific fields to Optimizely Campaign
- Multi-stage campaigns in Salesforce
- Automatic response data synchronization

APIs

Smart and flexible: Optimizely Campaign offers a range of comprehensive programming interfaces (APIs) to automate your marketing activities.

REST-API

The REST API is a convenient alternative to the SOAP API that lets you manage and control Optimizely Campaign features from external systems by using HTTPS requests. In contrast to the SOAP API, you can also manage Smart Campaigns. In total, Optimizely provides more than 200 operations in over 16 different web services for this purpose. You can retrieve data from and send data to Optimizely Campaign via REST API. See the Optimizely Campaign SOAP API documentation for information.

- Bi-directional secure data exchange
- Almost all features of Optimizely Campaign can be executed
- Over 16 web services and more than 200 operations available
- Webhooks for receiving real-time event data on your mailings

SOAP API

The SOAP API lets you control Optimizely Campaign from external systems using a variety of programming languages and environments. More than 250 operations in 18 different web services are provided for this purpose. The interface is bi-directional. Data can be both retrieved from and sent to Optimizely Campaign. See the Optimizely Campaign SOAP API documentation for information.

- Bi-directional secure data exchange
- Almost all features of Optimizely Campaign can be executed
- 18 web services and more than 250 operations available

© Optimizely 2022

- Optimizely Campaign provides pre-configured programming libraries for Java and PHP to make connecting external systems easier

HTTP API

The HTTP API can be used to register new recipients, manage blocklists and subscription cancellation lists, for personalized tracking and for sending trigger and transactional mails – also with personalized attachments. The HTTP API operations can be embedded into emails, web forms and online shops. See the Optimizely Campaign HTTP API documentation for information.

- Secure integration and data exchange
- Easy to configure API calls
- Confirmation of execution is returned for each operation
- Can be used in emails and web forms
- Transfer personal data for sending personalized transactional mails
- Personalized attachments (for example PDFs)
- High-performance transactional API for high volume dispatch

SMTP API

The SMTP API offers a simple solution for sending campaigns via the high-performance infrastructure and lets you benefit from the reputation of the Optimizely Campaign server. After setting up a special SMTP client, you can continue to create your mailings using your usual software package. Mailings are sent via Optimizely's high-performance server that is recognized by major providers. You benefit from the reputation and performance of Optimizely Campaign with minimal modifications.

- Above-average high email delivery rate and sender reputation
- Monitor the mailing process using Optimizely's deliverability experts
- Seamless integration into existing system architectures
- Mailing creation and recipient management continue to be carried out in your current system—no need to retrain staff

Additional interfaces

Content interface

Link external product databases to the content interface or content management system to display your shop products in your mailings. Just a few clicks are needed to create your product offer: the Optimizely Template Kit provides pre-configured paragraphs for linking and creating layouts for product data according to your corporate design guidelines.

- Product paragraph for embedding individual products
- Content interface paragraph for embedding several grouped products
- Up to 10 text elements per article
- Up to 3 links per article
- Up to 6 images per article
- XML and CSV formats
- HTML/CSS formatting

Translation interface

The translation interface from Optimizely Campaign lets you send the texts for your mailing to a translation service provider. The service provider returns the translated content. Your mailing templates apply the relevant language to ensure that a localized mailing is sent to each target market.

- Data exchange using standard XML format
- Link to practically all translation providers
- Automatic creation of mailings in target language
- Automatic requests for the status of a translation ensures that mailings are only sent when the translation is complete

Closed-loop Interface

The bi-directional and flexible closed-loop interface lets you integrate data from your data warehouse or campaign management system into Optimizely Campaign. The import module is used to send selected recipients and personal data to Optimizely Campaign. A mailing filled with this data is then sent. The export module provides send and response data for the feedback channel. This data is automatically fed back to your system.

- Secure data exchange over SFTP or SOAP API
- Import and export using the standard CSV format
- Referencing of content, for example, image stored on remote systems possible
- Import personalization information and product recommendations
- Automatically generate a send log and response data (openings, clicks, returned emails, canceled subscriptions) for export to the feedback channel

FTP interface

This high-performance and universal interface lets external data storage systems to securely synchronize with Optimizely Campaign.

- Import and export large amounts of data in CSV format
- Secure data transfer via an SFTP connection
- Import data at regular intervals or when changes are made
- Automatic further processing of data by clients
- Import and export recipients, canceled subscribers, blocklists and multiplier lists

Dispatch and deliverability

Dispatch

You can send messages (even high volumes of messages) immediately or use delayed dispatch. You can also split mailings and send different content to different target groups.

In addition, you can test every message before sending it. To do so, select a number of test addresses and lists, start separate tests for text, HTML, and multi-part messages, and simulate the messages' dispatch to the different groups.

- Sending speeds of up to 50 million emails per hour
- Throttled dispatch (for example, for campaigns likely to drive a high level of traffic to your web shop). Throttled dispatch lets you control and manage follow-up traffic.
- email can use international ISO-8859-1, ISO-8859-2 or UTF8-compliant character sets

- SMS message routing to 12 countries
  - SMS delivery using international GSM and UCS2 data coding

    > **Note:** The following features are optional. Contact customer support for more information.

  - Target group-based SMS delivery to specific regions using telephone dialing codes
  - SMS delivery with sender recognition using individual short codes (on request, exclusive code) or long codes

Send time optimization

Customize the time your messages are sent. The send time optimization identifies when your recipients interact with their inbox, and sends your message when they are most attentive.

- Available for Smart Campaigns
- Available for A/B tests
- Self-learning algorithm, continuously adapts to recipient behavior
- Very flexible, virtually infinitely adjustable for up to 7 days
- Analysis function evaluates individual dispatch times
- Fallback time for new recipients for whom behavior data is not yet available

Deliverability management

Optimizely's deliverability team monitors mail delivery and takes proactive action to ensure high sending rates. This includes collaborating with providers and organizations to develop optimal strategies for improving deliverability – regardless of the growing complexities of spam filters. See also Best practices for good deliverability.

- Active deliverability management and monitoring
- On-boarding deliverability – Optimizely's deliverability team performs an advance analysis of the requirements for ensuring the deliverability of your messages
- Optimizely is a member of the Certified Senders Alliance (CSA)
- Provider relations and Optimizely server allowlisting ensure high delivery rates

© Optimizely 2022

- Mails comply with formatting standards for email headers and HTML
- Automatic steering of the optimal sending speed – ensuring that emails are accepted by providers
- Automatic server switch in case of delivery problems to prevent email loss during sending
- Blocklist monitoring – Optimizely's deliverability team constantly monitor the blocklists of major providers and takes immediate action if an Optimizely IP is accidentally listed there
- 24/7 open and click rate monitoring and provider comparisons for messages

> **Note:** The following features are optional. Contact customer support for more information.

- Progression analysis of open and click rates in your clients to identify and resolve deliverability issues
- SSL certificate for your sending domain
- Multiple sending domains for your use
- Dedicated IP pool for your exclusive use

Security and availability

You benefit from maximum data safety and consistent Optimizely software and service availability.

- ISO 27001 certified by TÜV to guarantee the security of the operation, service, and development of the software
- Hosted in a Tier IV, high-security data center
- Redundant server structure
- Continually updated firewall hardware for blocking hackers
- SSL-encrypted connections
- Split-second main database replication
- Daily data backup
- Automatic application and service availability monitoring
- 24/7 system administrator helpline

© Optimizely 2022

Recipient management

Systematically collecting and analyzing customer data is key to running effective email and omnichannel campaigns. Optimizely Campaign comes with a number of options for processing different data sources and using these to boost your performance.

- Easy-to-use list-based recipient management
- Unlimited number of potential recipients
- Unlimited number of recipient lists
- Manual recipient import using standard CSV
- Automatic duplicate identification during import
- Automatic data validation during import (mandatory fields, correct email addresses and so on)
- Download of duplicates and faulty datasets for reviewing and archiving purposes
- Export complete and filtered recipient lists
- Integrated subscription process based on double opt-in or confirmed opt-in emails
- Tracking opt-out option that enables recipients to disable personal data tracking in accordance with statutory regulations. This does not impact anonymized campaign-specific data tracking.
- Integrated unsubscribe request management in accordance with statutory regulations
- Fully integrated unsubscribe links in mailing templates
- Records subscriptions, opt-ins, and unsubscribe requests with IP and time stamp for your records
- Recipient data enrichment with third-party system data, such as web analytics, CRM, e-commerce, recommendation engines, and other data sources using high-performance automated interfaces
- Recipient history: Entire message history for each recipient in an easy-to-read format, including action data (opens and clicks)

> **Note:** The following features are optional. Contact customer support for more information.

- Automatically import and export recipients using FTP protocol and standard CSV file
- Recipient data encryption

- Subscription form
- Preference Center form
- Delayed subscription confirmation emails
- Separate recipient list data storage available on request
- Development of an individual data management concept by Optimizely consultants

Blocklist

Recipients whose email addresses are on the blocklist are no longer sent any mails. This also applies if these recipients subscribe to emails again later, even if they do so multiple times.

- Client-wide blocklist
- Blocklist inheritable by sub-clients
- Manually add recipients to the blocklist
- Manually import blocked recipients from a CSV
- Search the blocklist for datasets
- Delete datasets from the blocklist
- Use of wildcards to block entire domains or email addresses using key words
- Global blocklist with email addresses that may not be contacted
- Automatic feedback-loop recognition and addition to blocklist
- Automatic external blocklist cross-checks via interfaces or linked databases

Responses and bounce management

Regardless of whether they are hard or soft bounces, or genuine replies, Optimizely Campaign automatically filters and processes responses by category.

- Integrated response management with a display function for viewing responses or responses associated with a specific mailing
- Automatic response analysis using more than 150 filter rules
- Automatic hard bounce, soft bounce, autoresponder, genuine reply/other, suspected spam categorization

- Create special categories using defined rules, for example, returned emails that contain the word order
- On request, responses from selected categories can be forwarded to freely selectable email addresses
- Content display and print function for responses or genuine replies
- Integrated bounce management divided by hard and soft bounces
- Recipients are disabled when reaching the specified bounce limit to protect the reputation of your mailings
- Individually adjustable bounce limits for hard and soft bounces
- Bounce statistics for email and SMS
- On request, you can automatically export bounces using FTP protocol and standard CSV file

System user and permission management

As the administrator of your client, you can create new users and define user permissions down to the smallest detail.

- Easy-to manage user roles
- Assign permissions and user roles for specific periods
- Assign each user permissions for every client
- Assign each user a number of user roles for every client
- User permissions are inheritable by sub-clients
- Assign permissions separately for each marketing channel (email, Push, SMS)
- Password and PIN-protected user logins
- Users can change passwords

Service

Working with Optimizely Campaign means benefiting from the advantages of powerful and intuitive software, and comprehensive customer service and support services.

- Expert customer services delivered by project managers, engineers, and strategy-oriented marketing experts
- Multilingual customer services in German, English and Polish.

© Optimizely 2022

- Helpline team available Mon-Fri, 9 AM - 6 PM CET, by telephone, email and fax
- Free regular webinars
- Manuals, specialist documentation, and best practice guides
- Manuals available offline as PDFs

> **Note:** The following services are optional. Contact customer support for more information.

- Full-service campaign package. On request, Optimizely offers complete project management of your newsletter mailing campaign – from creating to analyzing your campaign
- Customized campaign strategies, designs and analyses with Optimizely consulting
- Knowledge transfer in practice-oriented seminars and workshops

Campaigns

This section shows how to create, edit, or test campaigns and send out mailings through channels: email, text messages and push messages.

- Smart Campaigns. Create, edit, and send one-shot campaigns.
- Omnichannel campaigns. Special notes for Web Push, Mobile Push and SMS.
- Marketing Automation. Automate campaigns.
- Transactional mails. Set up and edit transactional mails.
- Opt-in processes. Create and manage opt-in mailings.
- Message templates. Create and edit message templates.
- A/B test. Set up and execute A/B tests.
- Send time optimization. Deliver your message at the exact moment when recipients open their inbox and read their email.
- Validate mailing prior to dispatch. Information on the automatic parameter test before dispatch.
- Send automatic notification after dispatch. Information on automatic notification after dispatch.
- Mailings Classic. Information about the classic, one-shot campaign. (This feature is deprecated and replaced by functions of Smart Campaigns)

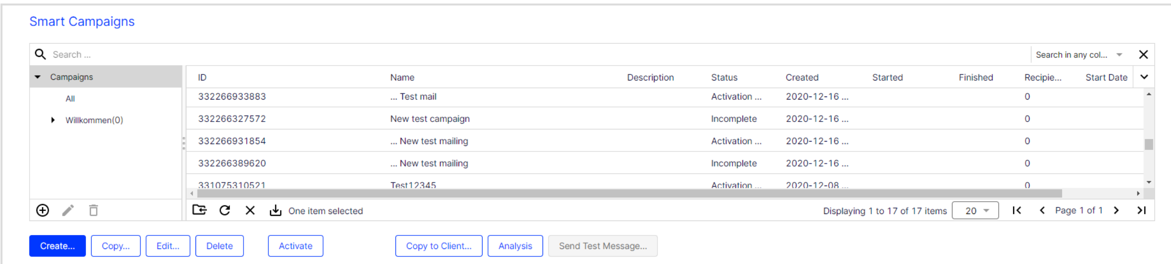
Smart Campaigns

Smart Campaigns is a marketing tool for sending out one-shot-campaigns, such as an event invitation or special Christmas offers. In Smart Campaigns, you can send messages via the following channels: email, SMS, Mobile Push and Web Push.

Use Smart Campaigns to create, start, monitor and evaluate regular campaigns. You create and edit these campaigns on a graphic desktop, and access the elements that make up a campaign (recipients, target groups, A/B test and the message) from the tool list in the left panel.

© Optimizely 2022

To use Smart Campaigns, open the Optimizely Campaign menu and select **Campaigns** > **Smart Campaigns**.



A list of Smart Campaigns appears in the top half of the window. The **Status** column shows whether a campaign was activated or sent.

Because a Smart Campaign's elements and parameters are displayed visually, you can control and optimize it. After you activate a campaign, the Smart Campaigns working area displays feedback on it.

Campaigns and messages

Every Smart Campaign must have at least one message. Both campaigns and messages appear in the Campaign Overview in the **Smart Campaigns** window. A message begins with three dots (**...**) and is located below its campaign. The following conditions and relationships apply:

- A message must belong to a campaign.
- To send a campaign, you must include a message.
- A message's media type (email push or SMS) must match its campaign's marketing channel.
- If your campaign uses the **A/B Test** (split test) node, you must create two versions of the message. See A/B test.

Campaign types

You can select from the following campaign types, each of which is sent via different channels. A Smart Campaign's recipient list must be compatible with its marketing channel.

- **Email.** Sends email to recipient of type **Email** or a multiple list.
- **SMS**. Sends SMS message to recipient of type **SMS** or a multiple list.
- **Mobile Push**. Sends push messages to the Android or iOS device to a recipient of type **Push** or a multiple list.
- **Web Push**. Sends push messages that appear in the recipient's web browser. The recipient list must be a multiple list or of type **Push**.

Campaign status

- **Incomplete**. Elements are missing or necessary parameters are not defined. You cannot activate or start a campaign in this status.
- **Activation required**. Contains necessary elements and parameters. To send campaigns manually, activate the campaign before starting it.
- **Activated**. The campaign is activated and can be started (sent). Campaigns with a specified sending time are sent automatically when activated.
- **Sending**. A campaign 's messages are being sent.
- **Paused**. The sending process is paused manually, or the splits of an A/B test with manual optimization are ended. Click **Start** to restart the campaign or **Cancel** to end it.
- **Canceled**. The campaign is canceled and cannot be restarted.
- **Sent**. The campaign is sent.

Actions

Use the buttons below the campaign overview to perform these actions:

- Create
- Copy
- Edit
- Delete
- Start/Activate
- Copy to client
- Merge content
- Analysis
- Send test message

© Optimizely 2022

> **Note:** Some actions are not available for incomplete or sent campaigns.

Create

Creates a new campaign. See Creating and editing a campaign.

Copy

1. Click a campaign in the list.
2. Click **Copy…**.

Use **Copy** if you regularly send similar campaigns. You can quickly make minor adjustments to values in the copied campaign. Campaign elements (recipients, target groups, messages, and so on) are applied.

> **Note: Limitations**
>
> - Individual messages in the list cannot be copied.
> - Messages are not stand-alone; they belong to a campaign.
> - You can reuse messages by selecting a message in the Selecting the type of content step.

> **Note:** To migrate Mailings Classic mailings to Smart Campaigns, see Mailings Classic.

Edit

To edit a campaign:

1. Click a campaign in the list.
2. Click **Edit…**.

See also Creating and editing a campaign.

© Optimizely 2022

To edit a message:

1. Click a message in the list.
2. Click **Edit...**.

> **Note: Limitations**
>
> - Sent campaigns cannot be edited.
> - Individual messages cannot be copied.
> - Messages belong to a campaign.

Delete

To delete a campaign:

1. Click a campaign in the list.
2. Click **Delete**.

To delete a message:

1. Click the campaign to which the message belongs.
2. Click **Edit...**.
3. Hover over the message node and click .

> **Note: Limitations**
>
> - Sent campaigns cannot be deleted.
> - Individual messages cannot be deleted.
> - Messages belong to a campaign.

Activate/Start

After a campaign is completely defined, its status changes to **Activation required**, and the **Activate** button appears.

Before you can start a campaign, you first need to activate it.

© Optimizely 2022

1. Select the campaign and click **Activate**.

    > **Note:** After you activate a campaign, messages linked to a **Wait** node are automatically started at the specified time.

2. Click **Activate Campaign** in the dialog box. The button changes to **Start**.

    > **Tip:** When activated, the campaign is validated along with parameters (recipients, target groups, message).

3. Click **Start** to begin sending a campaign's messages with the specified parameters (target groups, reductions in sending speed, and so on).

    > - You can activate campaigns only, not messages.
    > - Incomplete campaigns cannot be activated or started.
    > - You can start either a campaign or its associated messages.

> **Tip:** You can automatically send a notification to an email address after a mailing is sent. See Sending automatic notification after dispatch.

A/B tests on activating/starting a campaign

If a campaign includes an A/B test, you will be able to start the splits for this campaign individually.

If you have selected the **Start optimization manually** option in the A/B test, then select all campaign splits after the campaign has been sent, and then click **Optimize** to send the optimized message to the rest of the distribution list.

Copy to client

Copy campaigns to other clients. Recipient lists and target groups are not transferred to the target client.

> **Note: Prerequisites**
>
> - The registered user must have permission to create mailings in the target client.
> - The target clients must have the template used in the campaign that you want to copy.

1. In the campaign overview, select the campaign and click **Copy to Client...**. The **Copy Campaign to Client** window opens.
2. In the **New Campaign Name in the Target Client** field, enter the name for the copy of the campaign in the target client.
3. In the **Target Clients** area, select the client to which you want to copy the campaign.

   > **Tip:** To select all available target clients, check the box in the menu bar.

4. Click **Copy**.

Merge content

Merge mailing content from different campaigns into a new campaign. Recipient lists and target groups are not transferred to the target client.

> **Note: Prerequisites**
>
> - The registered user must have permission to create mailings in the target client.
> - The mailing of the target campaign must have the same content elements as the template you want to merge.

1. In the campaign overview, select the mailing and click **Merge Content...**. The **Merge Content** window opens.
2. In the **New Campaign Name in the Target Client** field, enter the name for the copy of the campaign in the target client.

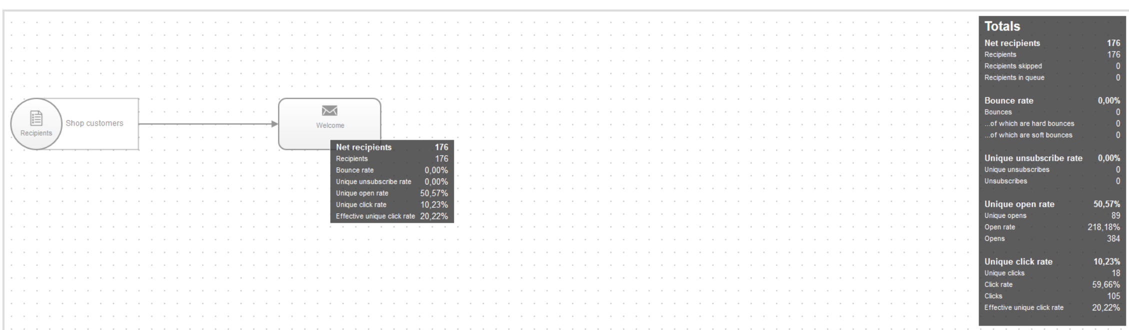
3. In the **Content Elements** area, select one or more content elements from the template you want to merge with the target campaign. The corresponding content elements of the target campaign's mailing will be replaced with these content elements.
4. In the **Target Campaign** area, select the target campaigns with which you want to merge the template's content elements. The new campaign will be created in the client of the target campaign.

   > **Tip:** In the **Target Campaign** area, the last 10 created campaigns per client are displayed. You can select multiple campaigns. To select all available campaigns, check the box in the menu bar.

5. Click **Merge**.

Analysis

1. In the campaign overview, click a campaign then **Analysis**. The **Campaign Analysis** window opens.



   At the top right, a summary of the campaign is displayed. Additionally, the number of recipients is displayed for each individual node.

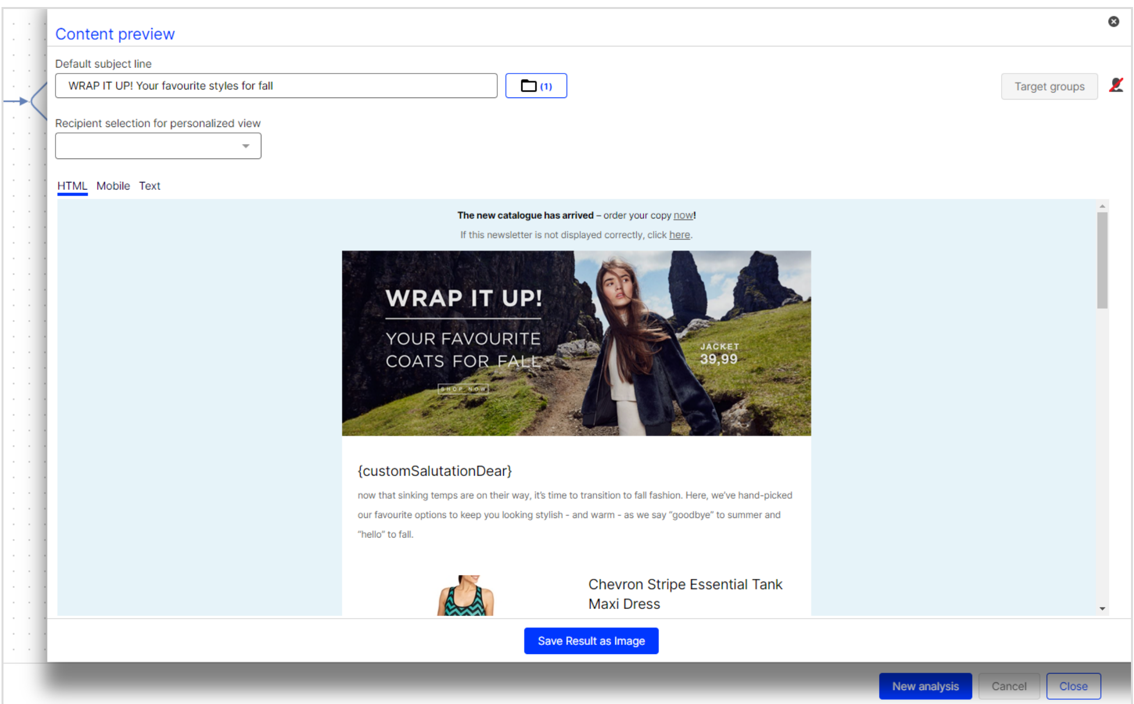
2. To update the analysis, click **New Analysis**.
3. To view the **Send Time Optimization Overview** (additional feature), click the corresponding **Wait** node or **A/B test** node.

Message preview

To preview a message, click the corresponding message node. The content preview opens.

The following options are available in the preview:

- Displays available subject lines.
- **Target Groups**. When active, select one or more target groups and click **Submit Selection** to display only the paragraphs assigned to the selected target groups.
- The buttons only become active when you use a target group in at least one paragraph.
    - Click to show the respective assigned target groups in the individual paragraphs.
    - Click to deactivate the display of assigned target groups.



If you do not want to enable or disable the display of target groups, but rather just the display of a single target group, click the relevant paragraph.

- **Container paragraph**. Paragraphs that contain several sub-paragraphs with their own target groups are marked in the content preview as **container paragraphs**. Container paragraphs are highlighted with a yellow border.

> **Note:** The target groups applied in container paragraphs are automatically carried over to sub-paragraphs included. If you hide target groups in container paragraphs using the button **target groups**, not only is the container paragraph hidden, but also the sub-paragraphs it contains.

> **Note:** Paragraphs that contain several sub-paragraphs without their own target groups are not marked as **container paragraphs** or highlighted in yellow, but instead are displayed with a simple gray banner. However, the target groups for these paragraphs are also carried over to sub-paragraphs.

- **Recipient Selection for Personalized View**. To display a personalized preview with the data of a specific recipient, in the left column, select a recipient list. Then, in the right column, select the recipient.
- **Change View**. The tab bar on the upper left border includes the HTML, mobile and text message previews. In the HTML preview, the mailing appears as it will later appear in the recipients' inboxes. Under the **Mobile** tab, you can view the message as it appears on mobile devices. The **Text** tab displays the automatically-generated text version of the mailing.
- **Save Result as Image** or **Save Result as PDF**. Click to save the message template as an image.

Send test message

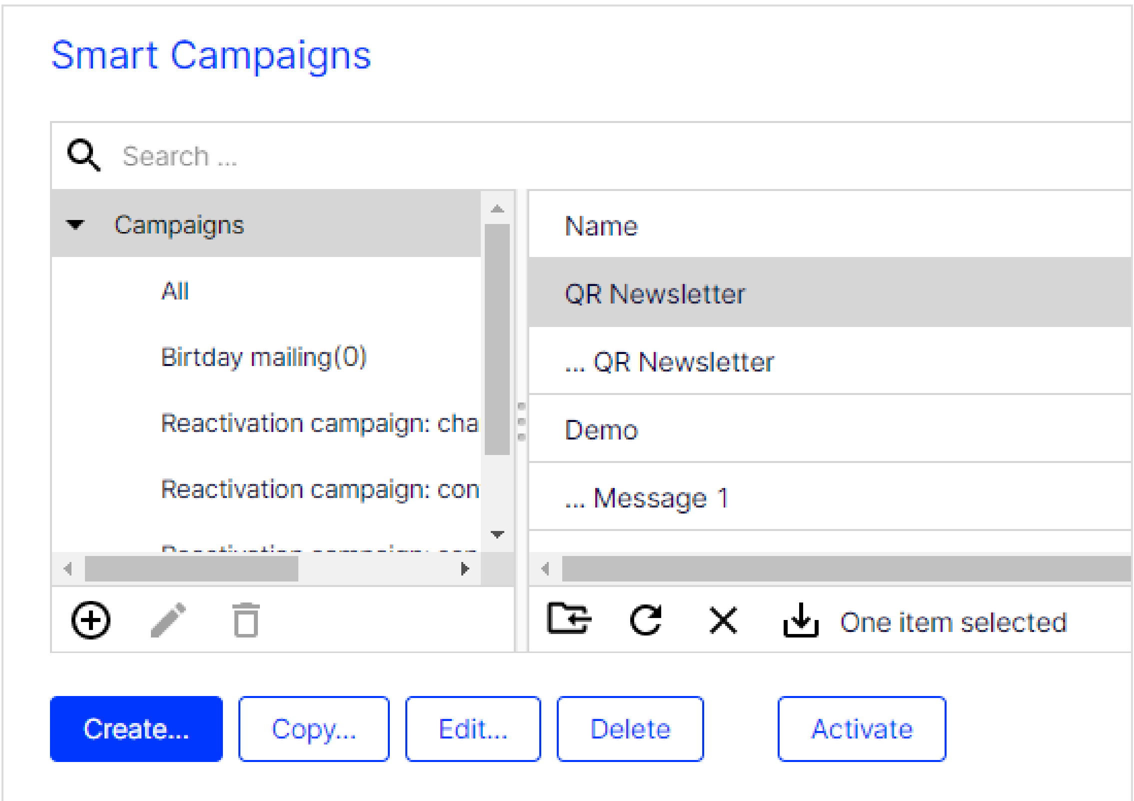
Send a test message to check the appearance of the mailing before the actual dispatch. See **Smart Campaigns nodes**.

Creating and editing campaigns

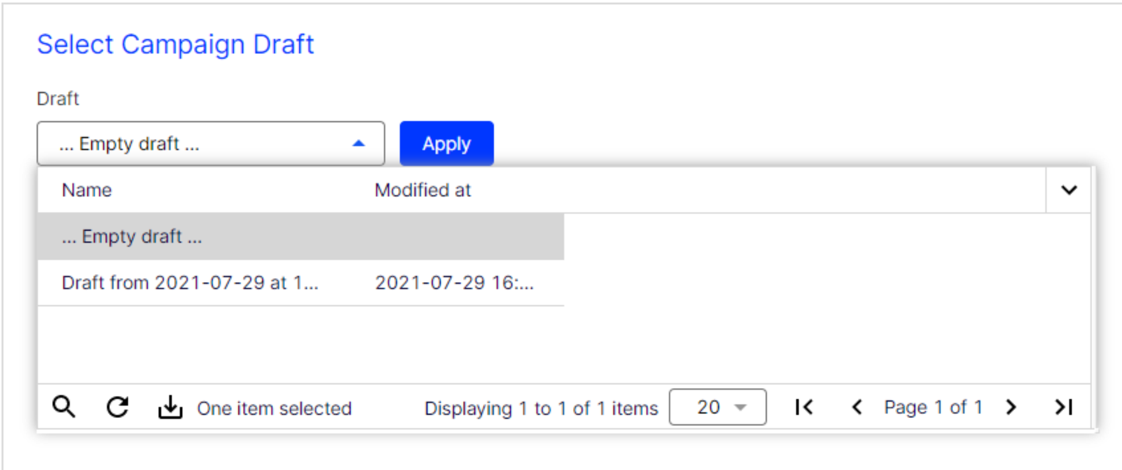
This topic describes how to create and edit a campaign in Smart Campaigns. A campaign consists of campaign elements (nodes) that you configure and connect together. Also learn how to use campaign drafts.

Creating a campaign

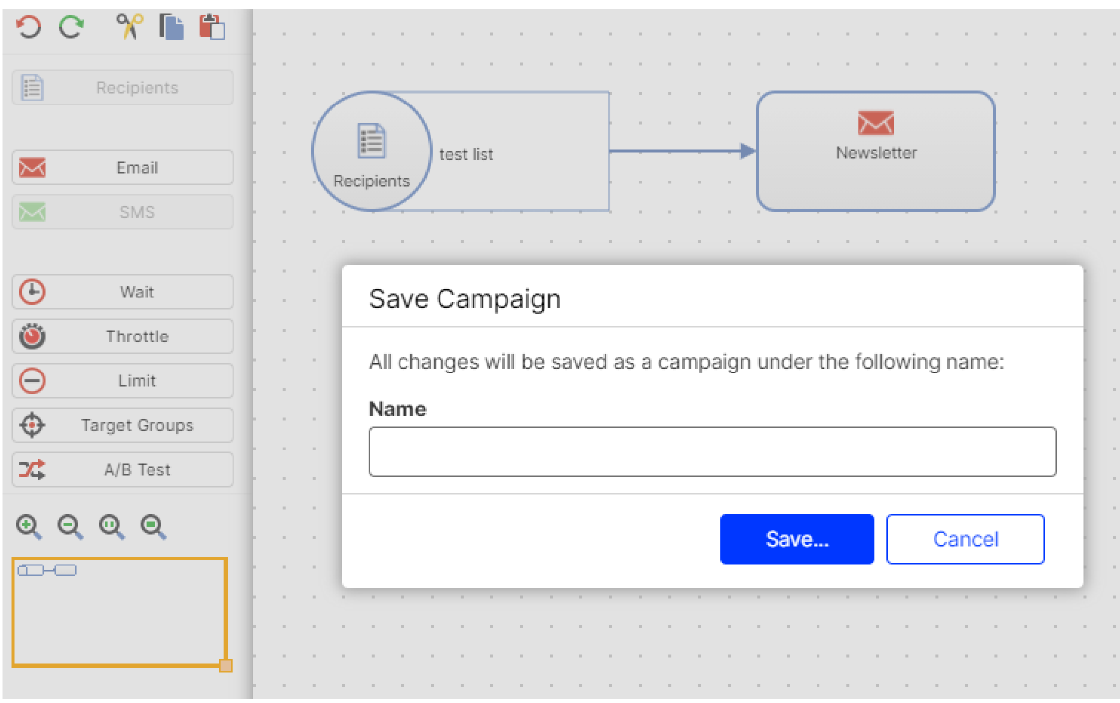
1. Open the Optimizely Campaign menu and select **Campaigns** > **Smart Campaigns**.
2. Click **Create...**.



3. In the **Select a Campaign Draft** window, in the **Draft** drop-down list:
   - To create a new campaign, click **---Empty draft---** then **Apply**.
   - To edit an existing draft, select one from the drop-down list and click **Apply**.



4. Drag the nodes from the left action area to the working area on the right. See **Editing nodes**.
5. Click **Save** or **Save and Close**.
6. In the dialog box, enter a name for the campaign and click **Save**.



If you neglect to insert elements or parameters, a notification appears. To save the campaign anyway and complete the missing details later, click **Force Save**, or **Keep**

Editing and complete the missing details. The new campaign is displayed in the Smart Campaigns overview.

Editing a campaign

To edit an existing campaign, select the required campaign from the list in the **Campaigns** window and click **Edit**. Proceed as described from step 4 in the Creating a campaign section.

Editing nodes

The campaign modules for Smart Campaigns are called nodes, and they appear in the left action area.

Required elements:

- Recipients
- Message (Email, **SMS**, , Web Push or Mobile Push)

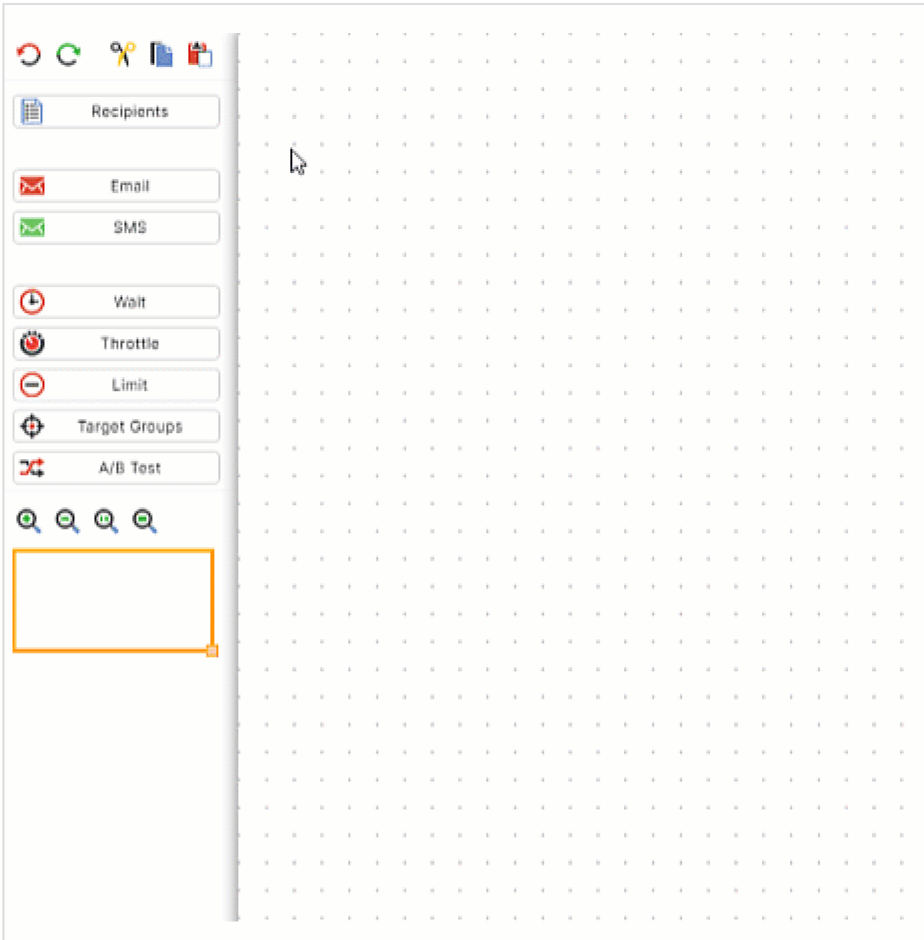
Optional elements:

- Wait
- Block
- **Throttle**
- Limit
- Segment
- Target Groups
- A/B Test

> **Tip:** For details, see Smart Campaign nodes and elements.

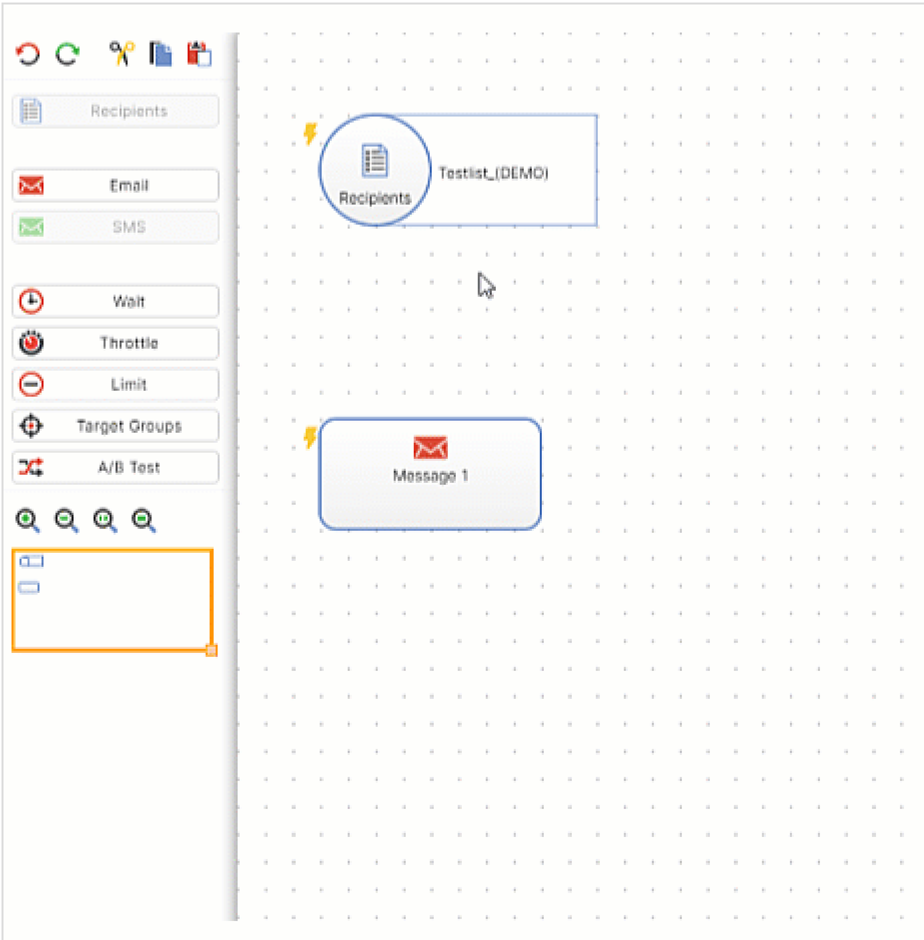
Editing options for nodes and connections include:

- **Insert**. Drag and drop a node to the working area.



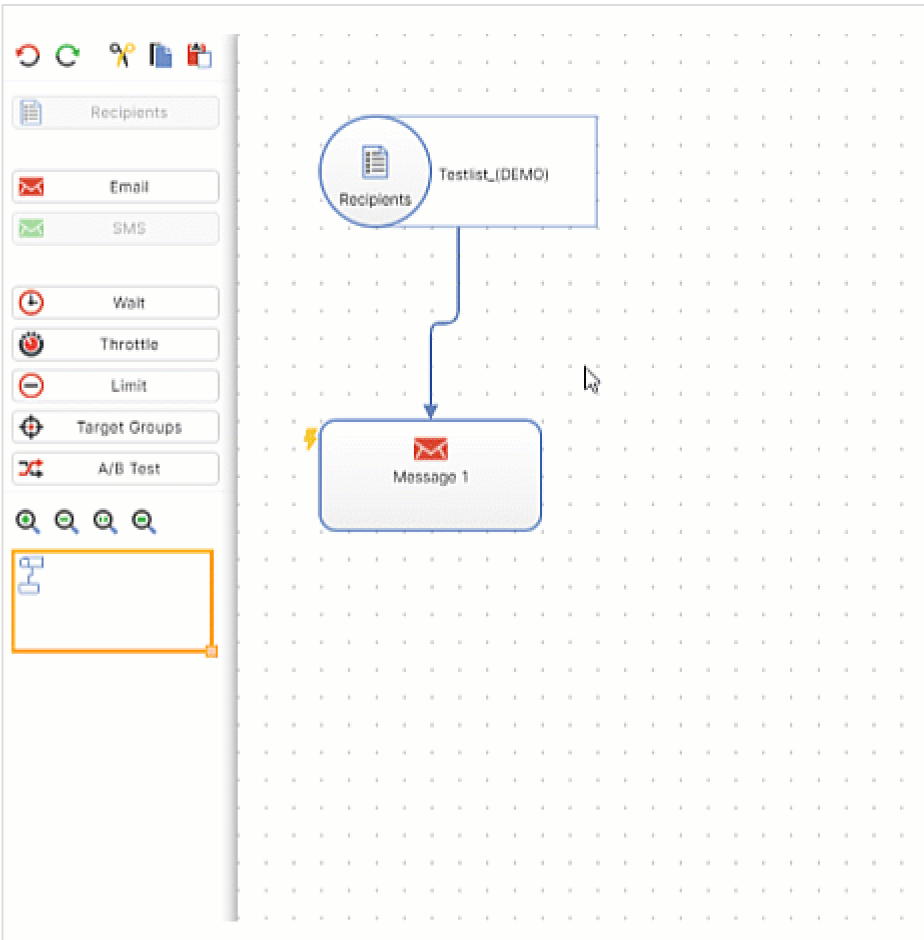
- **Connect**. Click the node and draw a connection to the target node. Each node has connection points at the right, left, upper, and lower side and in the middle.

> **Note:** A campaign node must connect other nodes.



- **Delete**. Hover over the item and click  . Alternatively, select the item and press **[Del]**.

- **Properties**. Hover over the item and click . Alternatively, double click the item.



Editing tools

- **Undo (CTRL + Z)** . Revoke the last action. Every additional click revokes another action.
- **Redo (CTRL + Y)**. Restore previously-revoked action. Every additional click restores another action.
- **Cut (CTRL + X)**. Cut out selected items and temporarily copy them to the clipboard.
- **Copy (CTRL + C)**. Copy selected items to the clipboard.
- **Paste (CTRL + V)**. Insert elements you previously cut out or copied.

Navigating tools

- **Zoom in**. Zoom in the working area. Each click magnifies the working area to the next zoom level.
- **Zoom out**. Zoom out the working area. Each click reduces the working area to the next zoom level.
- **Actual size**. Restore original view.
- **Fit on screen** (Show all). Display all items in the working area.
- **Minimap**. Navigate a campaign by dragging the yellow rectangle in the left action area to the place you want to go to. To zoom in or out of the working area using the minimap, click and drag the bottom right corner of the yellow rectangle either to the left (zoom in) or right (zoom out).

Campaign drafts

When you create or edit a Smart Campaigns, a draft version is saved periodically. If the campaign is closed unintentionally, you can retrieve the latest version. To do that, click **Create** and select the draft from the **Select Campaign Draft** window.

> **Note:** Drafts are saved with the date and time. You can use the timestamp to find even unnamed campaigns that have not been manually saved.

Smart Campaigns nodes

This topic describes required and optional elements in Smart Campaigns. Nodes define those elements and transfer them to the connected node. By connecting nodes in a logical manner, you define the sequence of activities that make up a campaign.

For example, use the **Recipients** node to select one or more recipient lists and transfer their recipients to the message node. When you start the campaign, this message is sent to the transferred recipients.

© Optimizely 2022

Grayed out node

A node may be grayed out for several reasons.

- A campaign already used one media type (marketing channel). For example, if you drag an **Email** node to the desktop, the Print and SMS nodes are deactivated.
- You already used that node type. The **Recipients**, **Limit**, **Target Groups** and **A/B Test** nodes can only be used once per campaign.
- You lack permissions. For example, you have permission to send email campaigns but not SMS campaigns.
- The marketing channel is not configured in your client.

Required elements

A campaign must include a Recipients node and a message node (Email, SMS, Mobile Push, Web Push), before you can start it.

Recipients

Parameter	Description
Recipient Lists	Select one or more recipient lists to which to send the messages. **Note:** The recipient list type must be compatible with the message type being sent. For example, you can only send a print message to a print recipient list (or a multiple recipient list).

Email

Parameter	Description
Name	Enter a name for the message. This name is only used internally.
Description	Enter an optional message description.
Edit Content...	Click to add content, then perform the steps described in Editing message content.
Test Email...	1. Click to start a test dispatch. The **Send Test Message** window opens. 2. In the **Recipient List** drop-down list, select a list with test recipients. 3. If you want to simulate a target group, select a target group in the **Simulate Target Group** drop-down list. **Tip:** The test recipients selected in the next step can also belong to other target groups. 4. In the **Recipients** list, select one or more test recipients. 5. Click **Send Email** to send the test messages in multi-part format, or click **Send HTML Version** or **Send Text Version** if you want to test only one format.

SMS

For more information, see SMS.

Parameter	Description
Name	Enter an internal name for the message.
Description	Enter an optional message description.
Edit Content...	Click to add content, then perform the steps described in Editing message con-

© Optimizely 2022

Parameter	Description
	tent.
Test SMS...	1. Click this button to start a test dispatch. The **Send Test SMS** window opens. 2. In the **Recipient List** drop-down list, select a recipient list with test recipients. 3. In the **Recipients** list, select one or more test recipients. 4. Click **Send SMS** to start the test dispatch.

Mobile Push

For more information, see Mobile Push.

Parameter	Description
Name	Enter an internal name for the message.
Description	Enter an optional message description.
Edit Content...	Click to add content, then perform the steps described in Editing message content.
Test Message...	1. Click this button to start a test dispatch. The **Send Mobile Push Test Message** window opens. 2. In the **Recipient List** drop-down list, select a recipient list with test recipients. 3. In the **Recipients** list, select one or more test recipients. 4. Click **Send Mobile Push Message** to start the test dispatch.

Web Push

For more information, see Web Push.

<table>
<tr><th>Parameter</th><th>Description</th></tr>
<tr><td>Name</td><td>Enter an internal name for the message.</td></tr>
<tr><td>Description</td><td>Enter an optional message description.</td></tr>
<tr><td>Edit Content...</td><td>Click to add content, then perform the steps described in Editing message content.</td></tr>
<tr><td>Test Message...</td><td>Note: You must set up the Web Push test dispatch in advance. See Web Push test dispatch on Optimizely World.

1. Click this button to start a test dispatch. The Send Web Push Test Message window opens.
2. In the Recipient List drop-down list, select a Web Push test recipient list.
3. In the Recipients list, select one or more test recipients.
4. Click Send Web Push Message to start the test dispatch.</td></tr>
</table>

Optional elements

You can include the following elements in a campaign.

- Wait
- Block
- Throttle
- Limit
- Segment
- Target Groups
- A/B Test

© Optimizely 2022

Wait

Specify a message's start time. You can manually activate a campaign containing a **Wait** node. If you do, the messages are sent at the specified time.

Note: Limitations

- **Wait** is **not** available for transactional mails or confirmations.

Tip: Use **Wait** in combination with an A/B test to define the sending time of each split.

Parameter	Description
Wait until...	Specify the date on which a message or split is sent.
at ...	Specify the time when a message or split is sent.
Wait until import has finished	If you are using the closed-loop interface, activate this option to send the messages after the recipient import. **Note:** If you enable this option, do not activate the campaign.
Start at ... after import has been finished	If you are using the closed-loop interface, activate this option to send the messages after the recipient import at the time specified here. **Note:** If you enable this option, do not activate the campaign.

Note: If you use **Send time optimization**, you must also specify a **Wait** option in the **Send date** area as a time reference point. Also, the fallback time is determined for recipients for whom there is not

> enough behavioral data to determine an optimal send time. See Configuring send time optimization in the Wait node.

Parameter	Description
Send time optimization	Select the check box to enable automatic send time optimization.
24 hours/7 days (only when the selected wait option is **Wait until ...**)	Select the period of time during which the send time can be optimized.
Date slider	Use the date slider or the arrow keys to change the start and end times of the send time optimization.

Block

> **Note: Limitations**
>
> - **Block** is **not** available for confirmations.
> - **Block** is **only** available for email.
> - **Block** only works with custom blocklists.

Suspend recipients on custom blocklists from a mailing. Place the **Block** node in your campaign and click **Properties**. Then, select one or more custom blocklists from the drop-down list. The recipients on those blocklists will not get a message.

Throttle

> **Note: Throttle** is **not** available for transactional mails, or confirmations.

Tip: You can also use the **Throttle** node for A/B tests. See A/B Test node.

Specify the dispatch rate. Sometimes you should select a lower dispatch rate, such as when you send a coupon in email. Unless you reduce the dispatch rate, your web shop may get overloaded.

Parameter	Description
Decrease the Dispatch Rate	Specify the dispatch rate per hour for messages. The lowest rate is 1000 messages per hour. If you set 1000 messages per hour, 1000 recipients are distributed evenly throughout the hour.

Limit

Note: Limit is **not** available for transactional mails or confirmations.

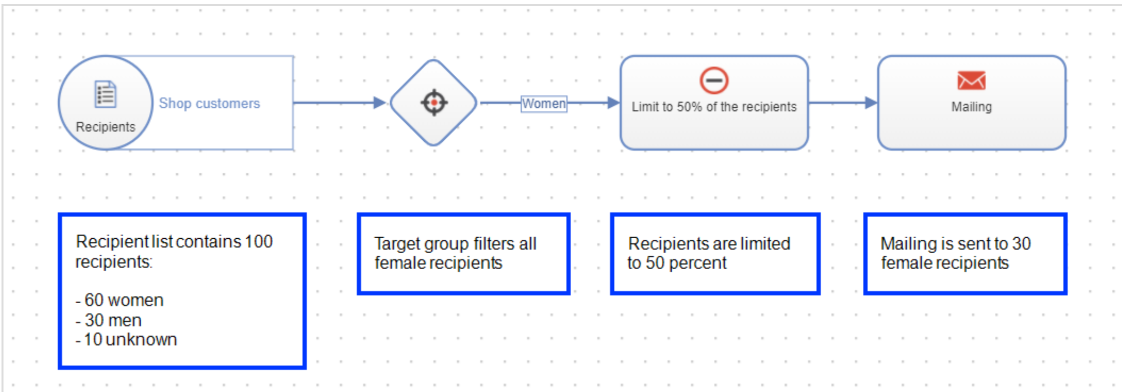
Specify how many recipients (percentage or absolute value) you want to contact. Place the **Limit** node in front of the message node.

Parameter	Description
Percent	Specify the percentage (1 to 100) of recipients to be contacted. The number of recipients is calculated on **the global number of recipients from recipients lists selected in the Recipients node (=100 %)**. Other limiting elements, like target groups, are not considered.
Recipients	Specify the actual number (absolute value) of recipients to be contacted. If this value is higher than the number of possible recipients, all recipients are contacted.

Limit and target groups node

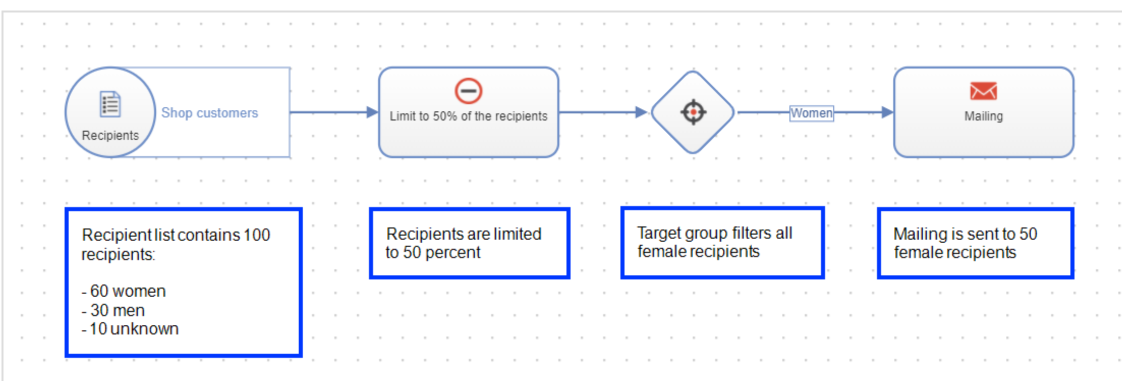
If you use a Limit and Target groups node in a campaign, consider the following notes:

- **Limit node after target groups node**. If you use a **Limit** node after a **Target Groups** node, the limit affects the number of recipients filtered by the target groups node. See the following example:



- **Target groups node after limit node**. If you use a **Target Groups** node after a **Limit** node, unexpected numbers of recipients may occur.

  In the following example, the 100 recipients in the *Shop customers* recipient list are limited to 50 percent. The remaining 50 recipients are then filtered by gender. Since the *Women* target group refers to the initial recipient list, which contains 60 women, the mailing is sent to 50 female recipients.



Segment

Note: Limitations

- This node is **not** available for transactional mails or confirmations.
- To make Optimizely Visitor Intelligence segments available in Optimizely Campaign, you first have to create segments in Optimizely Visitor Intelligence. See Creating a marketing segment.

Use marketing segments from Optimizely Visitor Intelligence as a target group for your campaign.

To add an Optimizely Visitor Intelligence segment to your campaign, drag and drop the **Segment** node onto the desktop. To edit this node, click **Properties** and select the desired segment from the drop-down list.

Target Groups

> **Note: Target Groups** is **not** available for transactional mails or confirmations.

Limit the selection of recipients based on additional criteria (see Target group definition). Place **Target Groups** between the **Recipients** node and the message node.

Target Groups contains no additional parameters. To specify a target group, create an outgoing connection, click it, and define a target group or select an existing one.

Parameter	Description
Target Group	Enter an internal name for the target group and the target group definition. See Target group definition.

A/B Test

Optimize the dispatch of your message. In an A/B test, two variants (A and B) of an email are sent, which differ in a factor (such as the subject line). By comparing key figures (such as the opening rate when testing the subject line), you can determine which variant worked better. See A/B test.

Note: Limitations

- **A/B test** is *not* available for confirmations.
- If you add an A/B test to the campaign, you must create at least two variants of the message. The more successful variant (automatically selected by one of these criteria – **open**, **click**, **bounce** or **unsubscribe rate**, or **revenue**, or manually selected) is sent.

You configure the A/B test in two steps:

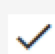
1. Activate automatic optimization in the **A/B Test** node.

Parameter	Description
Activate automatic optimization	Enable to select the most successful message in the splits based on one of the criteria in the following line.
Type of Optimization	Select one. • **Best effective click rate**. Sends message with best ratio of unique openings to unique clicks. • **Best unique click rate**. Sends message that generated the highest percentage of clicks from individual recipients. • **Best unique open rate**. Sends message opened by highest percentage of recipients. • **Lowest unique unsubscribe rate**. Sends message that generated the lowest percentage of unsubscriptions from individual recipients. • **Lowest bounce rate**. Sends message that generated the lowest percentage of return messages. • **Highest turnover**. Sends message that generated the most turnover. **Note:** This option is only available if you are using Post-click tracking, or either web analytics or e-commerce integrations.
Sending Date for the Optimized Message	If you activated the automatic optimization function, select an option to trigger the sending of the optimized message to the rest of the recipients. • **Date and Time**. Send your optimized message at a specified time; for example, you always send messages at 3 PM on Thursdays, and your recipients are used to receiving your messages at this time. • **Delay After Last Split**. Ensure that your recipients have enough time to open a message and to click the links (regardless of when you start the optimization). You can draw conclusions from this for the optimization of your campaign. For example, if your recipients

Parameter	Description
	read a message and click links in the first two days following receipt. • **Manual**. Send the optimized message when you want. Then, once splits are complete, click **Optimize** to start the optimization process in the **Campaigns** window.

2. Create the split mailings and connect them with the **A/B Test** node.

   A/B Test also lets you branch the path of your campaign. For example, to send different messages to different target groups.

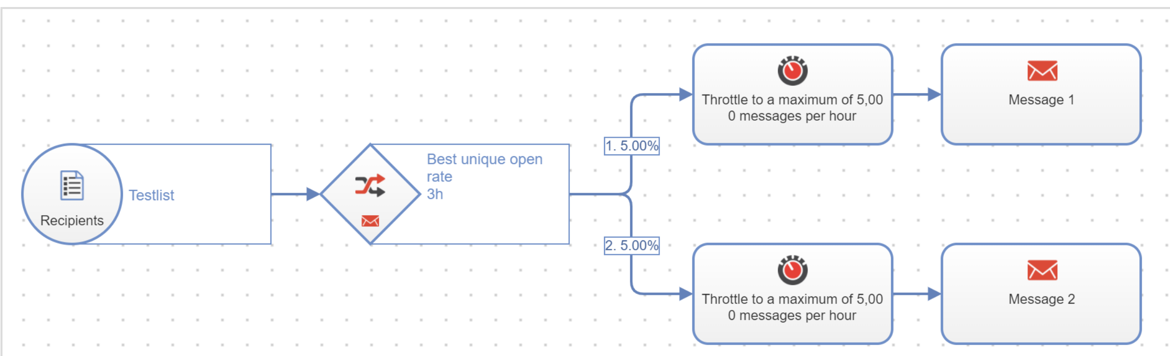
Parameter	Description
Priority	Specify to which target group is to be sent first. The branches are processed hierarchically. The branch with the lowest number has the highest priority and is executed first.
Number of Recipients	Specify the number of recipients to which the connected split is to be sent: • **Percent**. Specify the percentage of recipients to be contacted. • **Recipients**. Specify the number of recipients to be contacted. • **No limit**. Do not limit the number of recipients.
Target Group	Optionally specify which target group is used by referring to an existing target group: a. In the box under **Target Group**, enter a name. b. In the **Target Group** list on the right, select the desired target group. If you create a new target group, define the filters (see Target group definition). c. Click **Save Target Group** . The message is sent only to recipients of the selected target group.

© Optimizely 2022

- If you filter a target group by actions over a period of time and set an A/B test with different send times, unexpected numbers of recipients may occur. Recipients are always calculated at the actual send time of each A/B test message.
- When you use the send time optimization, you must also specify a date and time or select the **Manual** option under **Sending Date of the Optimized Message**. See Configuring send time optimization in the A/B test node.

A/B Test and Throttle node

If you activate automatic optimization for an A/B test and place a Throttle node before the message nodes, the message variant that is sent after the A/B test applies the **Throttle** node setting.



Editing message content

To configure a message and add content, move the cursor to the message you want to edit, click **Properties** > **Edit Content...**. The **Edit Content** window opens, and you can perform the following steps:

1. Selecting the type of content
2. Configuring the message
3. Adjusting layout settings and content

Step 1. Selecting the content type

- Email
- SMS
- Mobile Push
- Web Push

Email

If you edit an email for the first time, select a template:

1. From the Template drop-down list, select one of these options.
   - **New**. Creates a message from a template (for example, the Optimizely Template Kit) or enter your own HTML into the free-text template.
   - **Message**. Applies content from existing message you select from the list. You can select new or sent messages.
   - **Message template**. Send messages regularly with the same sender number (such as "Our offers of the week"). Select the required template from the list. The subject, sender information and attachments are already configured in the message templates. If you select this option, go to Configuring the message. See also Message templates.
2. Click **Next**.

SMS

To edit an SMS message, see Configuring the message.

Mobile Push

To edit a Mobile Push message, see Configuring the message.

Web Push

To edit a Web Push message, see Configuring the message.

© Optimizely 2022

Step 2. Configuring the message

- Email
- SMS
- Mobile Push
- Web Push

Email

See also: Editing mailing content

- **Sender information**
    1. Open the **Edit Content** window.
    2. Click **Sender, Subject, Attachments**.
    3. In the **Sender** area, enter the name and email address that you want mailing recipients to see.
    4. In the **Reply To** area, enter the reply-to name to be displayed in the recipient's email program.

    > **Tip:** You can use field functions to adapt the sender and reply-to address to specific values in the recipient list. Example: You want customers to reply to the branch of your company where they are registered. For more information, see field functions.

- **Subject**
    1. Open the **Edit Content** window.
    2. Click **Sender, Subject, Attachments**.
    3. In the **Subject** area, enter a subject for your message.

    You can use personalizations in the subject line, and send messages to target groups with different subject lines.

    - To create personalized subject lines, click **Insert field function** and select the required recipient list field or the required field function from the list.

- To add a target-group-specific subject line, click **Add Subject...** and enter the text into the new field. Then, select a target group for whom you want to use this subject line. You can add as many additional subject lines and target groups as you like.

> **Tip:** The additional feature *Prefix or suffix subject line* lets you automatically add a prefix or suffix to the subject line of any mailing. See Prefix or suffix subject line.

You can use Unicode characters in the subject line to increase the recipients' attention. Instead of using a plain text subject line, like
NEW! Bikini "Malibu" now in the shop, you can enhance it with Unicode characters:
NEW! Bikini "Malibu" now in the shop 😍👙🌺.

At www.unicode.org you can find a list of Unicode characters that are supported by most web browsers and email clients. Copy the desired symbol from the list and paste it into the subject line. Also set the character set to UTF-8 to display Unicode characters correctly. See Encoding.

> **Note:** Unicode characters are displayed differently by different operating systems (iOS, Android, and so on) and email clients (Gmail, Outlook, and so on) Therefore, always send a test message to check the appearance before sending.

- **Attachments**

1. Open the **Edit Content** window.
2. Click **Sender, Subject, Attachments**.
3. Open the **Attachments** tab.

Select one of the following attachments to messages.

- **Attach a previously-uploaded file**

  a. Click the file that you want to send.
  b. Click **Apply**. You attached the selected file to your message. The name and size of the file are shown below the message's subject.

- **Upload files from your hard drive**

  a. Click **New...**.
  b. Select the option **Upload from hard drive** if not already selected.
  c. In the **Select File** area, click **Browse...**.
  d. Go to the file you want to upload and confirm your selection. The **File Name** field in the **Properties** area shows the file name. You can change the file name.
  e. In the **Properties** area, in the **Description** field, enter a description.
  f. Click **Save**.

  > **Tip:** Optimizely Campaign creates a copy of your file. If you delete the file from your hard drive, the copy remains in Optimizely Campaign.

  g. To attach the uploaded file to your message, select it and click **Apply**.

  The file name and size are appear below the message's subject.

- **Link to an externally stored file**

  a. Click **New...**.
  b. Select the **Use URL** option.
  c. In the **Select File** area, in the **URL** field, enter the URL that refers to the file.
  d. In the **Properties** area, in the **File Name** field, enter the file name.
  e. In the **Properties** area, in the **Description** field, enter a description.
  f. Click **Save**. The file to which you linked is displayed in the **Attachments** area.
  g. To attach the linked file to your message, select the file and click **Apply**.

  The name and size of the externally stored file appears under your message's subject. Optimizely Campaign loads the linked file from the external source shortly before sending and attaching it to your message.

- **Encoding**

  Specify the character set with which you want to encode your mailing. In addition to standard characters (Latin letters, numbers, punctuation characters), the character set also includes special characters (such as German umlauts). Characters that would be displayed incorrectly or not at all on the recipient's computer can be correctly interpreted in this way. To configure the message encoding, follow these steps.

1. At the top right side of the **Edit Content** window, click **More** > **Encoding/Offline HTML**.
2. Select the required character set.
    - **ISO-8859-1**. For recipients in German-speaking regions, Western European countries, and North America.
    - **ISO-8859-2**. For recipients in Central/South-Eastern European countries, for example in Poland, Croatia or Slovakia.
    - **UTF-8**. The UTF-8 format supports most of the special characters found in all languages. Select this encoding if you are contacting recipients in other parts of the world, for example, in Eastern Europe or Turkey.
3. Click **Apply**.

- **Offline HTML**

  This option attaches images and style sheets directly to the email. This option may provide a better representation of your mailing in a recipient's email client, but may also result in a worse deliverability of your email. Also, offline HTML may increase the price because the overall size of every email grows. In addition, open tracking is disabled (clicks are counted as opens anyway).

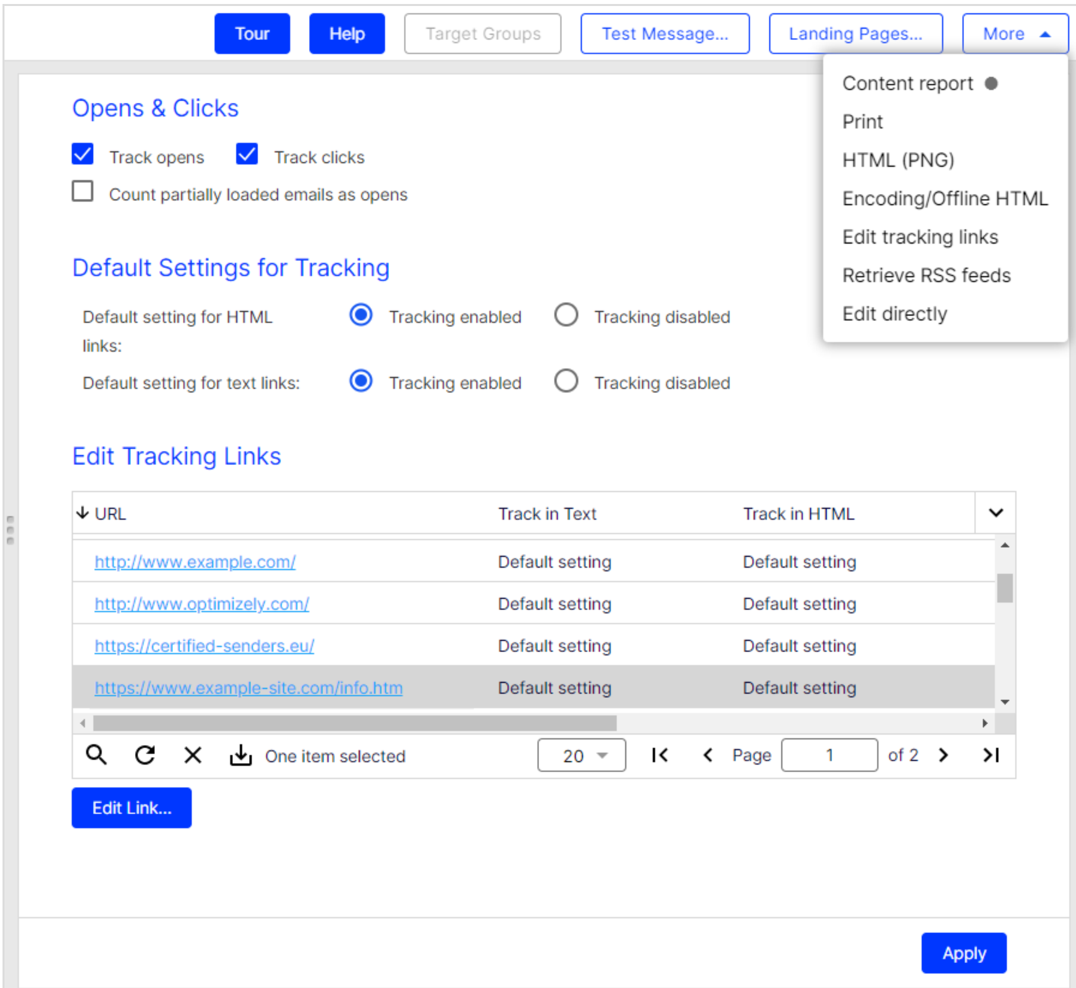
  To activate the offline HTML option, do the following:

  1. At the top right side of the **Edit Content** window, click **More** > **Encoding/Offline HTML**.
  2. Select the check box in the **Offline HTML** section.
  3. Click **Apply**.

- **Tracking**

  Opens and clicks are tracked as standard in both the HTML and text versions of a message. You can apply these settings globally or configure the tracking function for each link in a message. To configure the tracking of openings and clicks, follow these steps.

1. At the top right side of the **Edit Content** window, click **More** > **Edit tracking links**.



2. To globally deactivate the tracking of opens or clicks, clear the **Track opens** or **Track clicks** check boxes.
3. To deactivate the tracking of links for the HTML version or the text version of the message, click **Tracking disabled** next to **Default setting for HTML links** or **Default setting for text links**.
4. To configure tracking for individual links, click the link in the **Edit Tracking Links** list then **Edit Link...**.

5. In the **Track in HTML** column, select one of the following options:
   - **Default setting**. Applies the global settings to this link.
   - **Enabled**. Activates tracking for this link, even if tracking is globally deactivated.
   - **Disabled**. Deactivates tracking for this link, even if tracking is globally activated.
6. Proceed in the same way in the **Track in text** column.
7. Modify the automatically-generated link descriptions in the **Description** column to help decide whether to allocate a link URL to a topic or a landing page.
8. The **Occurrences** column indicates how frequently a link appears in the message.
9. You can enter a click profile for this link in the **Click Profiles** column.

   > **Tip:** You can also assign click profiles automatically in a rule-based manner.

10. Click **Apply**.

> **Note: Using HSTS**
>
> If you use HSTS in your web server (to which the links refer), either disable HSTS in your web browser or create an SSL certificate.
>
> For this, provide the following information:
>
> - **Domain**. The domain (such as, "example.com") for which the certificate needs to be created.
> - **IT contact person**. A contact person from your IT department (First name, last name, company name, address, postal code, phone number, email address, and fax number).
> - **Organizational contact person**. An organizational contact (First name, last name, company name, address, postal code, phone number, email address, and fax number).

- **Administrative email address**. An email address that you use to manage the certificate. An email address that is assigned to your domain is required for this purpose. For example, if you use the domain *newsletter.example.com*, the email address must be either *admin@example.com*, *administrator@example.com*, *hostmaster@example.com*, or *webmaster@example.com*. Only the local parts *admin*, *hostmaster*, *webmaster* or *administrator* may be used.

> **Tip:** The **Anonymize tracking** feature lets you deactivate personalized tracking of opens and clicks for a recipient. If you do, the recipient is no longer included in action-based target groups. See Recipients overview. You can also use the Optimizely Campaign HTTP API to set up the tracking opt-out option in your mailings. See HTTP API on Optimizely World.

- **Import mailing content**

  If you use the free-text template as content type, you can upload a ZIP file with the entire mailing content including HTML and text file as well as graphics. Do the following:

  > **Note:** Specify the relative paths to the linked graphics in the HTML files.

  1. At the top right side of the **Edit Content** window, click **More** > **Import mailing content**.
  2. In the **File** area, click **Browse...** and select a ZIP file in the file browser.
  3. Click **Select Contents**.
  4. In the **Assignments** area, select the respective file from your ZIP file for each content type.

     > **Tip:** If you do not select a file for one or more content types, the content will not be overwritten.

5. Select the encoding for each content type.

> **Tip:** UTF-8 is selected by default.

6. Click **Finish**.

You can edit the uploaded mailing content afterwards.

SMS

See also: SMS

1. If multiple telephone numbers are configured as sender information in your client, in the **Edit Content** window, select a number from the **Sender Number** drop-down list. If just one sender number is configured, you need not select anything here.
2. In the **Limitation of SMS messages** drop-down list, select the maximum number of messages to be sent to ensure that the content is not longer than the selected limit. You receive a warning message if the content exceeds the limit.
3. In the **Content** box, enter the message text.
4. To enter personalized text, click **Insert field function** and select the recipient list field or the required field function from the list.

> **Note:** You can use personalizations to add the name of the recipient to the message (for example "Hello John Doe..."). When using personalized text, the maximum specified message count may be exceeded if the added text (for example, name of recipient) is too long. In this case, the message is sent in full, but charges may be incurred for more SMS messages per recipient than specified in the setting for the message limit.

5. Click **Save**.

Mobile Push

See also: Mobile Push

1. **Title**. Enter the title of the push message. To create a personalized title, click **Insert field functions** and select the required recipient list field or the required field function from the list.

   > **Note:** This title is displayed on Android devices only. iOS devices show the name of your app. Nevertheless, enter a title.

2. **Content** Enter the message text. To enter personalized text, click **Insert field functions** and select the required recipient list field or the required field function from the list.
3. Add an image to be displayed in the push message. You can use the image upload or specify an external image URL.

   > **Note:** To display images on Apple devices, you must integrate the iOS SDK. See Mobile Push iOS integration on Optimizely World.

   - **Image Upload**. Upload an image using drag and drop or file upload.

     > **Note:** The following formats are supported: .jpg, .png and .gif. Maximum file size is 1 MB.

   - **External Image URL**. Enter the URL that points to the image file.
4. **Deep Link**. Define what should happen after the message is opened, such as landing pages to be opened in your app. Combine several actions such as opening a page along with playing a specific sound stored in your app by clicking **+** to add information. To insert personalized deep links, click **Insert field functions** and select the required field function from the list.

   > **Note: Reserved deep links and prefixes**
   >
   > Do not use the following reserved deep links:
   >
   > - from
   > - dry_run
   > - restricted_package_name
   > - delivery_receipt_requested

- delay_while_idle
- content_available
- message_id
- notification_key
- registration_ids

Also, do not use the following prefixes in deep links:

- google
- gcm

5. **Expiry Date**. Define the validity of the message (for example, to promote time-limited special offers) .
   - **On**. Specify the last date to deliver the message to the recipient's device. After this date, the message is not delivered. For example, if you define 2022-03-12 but the recipient activates his/her end device on 2022-03-13, the message is not displayed on the recipient's device.
   - **Non-expiring**. Select this option to deliver this message for an unlimited period.

   > **Note:** On Android devices, the maximum validity period is four weeks.

6. **Preview**. Switch between **Android** and **iOS** and **Banner** and **Lockscreen** to display a preview of your message on the respective device.
7. Click **Save**.

Web Push

See also: Web Push

1. **Title**. Enter the title of the push message. To create a personalized title, click **Insert field functions** and select the required recipient list field or the required field function from the list.
2. **Content**. Enter the message text. To enter personalized text, click **Insert field functions** and select the required recipient list field or the required field function from the list.

3. Add an icon to be displayed in the push message. You can use the icon upload or specify an external icon URL.

   > **Tip:** If you do not add an icon, the default icon of the respective web browser is displayed.

   - **Icon Upload**. Upload an image in PNG format and with the maximum dimensions 512x512 pixels using drag and drop or file upload. The maximum file size is 1 MB.
   - **External Icon URL**. Enter the URL that points to the image file.
4. Add an image to be displayed in the push message. You can use the image upload or specify an external image URL.

   > **Note:** Mozilla Firefox does not support images in Web Push messages.

   - **Image Upload**. Upload an image using drag and drop or file upload.

     > **Note:** The following formats are supported: .jpg, .png and .gif. Maximum file size is 1 MB.

   - **External Image URL**. Enter the URL that points to the image file.
5. **Landing Page URL**. Specify the website the recipient goes to by clicking the push message.
6. **Payload**. Specify what additional information (such as tracking parameters) is transmitted when the recipient clicks the push message. To add more information, click **+**. To personalize the payload, click **Insert field functions** and select the required field function from the list.
7. **Expiry Date**. Define the validity of the message (for example, to promote time-limited special offers).
   - **On**. Specify the last date to deliver the message to the recipient's device. After this date, the message is not delivered. For example, if you define 2022-03-12 but the recipient activates his/her end device on 2022-03-13, the message is not displayed on the recipient's device.
   - **Non-expiring**. Select this option to deliver this message for an unlimited period.
8. Click **Save**.

Step 3. Adjusting layout settings and content

Depending on the selected message type, you can adjust the layout and add content elements.

Message type	Description
E-Mail	See Edit mailing content. If you are using the Template Kit, see Template Kit.
SMS	In SMS messages, you can only send text-only messages. Enter the text in the **Content** box. See SMS.
Mobile Push	With Mobile Push, you can send messages to mobile devices and trigger predefined actions. Enter the text in the **Content** box and optionally upload an image. See Mobile Push.
Web Push	With Web Push, you can send text messages that appear in the recipient's web browser. Enter the text in the **Content** box, and optionally upload an image and an icon. See Web Push.

Omnichannel campaigns

This section contains special notes for the following channels:

- SMS
- Mobile Push
- Web Push

Mobile Push

A Mobile Push message is delivered from a software application to a mobile device, and appears on the device without a specific request from the recipient. Use Mobile Push, for example, to inform your customers about the current shipping status and delivery time of an ordered product. Or send appointment reminders.

© Optimizely 2022

- Automated dispatch through Smart Campaigns and Marketing Automation.
- Customize Mobile Push messages by setting time limits and fields for individual target links. See Configuring a Mobile Push message.
- Add an image and personalize the Mobile Push message by using field functions.
- Integrated preview function.
- Optimizely Campaign integrations for Mobile Push are available for Android and iOS operating systems.

For information on setting up Mobile Push, see Optimizely World.

Web Push

A Web Push message appears in the recipient's web browser without a specific request. With Optimizely Campaign, you can make Web Push messages part of your campaign.

For example, use Web Push together with to send your web shop customers a reminder when items are in the shopping cart but the order has not been completed. Or send personalized product recommendations created with .

- Automated dispatch through Smart Campaigns and Marketing Automation.
- Customize Web Push messages by setting time limits and fields for individual target links. See Configuring a push message.
- Add an image and personalize the Web Push message by using field functions.
- Integrated preview function.

For information on setting up Web Push, see Optimizely World.

SMS

With SMS, you can use mobile marketing, for example to reach new target groups or to reach your customers prominently on mobile devices. For interactive direct communication with customers, use it to receive incoming SMS. Optimizely's portfolio includes generation of short codes and standard numbers for two-way, mobile customer communication.

In most countries where this is possible, Optimizely SMS uses direct routes to network operators and offers exceptional quality, speed, and availability. Thus, Optimizely SMS is suited to the delivery of transactional and commercial messages.

A personalized message is possible at all times. For effective international SMS communication, Optimizely supports relative character sets and data formats, which support country-specific characters.

For example, use SMS to send:

- appointments
- PINs
- billing, delivery or order information
- personal and customized special offers

> **Note:** The sending of SMS messages requires a special opt-in.

Text length and number of characters

SMS messages are pure text messages. The maximum number of characters per message depends on the coding and special characters. Modern mobile phones can receive SMS messages which are too long (concatenated SMS) with no problem, and display these as a single message.

GSM character set

The GSM 7-Bit default alphabet was developed for sending and receiving SMS via the cellular mobile network. This standard contains a simple character set for sending SMS messages of up to 160 characters. The following characters are available:

```
"#$%&'()*+,-
,-./0123456789:;<=>?@ABCDEFGHIJKLMNOPQRSTUVWXYZabcdefghijklmnopqrstuvwxyz_
¡£¤¥§¿ÄÅÆÇÉÑÖØÜßàäåæèéìñòöøùü
```

...plus the following non-visible characters:

- space
- new-line
- carriage return

The GSM standard character set includes an extension. Each character in the extension requires **two characters**:

```
^[]{}\|€~
```

UCS2 character set

The sending of SMS via Optimizely Campaign also supports the UCS2 character set. This set covers most modern languages, as defined in International Standard ISO/IEC 10646. See Universal Coded Character Set.

> **Note:** When UCS2 is used, an SMS message cannot exceed 70 characters because each character requires 16-bits; more than double the storage required by a character in the GSM 7-bit default alphabet.

Determining which character set is used

The characters in an SMS message determine if it is GSM-coded (7-bit) or UCS-coded (16-bit). Each SMS can have only one encoding, which is performed automatically. If an SMS uses one 16-bit encoded character, the entire message is 16-bit encoded, even if other characters can be encoded using 7-bit.

Country-specific features

The sending of SMS, subject to country-specific regulations, primarily includes these functions:

- Sender identifier
- Sending length (multi-part) SMS
- Supported character sets

Moreover, as the customer, you are likewise subject to restrictions which vary by country. For example, you must comply with country-specific regulations on consent to advertising, privacy and competition regulations.

Note: Limitations

- Optimizely does not support the delivery of binary content, such as ring-tones or images.
- Optimizely does not support certain mechanisms in language tables for Portuguese, Turkish, Bengali and Hindi, the locking-shift or single-shift tables in GSM standard.
- Not every character is available in every country.
- In some countries, the characters used are restricted by law or network operators. Moreover, especially among discount telephone operators, the characters in an SMS may not be delivered correctly. This can lead to display errors.

Multipart SMS (concatenated SMS)

You can send a message with more than 160 or 70 characters (depending on character set), but the text is sent as multiple, individual SMS messages. Modern devices may display these SMS messages as a single SMS. The previous procedure corresponds to the GSM protocol **Concatenated SMS**. For longer texts, several individual SMS messages are used and counted for billing purposes.

The maximum number of characters per SMS is reduced for concatenated SMS messages. Thus, only 153 or 67 characters (respectively) per SMS are available. The maximum lengths appear in the following table:

SMS encoding	max characters per 1 message	max characters per 2 messages	max characters per 3 messages	max characters per 4 messages	each additional
GSM 7-bit (default alphabet)	160	306	459	612	each plus 153 characters
UCS2	70	134	201	268	each plus 67 characters

© Optimizely 2022

Note: Recommended maximum number of characters

Do not send more than 10 SMS messages 1,530 characters) for a **Concatenated SMS**. If you send more than 10 SMS, or 1,530 characters, a multiple part message may not be sent or received correctly.

Note: Field functions and placeholders in SMS

If you use field functions and placeholders in an SMS message, the text length of the SMS sent cannot be calculated in advance. If placeholder text is replaced by personalized content (for example, the recipient name), SMS messages may become multi-part messages and incur higher costs. So, before sending, check how many characters are included in your datasets and how long an SMS can be. You can also read the example in the Personalizations section.

Checking costs

Billing is calculated per SMS sent. For example, for a two-part SMS mailing, two text messages (SMS) are billed per recipient.

For a cost overview, Optimizely Campaign lets you enter the number of SMS messages – and thus the maximum number of characters – you want to send. If the text is too long for the selected setting (for example, 160 characters (1 part)), an error message is displayed.

Sender identification

SMS is implemented based on phone provider. In addition to telephone numbers, you can use up to 11 alphanumeric character strings as sender identification. with Optimizely SMS, you can use the following sender identification formats:

- **Alphanumeric sender identification**. String of letter and number characters. The sender identification must begin with a letter. Avoid the use of umlauts and special characters. Alphanumeric sender identifications can only be used to send (not receive) SMS.

- **Exclusive short codes**. Short sequences of numbers, for example 23232, for direct two-way customer communication. See German Federal Telecommunication Network Agency (Bundesnetzagentur) for the short code format for Germany. You can use exclusive short codes only within the country where they were assigned. International routing is not possible.
- **Non-exclusive short code**. A short code is simultaneously used by multiple service providers. You may provide keywords for response capability. You receive only forwarded messages that contain the keyword you provided.
- **Long code**. A long code is a customary mobile number that you can route internationally. For example, +4915112345678. The advantages of a standard number are cost and international usability.

Personalizing messages

You can insert placeholders for recipient list fields (such as "Hello {first name}!") or field functions (for example, salutation logic) into SMS messages. Upon delivery, these are replaced by the corresponding name (such as *Hello Andrea!*) or salutation format (*Dear Mr. Miller*).

If you use placeholders or field functions, the display of used/remaining characters cannot provide precise results. This is because Optimizely Campaign can only determine message length after the placeholder or field function is replaced by the individual value, which occurs directly after sending. So, a message intended to be sent as a single SMS might be divided into two messages, which results in higher delivery charges.

Example

The following message contains a placeholder for the recipient 's first name and has 163 characters:

```
Hello {firstname}! Have you checked out our current holiday deals
at www.example.com yet? They are only available today (before
midnight) in our web shop. Act fast!
```

When sending, the placeholder is replaced with the recipient’s name, and could look like this:

1) *Hello Max! Take a look at our current holiday deals at www.example.com! Only available today (before midnight) in our web shop. Act fast!*

2)*Hello Maximilian! Take a look at our current holiday deals at www.example.com! Only available today (before midnight) in our web shop. Act fast!*

In the first example, the sent message has 145 characters and is sent as a single SMS. In the second example, the message has 162 characters and is divided into two SMS messages, so two SMS messages are billed.

Analyzing bounces

You can analyze bounces from SMS recipients. A bounce is generated when:

- the mobile phone is switched off or unreachable during dispatch
- the mobile phone's inbox is full
- the number is invalid or no longer in use

Blocking numbers with a blocklist

If you want to send SMS mailings via your client, the client's blocklist is adjusted accordingly. You can block complete numbers or specific parts of numbers (such as area codes). You should block satellite phone numbers, because the cost for such a message is substantially more expensive (more than 1 euro per SMS).

SMS processes

SMS processes enable your customers to request or stop a service by sending an SMS with a predefined keyword. For example, your customers can send an SMS with the keyword *Help* to request help or *Stop* to unsubscribe from promotional SMS. For more information, see SMS processes.

SMS processes

SMS processes enable your customers to request or stop a service by sending an SMS with a predefined keyword. For example, your customers can send an SMS with the keyword *Help* to request help or *Stop* to unsubscribe from promotional SMS.

Prerequisites

To use SMS processes, you need one or more inbound numbers. Inbound numbers are telephone numbers or short codes that forward incoming messages to a target system. To set up an inbound number at a telephone provider and configure it for your clients, contact customer support.

You can choose from up to three types of inbound numbers depending on the country you are in:

- **Long code**. A customary mobile number, for example *+4915112348765*.
- **Exclusive short codes**. A short sequence of numbers, for example *11221* .
- **Non-exclusive short code**. A short code that you can use for several clients (shared code). The telephone provider assigns several provider keywords to a short code, for example *11221 / kids* and *11221 / baby*. Depending on the provider keyword, SMS are delivered to different Optimizely Campaign clients.

  > **Note:** For non-exclusive short codes, senders must enter in the SMS both the provider keyword and the service keyword , such as *baby stop*.

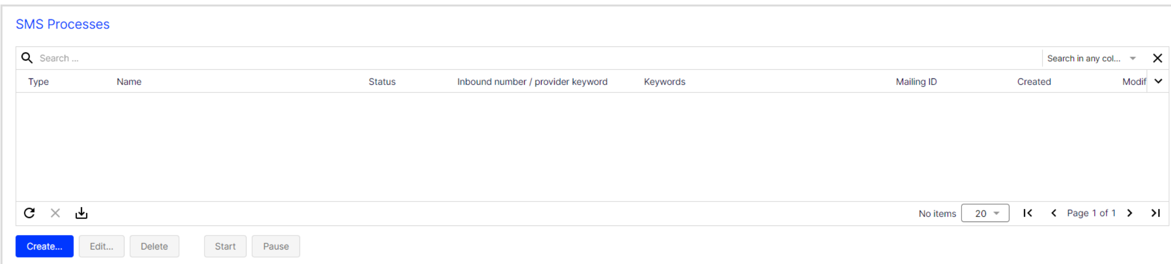
For further information about the different code types, see the chapter SMS under Sender identification.

> **Note:** Depending on the type of inbound number selected, the costs for setup and operation by the telephone provider vary.

> **Tip:** In some countries you have to purchase inbound numbers yourself. If you are a resident of the USA, you can obtain inbound numbers from the website https://usshortcodes.com/.

SMS process overview

To open the SMS process overview, open the Optimizely Campaign menu and select **Administration** > **SMS Processes**.



In the SMS process overview, you can find information about all created SMS processes, such as process type, name and mailing ID. You can also view the current status of each SMS process:

- **New**. A new process that has not yet been started.
- **Started**. The process has been started and is running.

  > **Note:** If you edit a started process and click **Save and Close**, your changes are immediately applied to the running process.

- **Paused**. The process was paused and is not running.

SMS process actions

> **Note:** Some actions are not available for new or incomplete SMS processes.

- **Create...**. Create new SMS processes. See Creating SMS processes.
- **Edit...**. Edit an SMS process as described under Creating SMS processes.
- **Delete**. Delete an SMS process to permanently remove it.
- **Start**. Start an SMS process. The process changes its status to **Started** and is running. Inbound SMS from your customers can then be covered by the SMS process.

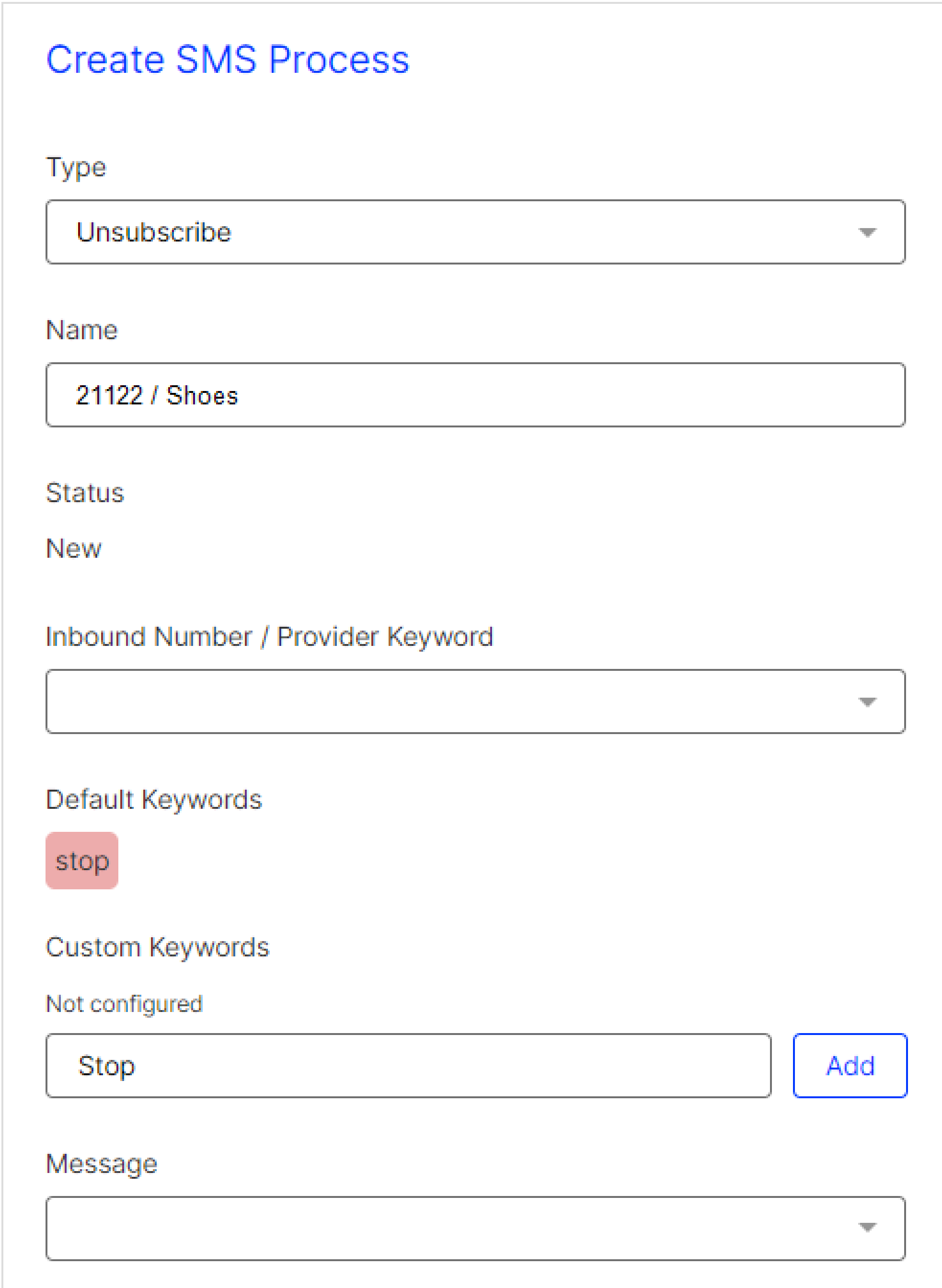
- **Pause**. Pause an SMS process. Your customers' inbound SMS messages are then no longer covered by the process. You can restart paused SMS processes at any time.

© Optimizely 2022

Creating SMS processes

© Optimizely 2022

1. Click **Create...** in the SMS process overview. The **Create SMS Process** window opens.



2. Select one of the following process types from the **Type** drop-down list:
   - **Unsubscribe**. The sender is added to the internal unsubscribe list for the SMS channel and no longer receives advertising SMS.
   - **Help**. The sender receives the message that you select under **Message**.

   > **Note:** You can only create one unsubscribe and one help SMS process for each inbound number / provider keyword. This is to ensure a distinct assignment for every SMS process.

3. Enter an internal name for the SMS process under **Name**.
4. Select an inbound number from the **Inbound Number / Provider Keyword** drop-down list. If you use a non-exclusive inbound number, the keyword assigned by the provider will also be displayed (such as *11221 / Shoes*).
5. Optional: Under **Custom Keywords**, enter a keyword that is to be added to the pre-defined default keywords. Click the **Add** button to add the new keyword.

   > **Note:** Custom keywords must not contain numbers, special characters or spaces.

6. Under **Message**, select the message to be sent automatically to the sender of the inbound SMS. To do this, create a transaction mail of type SMS. See Transactional Mails.

   > **Note:** The sending of a message is mandatory for SMS processes of type *Help*, optional for processes of type *Unsubscribe*.

   > **Warning:** Depending on the country of the recipient, sending a confirmation SMS after successful unsubscription is either mandatory, optional or even prohibited. Before starting an unsubscribe process, inform yourself about the respective country regulations and separate SMS processes according to the destination country.

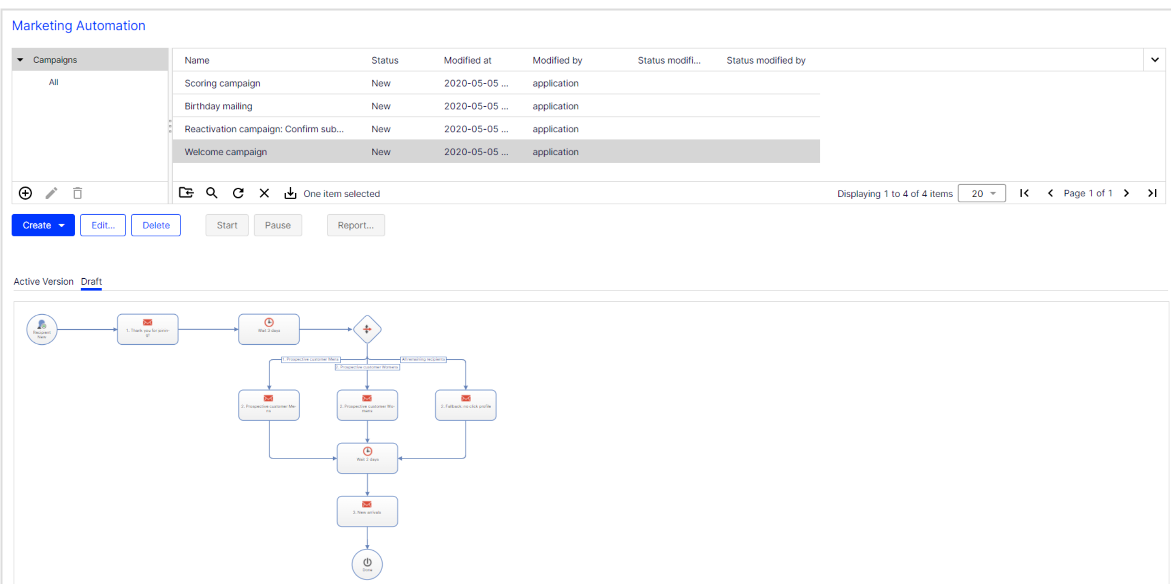
7. Click **Save and Close**.

Marketing Automation

Develop multi-step campaigns with action- and event-based mailings; perfectly adapted to a highly diverse set of target groups using fully automated distribution cycles. You can create campaigns based on your customer database, then refine them once the campaign is up and running. You have access to the entire platform, so you can concentrate on the ad message design.

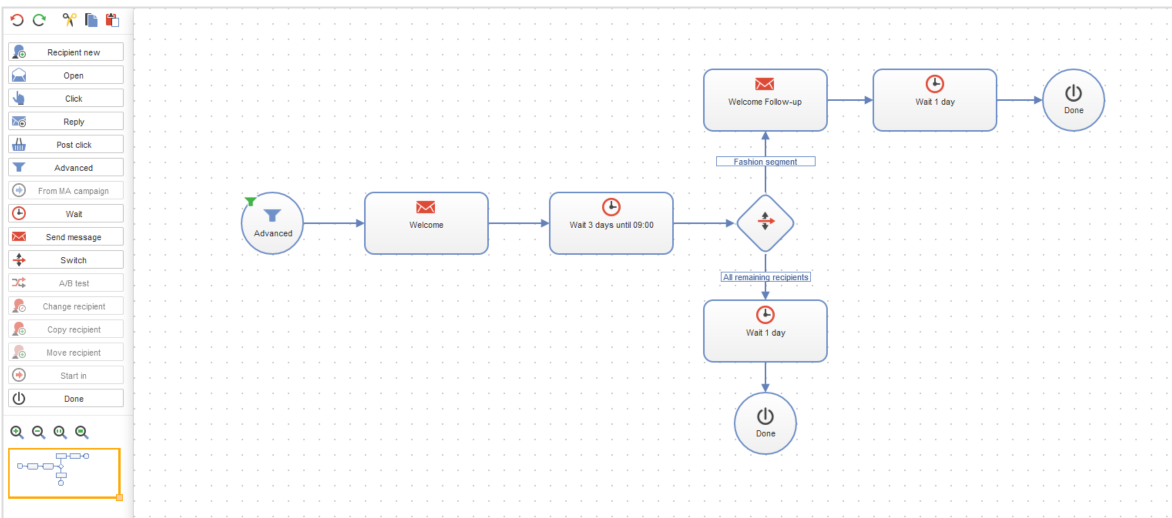
- Lifecycle marketing made easy via drag and drop.
- Sustainable, automated cultivation of customer relations.
- Effective dialog marketing through customized triggered emails.
- Higher revenues through automated cross and upselling campaigns.

To create and manage Marketing Automation campaigns, open the Optimizely Campaign menu and select **Campaigns** > **Marketing Automation**.



Marketing Automation campaigns for a better customer engagement

Using Optimizely's Marketing Automation, it’s easy to analyze potential customers, promotions, and your customer contact histories then incorporate that information into your campaigns. Optimize your customer dialog through a process that lets you improve and refine your marketing strategy. Information gathered during a campaign can be used to augment an existing database. This, in turn, lets you more accurately define segments then roll out more finely-tuned campaigns.



Campaign examples

- **Welcome mailings**. Welcome new subscribers through targeted welcome mailings. These are based on a multi-stage campaign aimed to introduce potential purchasers to your brand and what it has to offer. First impressions are very important in campaigns of this kind. It’s an ideal phase for introducing your line of products and opening a dialog. Ask new subscriber to complete their data and to enter their interests and preferences. In this way, you know early on whether an addressee would be interested in special promotional offers. And the Preference Center (profile self-administration) lets you inquire whether the subscriber prefers to be contacted on a weekly or monthly basis. Under certain circumstances, it may be worthwhile to include a sweepstakes mailing as part of the series of welcome mailings – to turn an interested consumer into a new customer.

- **Trigger and transactional mails**. Trigger mails help nurture existing customer relationships, ensure consistent sales, and initiate new customer relationships. Distribution is triggered by a special event relating to the subscriber – with Optimizely Campaign automatically sending out trigger mails according to predefined criteria or at a specified point-in-time. In campaigns created with Marketing Automation, each node through which mailings are sent is a trigger mail. This provides a simple tool for automatically contacting customers individually under a variety of scenarios. Transactional mails, on the other hand, are emails sent out subsequent to an order, a purchase, or similar customer action (transactions). See also Triggers in the Triggers User Guide.

  If you use post-click tracking, you can use Optimizely's Marketing Automation to send transactional mails. See also Post-click tracking.

- **Cross and upselling offers**. Product recommendations offer enormous potential. These mailings are prompted by a purchase, a registration or similar action, with contents automatically adapted accordingly. The goal is to encourage follow-up purchases, the purchase of higher-quality and higher-priced goods, or a wider variety of purchasing choices. Cross- and upselling recommendations are made available through a database and content interface or via established web-analysis software in Optimizely Campaign.
- **Customer care**. Establish an ongoing dialog with regular customers through a proactive approach to customer care that goes beyond regular communications. You can measure customer satisfaction, for instance, by means of statistical analyses based on scorings. Ideally, this lets you predict the likelihood of cancellation on a case-by-case basis. Specially incentivised customer-binding mails are sent when certain tolerance limits are exceeded. Concurrently, you can also include targeted customer satisfaction surveys that solicit suggestions on how to improve your services.

  Also, be sure to closely track changes to customer status. If a customer has a change of address, for example, you can send a mailing with information and promotions tailored to the new location. If you know your customer's age, select mailings with content appropriate to his or her age-bracket. React to the first signs of inactivity by inquiring whether the customer elects to suspend mailings for a time or prefers receiving them less frequently. Contact Optimizely with any requests.

- **Reactivation**. Reactivation by email is an important component of effective lifecycle marketing. Successful reactivation depends on the effective monitoring of subscribers. Early detection of sagging interest or excessive contact frequency helps to avoid customer inactivity and, ultimately, customer withdrawal.

First, define at what point a customer is to be considered inactive. Set a timeframe to indicate when a customer fails to open or click your emails to determine his or her status. Possible indicators include not only failure to open or click mails but also a failure to log in to user accounts and communities, or user data not being updated. The timeframe you employ depends on the natural lifespan of your products, services and promotions. Successful re-activations are normally the result of multi-stage campaigns. For example, you may want to request that the addressee update his or her customer information. Those who click the link receive a shopping coupon. And you can incentivise addressees who did not respond your first email by sending a second one.

> **Tip: Marketing Automation guide**
>
> See helpful information, tips, tricks, and examples for successful Marketing Automation campaigns in Marketing Automation guide.

Marketing Automation packages (only DACH)

> **Note:** The various Marketing Automation packages are only available for customers in the DACH region. For non-DACH customers, all services of the **Ultimate package** are available.

Optimizely's Marketing Automation contains three packages. If a node is grayed out (deactivated) when creating or editing a campaign or you cannot add nodes to a campaign, you have not licensed that package. To upgrade your package, contact customer support.

- **Starter package**. Contains everything you need to set up the most relevant campaigns using Marketing Automation (for example, welcome message series, birthday mailing, reactivation campaign). A maximum of 50 start or branching points (nodes) can be in use per client.
- **Advanced package**. Includes the **Starter** package plus the following services:
  - Up to 250 start or branching points (nodes).
  - Using the **A/B Test** node, you can split campaign recipients by percentage then distribute them to various mailing routes, allowing you to optimize your campaign.
  - Using the **Change Recipient**, **Copy Recipient** and **Move Recipient** nodes, you can change the recipients' data and copy or move recipients to other recipient lists.

- **Ultimate package**. Includes the **Advanced** package plus the following services:
  - Multiple start or branching points (nodes).
  - The **Start In** and **From Campaign** nodes are two more powerful nodes with which you can combine multiple campaigns.

See **Marketing Automation nodes**.

Node	Starter	Advanced	Ultimate
Recipient New	✓	✓	✓
Open	✓	✓	✓
Click	✓	✓	✓
Reply	✓	✓	✓
Post Click	✓	✓	✓
Advanced	✓	✓	✓
From MA Campaign	✗	✗	✓
Wait	✓	✓	✓
Send Message	✓	✓	✓
Switch	✓	✓	✓
A/B Test	✗	✓	✓
Change Recipient	✗	✓	✓
Copy Recipient	✗	✓	✓
Move Recipient	✗	✓	✓

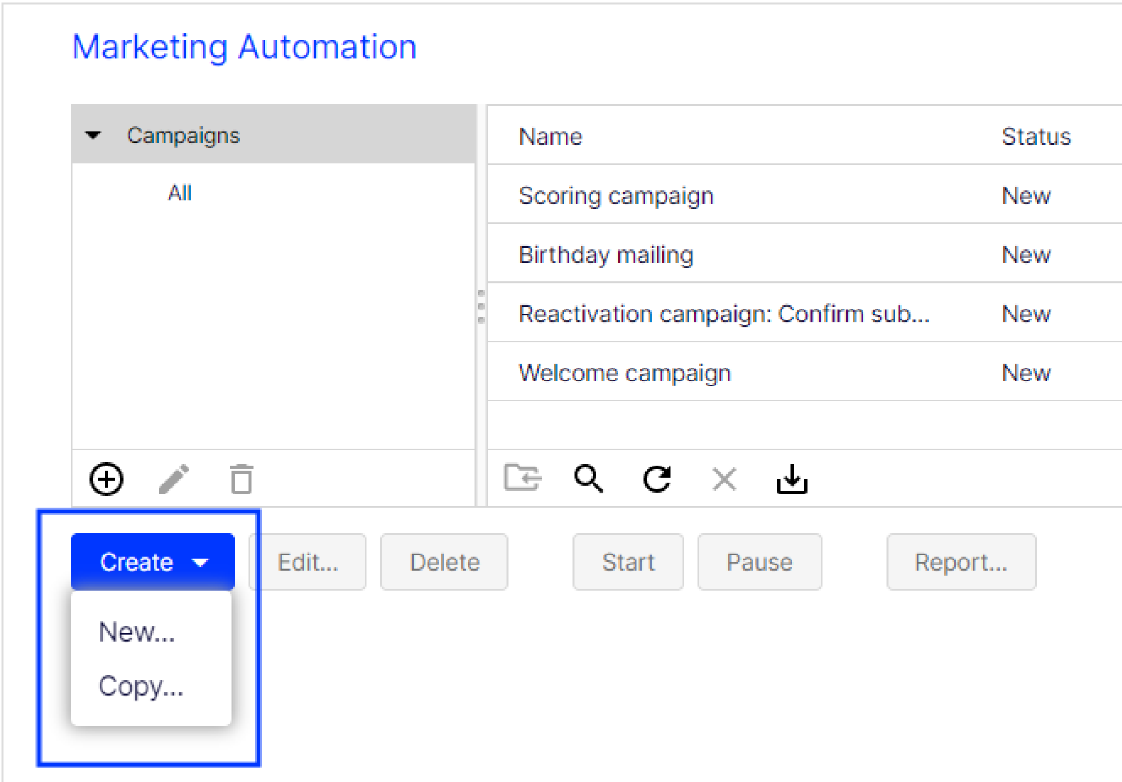
Node	Starter	Advanced	Ultimate
Start In	✗	✗	✓
Done	✓	✓	✓
Total number of active nodes per client	max. 50	max. 250	unlimited

Creating and editing campaigns

This topic describes how to create and edit a Marketing Automation campaign. Also learn how to start and pause a campaign, delete campaign drafts and delete a campaign permanently.

Creating a campaign

1. Open the Optimizely Campaign menu and select **Campaigns** > **Marketing Automation**.
2. Click **Create**.
   - To create a new campaign, click **New...**.
   - To use an existing campaign as a template, click **Copy...** in the drop-down list, choose your client and campaign, and click **Apply**.



3. Drag the nodes from the left action area to the working area on the right.
4. Connect the nodes and enter the desired settings. See Editing nodes and Marketing Automation nodes.
5. Click **Save Draft...**.
6. In the dialog box, enter a name for the campaign and click **Save**.

> **Tip:** If you already saved a draft of a campaign and want to display the running or paused version of it, open the campaign report. See Marketing Automation campaign report.

> **Warning:** Marketing Automation does not guarantee that mailings are sent in real time. Note the following hints on sending Marketing Automation messages.

- Use the HTTP API for time-sensitive mailings (for example, order confirmations or password reminders), because Marketing Automation mailings cannot always be processed in real time.
- Target groups within the same campaign that check on the dispatch of the message in a node may give false results because the mailing may not be sent. If you use such target groups behind the **Send message** node, there may be undesirable effects, as the target groups may not work. To avoid this, place a **Wait** node, which delays the execution of the action, in front of such nodes.
- If you place a **Send message** node behind a **Move recipient** node, you also should place a **Wait** node in front of the **Move recipient** node. Otherwise, the recipient may be removed from the recipient list before the message is sent.

Editing a campaign

To edit an existing campaign, select the required campaign from the list in the **Marketing Automation** window and click **Edit**. Proceed as described from step 3 in the **Creating a campaign** section.

Starting or pausing a campaign

To start a Marketing Automation campaign in the **Marketing Automation** window, select the campaign and click **Start**. Next, Optimizely Campaign validates the campaign's content. If errors are found, correct them by editing the campaign.

To pause a campaign, in the **Marketing Automation** window, select the campaign and click **Pause**. To resume the campaign, click **Start**.

> **Note:** If your Marketing Automation campaign contains a **Wait** node and you pause the campaign, the time specified in the node is not paused. That is, if the waiting time of the node elapses during pausing, the next action is executed as soon as the campaign is restarted.

Deleting a draft

To delete a version of a running or paused Marketing Automation campaign, in the **Edit Campaign** window, click **Delete Draft**.

> **Warning:** Deleting a draft reverts the current changes and all changes made since the start of the campaign. To revert the current changes, close the **Edit Campaign** window.

Deleting a campaign

To delete a Marketing Automation campaign in the **Marketing Automation** window, select the campaign and click **Delete**.

Marketing Automation nodes

The process of a campaign is defined by nodes that determine when a recipient passes through the campaign, and what actions are executed for the recipient. With the help of *connections*, you can link the nodes and specify the process of your campaign. The arrow at the end of each connection points to the succeeding node and the associated action.

> **Tip:** For the DACH region, a licensing model applies. If a node is grayed out (disabled), the Marketing Automation package has not been licensed. See Marketing Automation packages.

Start nodes define events that initiate the process of a campaign for a recipient. The following start nodes are available:

- Recipient New
- Open
- Click
- Reply
- Post Click

- From MA Campaign
- Advanced

Action nodes specify which actions are executed during a campaign. The following action nodes are available:

- Wait
- Send Message
- Switch
- A/B Test
- Change Recipient
- Copy Recipient
- Move Recipient
- Start In
- Done

Start nodes

Recipient New

Starts the process of the campaign for a recipient added to the recipient list.

Parameters	Description and values
Starts the Marketing Automation Campaign	Specify which recipients are passing through the campaign • **if recipient never passed through this MA campaign**: Recipients pass through the campaign if they ◦ are newly added to the recipient list. ◦ are not currently passing through the campaign. ◦ never passed through the campaign. • **if recipient is not currently passing through this campaign**: Recipients pass through the campaign if they are ◦ newly added to the recipient list. ◦ not currently passing through the campaign.

Parameters	Description and values
	Note: Recipients who already passed through a campaign but are newly added to the recipient list may pass through the campaign again. • **always**: Anyone newly added to the recipient list passes through the campaign.
Start Only for Recipients In(mandatory)	Only recipients of this recipient lists are passing through this campaign. **Note:** To start the campaign, you must specify a recipient list here.
Start Only For	Only recipients of this target group are passing through this campaign.

> **Note:** Recipients moved from one recipient list to another are considered new unless both recipient lists have been set up as opt-in lists. In this special case, the **Recipient-New** node would not include the moved recipients.

Open

Starts the process of the campaign for a recipient who opened the message.

Parameters	Description and values
Starts the Marketing Automation Campaign	Specify which recipients are passing through the campaign. • **if recipient never passed through this MA campaign**: Recipients pass through the campaign if they ◦ opened the message.

<table>
<tr><th>Parameters</th><th>Description and values</th></tr>
<tr><td></td><td>are not currently passing through the campaign.
never passed through the campaign.
if recipient is not currently passing through this MA campaign:Recipients pass through the campaign if they
opened the message.
are not currently passing through the campaign.
Note: Recipients who already passed through the campaign and who open the message again may pass through the campaign again.
always: Any recipient who opens the message pass through the campaign.</td></tr>
<tr><td>Mailings</td><td>Specify the mailings in which recipients must click a link. You can
specify a mailing, or
limit the mailing selection to
a mailing type.
a folder that contains the mailings.
the mailing's send date.</td></tr>
<tr><td>Start Only For</td><td>Only recipients of this target group are passing through this campaign.</td></tr>
</table>

Click

Starts the process of the campaign for a recipient who clicked a link in the message.

<table>
<tr><th>Parameters</th><th>Description and values</th></tr>
<tr><td>Starts the Marketing Automation Campaign</td><td>Specify which recipients are passing through the campaign.
if recipient never passed through this MA campaign: Recip-</td></tr>
</table>

<table>
<tr><th>Parameters</th><th>Description and values</th></tr>
<tr><td></td><td>ients pass through the campaign if they
clicked a link in the message.
are not currently passing through the campaign.
never passed through the campaign.
if recipient is not currently passing through this MA campaign: Recipients pass through the campaign if they
clicked a link in the message.
are not currently passing through the campaign.
Note: Recipients who already passed through the campaign and who click a link in the message again may pass through the campaign again.
always: Any recipient who clicks a link in the message pass through the campaign.</td></tr>
<tr><td>Mailings</td><td>Specify the mailings in which recipients must click a link. You can
specify a mailing, or
limit the mailing selection to
a mailing type.
a folder that contains the mailings.
the mailing's send date.</td></tr>
<tr><td>Links</td><td>Specify the links the recipients must click to pass through the campaign.</td></tr>
<tr><td>Click Profile</td><td>Specify the click profiles whose links the recipients must click to pass through the campaign.</td></tr>
<tr><td>Start Only For</td><td>Only recipients of this target group are passing through this campaign.</td></tr>
</table>

© Optimizely 2022

Reply

Starts the process of the campaign for a recipient who replied to the message or to whom the message could not be delivered.

<table>
<tr><th>Parameters</th><th>Description and values</th></tr>
<tr><td>Starts the Marketing Automation Campaign</td><td>Specify which recipients are passing through the campaign.

if recipient never passed through this MA campaign: Recipients pass through the campaign if they
replied to the message or created a bounce.
are not currently passing through the campaign.
never passed through the campaign.
if recipient is not currently passing through this MA campaign: Recipients pass through the campaign if they
replied to the message or created a bounce.
are not currently passing through the campaign.
<blockquote>Note: Recipients who already passed through the campaign and who reply to the message or create a bounce again may pass through the campaign again.</blockquote>
always: Any recipient who replied to the message or created a bounce pass through the campaign.
</td></tr>
<tr><td>Mailings</td><td>Specify the mailings in which recipients must click a link. You can

specify a mailing, or
limit the mailing selection to
a mailing type.
a folder that contains the mailings.
the mailing's send date.
</td></tr>
<tr><td>Type</td><td>Select one ore more response categories of the reply.</td></tr>
</table>

Parameters	Description and values
Start Only For	Only recipients of this target group pass through this campaign.
Minimum Interval	Select an interval that checks whether the recipient already passed this campaign (triggered by this start node). If the recipient has passed through the campaign since the last check, the recipient will not pass through the campaign until the next check.

Post Click

Starts the process of the campaign for a recipient that created a post click.

<table>
<tr><th>Parameters</th><th>Description and values</th></tr>
<tr><td>Starts the Marketing Automation Campaign</td><td>Specify which recipients are passing through the campaign.

if recipient never passed through this MA campaign: Recipients pass through the campaign if they
created a post click.
are not currently passing through the campaign.
never passed through the campaign.
if recipient is not currently passing through this MA campaign: Recipients pass through the campaign if they
created a post click.
are not currently passing through the campaign.
Recipients that already passed through the campaign and that create a post click again may pass through the campaign again.
always: Any recipient that created a post click pass through the campaign.
</td></tr>
<tr><td>Mailings</td><td>Specify the mailings in which recipients must click a link. You can

specify a mailing, or
limit the mailing selection to
a mailing type.
</td></tr>
</table>

Parameters	Description and values
	◦ a folder that contains the mailings. ◦ the mailing's send date.
Post Click	Select the post-click service. This is either the proprietary post-click tracking or the web analytics software you are using.
Start Only For	Only recipients of this target group pass through this campaign.
Include imported post clicks without recipient list	Select this check box if you want to evaluate imported post clicks the recipients of which cannot be assigned to any recipient list in Optimizely Campaign. This is, for example, the case when post clicks are imported from external sources or the recipient is logged in the web shop at the time of the post click, but has not registered for the newsletter. This setting does not apply to post clicks that can be uniquely allocated to recipients in existing recipient lists. With such post clicks, in which the email address is known, Optimizely Campaign checks whether this corresponds to a recipient in the replacement recipient list. Select the replacement recipient list in the next step. If the email address is found in this recipient list, this recipient is considered in the further course of the Marketing Automation campaign and can receive messages (provided that the other conditions are met).
Select Replacement Recipient List	Select the recipient list here to which the recipients of the imported post clicks are compared. Post-clicks that could not be assigned to a recipient from any existing recipient list at the time of their capture (see the previous parameter) are compared to this recipient list and are assigned with the matching email addresses. Imported post clicks that cannot be assigned to any recipient of this list are discarded. **Note:** You should create a **Standard** recipient list that contains the registered recipients and select this recipient list here. As a result, there is a high possibility that a post click can be assigned to a recipient.

From MA Campaign

Starts the process of this campaign for a recipient from another Marketing Automation campaign.

Parameters	Description and values

Starts the Marketing Automation Campaign	Specify which recipients are passing through the campaign.
	• **if recipient never passed through this MA campaign**: Recipients pass through the campaign if they
	  ◦ come from another campaign.
	  ◦ are not currently passing through the campaign.
	  ◦ never passed through the campaign.
	• **if recipient is not currently passing through this MA campaign**: Recipients pass through the campaign if they
	  ◦ come from another campaign.
	  ◦ are not currently passing through the campaign.
	
	Note: Recipients that already passed through the campaign and that come from another campaign again may pass through the campaign again.
	
	• **always**: Any recipient that comes from another campaign pass through the campaign.

Start Only For	Only recipients of this target group pass through this campaign.

Advanced

Starts the process of the campaign for a recipient that matches specific criteria.

Parameters	Description and values
Starts the Mar-	Specify which recipients are passing through the campaign.

© Optimizely 2022

Parameters	Description and values
keting Automation Campaign	• **if recipient never passed through this MA campaign**: Recipients pass through the campaign if they ◦ match the criteria of this node. ◦ are not currently passing through the campaign. ◦ never passed through the campaign. • **if recipient is not currently passing through this MA campaign**: Recipients pass through the campaign if they ◦ match the criteria of this node. ◦ are not currently passing through the campaign. **Note:** Recipients that already passed through the campaign and that matches the criteria of this node again may pass through the campaign again. • **always**: Any recipient that matches the criteria of this node pass through the campaign.
Start Only for Recipients In (mandatory)	Only recipients of this recipient lists are passing through this campaign. **Note:** To start the campaign you have to specify a recipient list here. If you select multiple recipient lists, no recipient cross check will take place. Therefore the same recipients can run the campaign several times if they are in multiple recipient lists.
Limit the Number of Recipients To	Specify the maximum number of recipients to be contacted. If this value is higher than the number of possible recipients, all recipients are contacted. **Note:** The maximum number of recipients depends on the defined interval. Example: If you limit the maximum number of recipients to 1000 and define a weekly interval, a maximum of 1000

Parameters	Description and values
	recipients are contacted each week.
Interval	Specify how often the criteria should be checked. You can set a daily, weekly or monthly interval and specify it even further. Optimizely Campaign checks at the specified time which recipients meet the criteria — these recipients then pass through the campaign. **Example 1:** If you set the interval to *Every 2 months, each 1st from 14:00*, the criteria is checked on the first day of every second month at 14:00. **Example 2:** If you set the interval to *Every 1 weeks, on Wednesday from 15:00*, the criteria is checked every Wednesday at 15:00.
Start Only For (mandatory)	Only recipients of this target group pass through this campaign. **Note:** To start the campaign you have to specify a target group here. **Note:** The examination of the criteria may take time to complete, so the following actions may be delayed.
Filter by Recipients Included in All Selected Visitor Intelligence Segments	Only recipients that are included in the selected Visitor Intelligence segments are passed through this campaign. **Note:** To make Visitor Intelligence segments available in Optimizely Campaign, you first must create segments in Optimizely Visitor Intelligence. See Creating a marketing segment.

Action nodes

Wait

During this time no action is taken.

Parameters	Description and values
Waiting Time	Specify how long no action is taken. After this time, the following action is executed.
Wait Only if Target Group Is	For recipients of this target group, no action is taken during this time. Remaining recipients skip this action.

Send Message

Sends a message to the recipient.

> **Warning:** For performance reasons, messages are sent asynchronously to the course of the recipient in the campaign.
>
> Note the following hints on sending Marketing Automation messages.
>
> - Target groups within the same campaign, that check on the dispatch of the message in this node, may give false results because the mailing may not be sent. If you use such target groups behind the **Send Message** node, there may be undesirable effects, as the target groups may not work. To avoid this, place a **Wait** node, which delays the execution of the action, in front of such nodes.
> - If you place a **Send Message** node behind a **Move Recipient** node, you also should place a **Wait** node in front of the **Move Recipient** node. Otherwise, the recipient may be removed from recipient list before the message is sent.

Parameters	Description and values
Mailing	Select the message to be sent to the recipient. Messages that you link here need to be created beforehand. Two functions are available for this purpose: • If you are working with Mailings Classic: Open the start menu and select **Campaigns** > **Mailings Classic** and create a mailing of the type **Special/API**. • If you are working with Smart Campaigns: Open the Optimizely Campaign menu and select **Campaigns** > **Transactional Mails**, and create a new message. **Note:** You cannot use a Mobile Push message and a Web Push message in the same Marketing Automation campaign. Create separate campaigns.
Send Only To	A message is sent only to recipients of this target group. Remaining recipients skip this action.

Switch

Allows the branching of a campaign based on target groups. The branches are processed hierarchically. That is, the lowest numbered branch has the highest priority and is executed first.

Parameters	Description and values
Target Group	Create a connection to the node whose action must be executed for a specific target group and specify this target group. You can connect nodes using different target groups. **Note:** If a recipient matches a target group, the corresponding action is executed. Optimizely Campaign does not check if the recipient matches another target group.

Parameters	Description and values
All remaining recipients	Create a connection to the node whose action will be executed for remaining recipients.

A/B Test

Allows the branching of the campaign based on predefined probabilities.

Parameters	Description and values
Percentage	Create a connection to the node whose action has to be executed for the recipients, and specify the probability of recipients passing through this node. You can connect nodes using different probability values.
All remaining recipients	Create a connection to the node whose action has to be executed for the remaining recipients.

Change Recipient

Changes a recipient's data. To use this node, you need the permissions that let you evaluate action-based data at user level.

Parameters	Description and values
Recipient List	Select the recipient list where you want to change recipient data.
Changes	Specify the changes that have to be made. 1. In the first list, select a recipient list field. 2. In the second list, select the action to be performed. • **set value to**: Replace current value with new value. • **append suffix**: Append value to existing value. • **prepend prefix**: Prepend value to existing value. • **toggle**: Toggle between current and counter value.

Parameters	Description and values
	Tip: This option is only available for boolean fields. These fields contain two values: `true` and `false`. If, for example, the "male" field contains the value `true`, it is replaced with the value `false`. • **time of pass-through**: Replace the current value with the time of the pass-through. The value is set to the time when the recipient passes through this node. • **increment value by**: Increment the current value by a certain value. • **decrement value by**: Decrement the current value by a certain value. • **clear**: Delete the current value. 3. In the last text field, enter a value. To change multiple recipient list fields, click + and repeat the steps.
Perform Action Only For	Changes are made only for recipients of this target group. Remaining recipients skip this action.

Copy Recipient

Copies the recipient into another recipient list. To use this node, you need the permissions that let you evaluate action-based data at user level.

Parameters	Description and values
Copy To (mandatory)	Select the recipient list to which to copy this recipient.
Overwrite existing recipient	Check the box to overwrite the recipient in the target recipient list (if the recipient is already contained in this recipient list).
Copy Only	Only recipients of this target group are copied to the recipient list. Remaining recipients skip this action.

© Optimizely 2022

Move Recipient

Moves a recipient to another recipient list. To use this node, you need the permissions that let you evaluate action-based data at user level.

Parameters	Description and values
Move To (mandatory)	Select the recipient list to which to move the recipient.
Overwrite existing recipient	Check this box to overwrite the recipient in the target recipient list (if the recipient is already contained in this recipient list).
Move Only	Only recipients of this target group are moved to the recipient list. Remaining recipients skip this action.

Start In

Starts the process of another campaign for a recipient. The recipient remains in the current campaign and passes though the other campaign in parallel. The other campaign must contain the **From Campaign** start node.

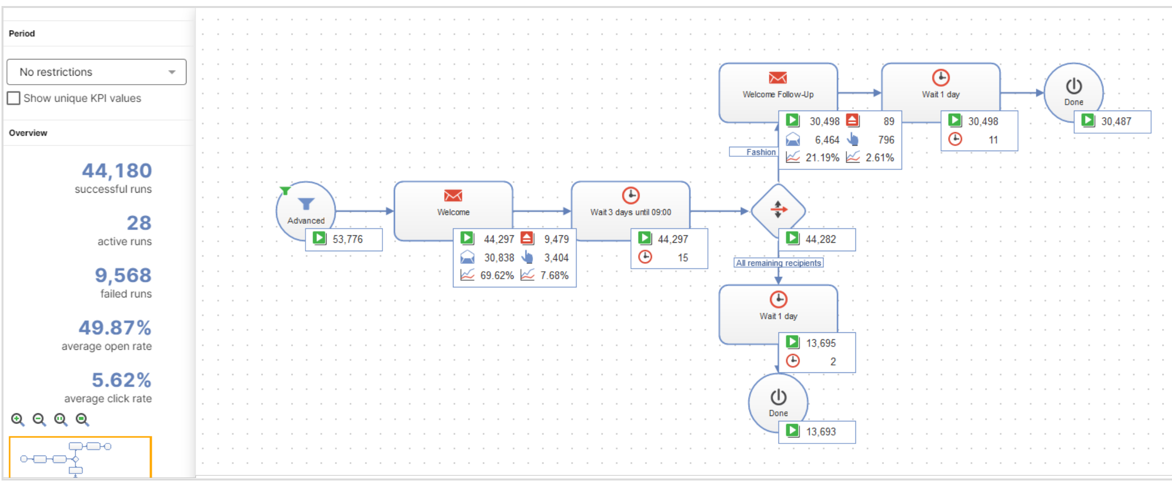
Parameters	Description and values
Marketing Automation Campaign (mandatory)	Select the campaign that the recipient has to pass through.
Beforehand Copy To	Optionally select if the recipient must be copied to another recipient list before he passes through the campaign.
Overwrite existing recipient	Check this box to overwrite the recipient in the target recipient list (if the recipient is already contained in this recipient list).
Perform Action Only For	Only recipients of this target group are passing through the other campaign. Remaining recipients skip this action.

Done

Marks the end of the campaign. This is an optional node.

Campaign report

To view the campaign report, open the **Marketing Automation** window, select a running or paused campaign, and click **Report**.



The Marketing Automation campaign report shows in the left overview area the number of successful, active, and failed runs of the campaign as well as the average opening and click rate of the campaign mailings.

At the individual campaign nodes you can also find information about the successful runs and failed runs .

At the **Send message** action node you can furthermore see opens , clicks and the open and click rates . For the *No restrictions* period, you can optionally display the unique opens, clicks and the unique open and click rate by selecting the **Show unique KPI values** check box.

If you use a **Wait** node in your campaign, the currently-waiting recipients are also displayed.

> **Tip:** If a recipient did not receive the message via a **Send Message** action node (for example, because the recipient is blocked or exceeded the bounce limit), this event appears as an error for the node. You can find information about the recipients of a marketing automation campaign in the recipient history under Marketing Automation history.

Marketing Automation guide

Create more effective email marketing using a graphic interface with drag-and-drop functions to develop multi-step campaigns based on action- and event-based mailings. These campaigns are perfectly adapted to a highly diverse set of target groups, using automated distribution cycles.

Optimizely Campaign's graphic editor lets you create elaborate campaigns for your customer database, then refine them after the campaign is running. This guide provides actual examples that you can use "as is" or with minor adjustments.

Benefits

- Lifecycle marketing made easy via drag and drop
- Sustainable, automated cultivation of customer relations
- Maximum flexibility of campaign design
- Increased revenue through automated cross-selling and upselling campaigns
- Optimal visibility and precise timing; supports several parallel campaigns
- Focused on individual recipients and simple content filtering options
- Practical real-time analyses by overlay

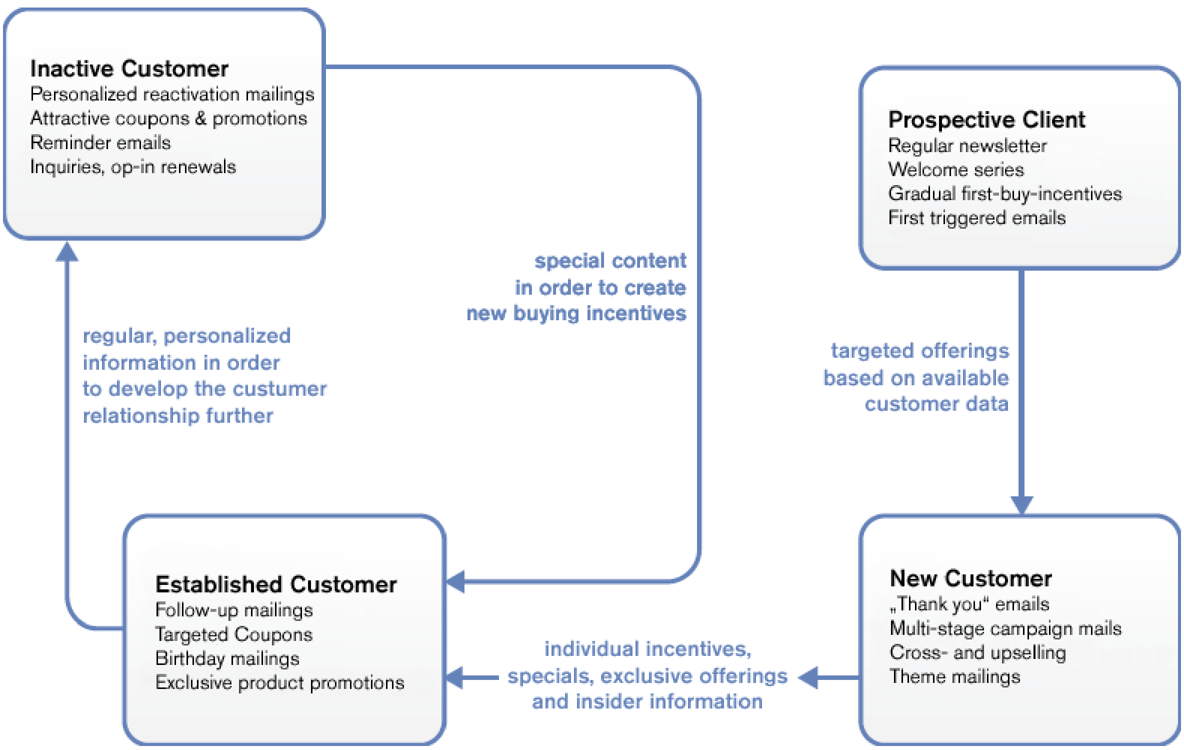
What is lifecycle marketing?

Email content should be oriented to a recipient's interests and personal circumstances. Lifecycle marketing shapes each customer relationship by communications that pass through a series of phases. Each phase is characterized by changing expectations that can

© Optimizely 2022

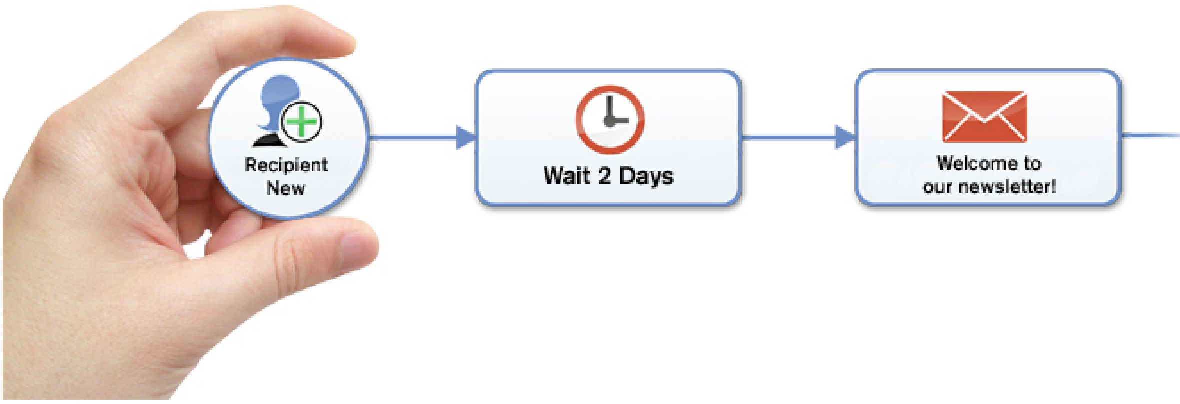
be divided into segments, such as **new customer**, **regular customer**, and **inactive customer**.

You want to draw potential consumers to your company's brand and products, and transform general interest into a willingness to purchase, supported by appropriately targeted inducements. When a consumer becomes a customer or a long-term regular customer, you want to provide new impulses through well-defined and properly-dosed emails. By applying the right analysis strategy to an ever-expanding database, you can obtain a better picture of your customers and target measures such as periodic incentives or post-profiling. When you win back inactive customers, the lifecycle marketing strategy is complete.



Cultivating customer lifetime value

Lifecycle marketing tries to cultivate *customer lifetime value* (CLV) into a viable concept that benefits your company and its products. To do this, Optimizely Campaign creates a series of automated mailings for events and target groups. CLV is the profit contribution that a customer realizes during his "lifetime" as a customer. In addition to past revenue, it considers anticipated future revenue and customer potential. CLV thus exceeds conventional campaign performance measurements. Moreover, this indicator includes customer sales trends, allowing for targeted email marketing aimed at generating appropriate purchasing inducements.



You want to find a profitable means of addressing a variety of customer scenarios over the long term. For example, an automated reactivation campaign is preferable to a one-time effort at winning back regular-but-currently inactive customers. Such a campaign systematically solicits this customer group over an extended time period. This approach also helps ensure that no customer "falls through the cracks," preserving customer value. Marketing managers can devote considerably more time to the content of their promotions and continued development of campaigns.

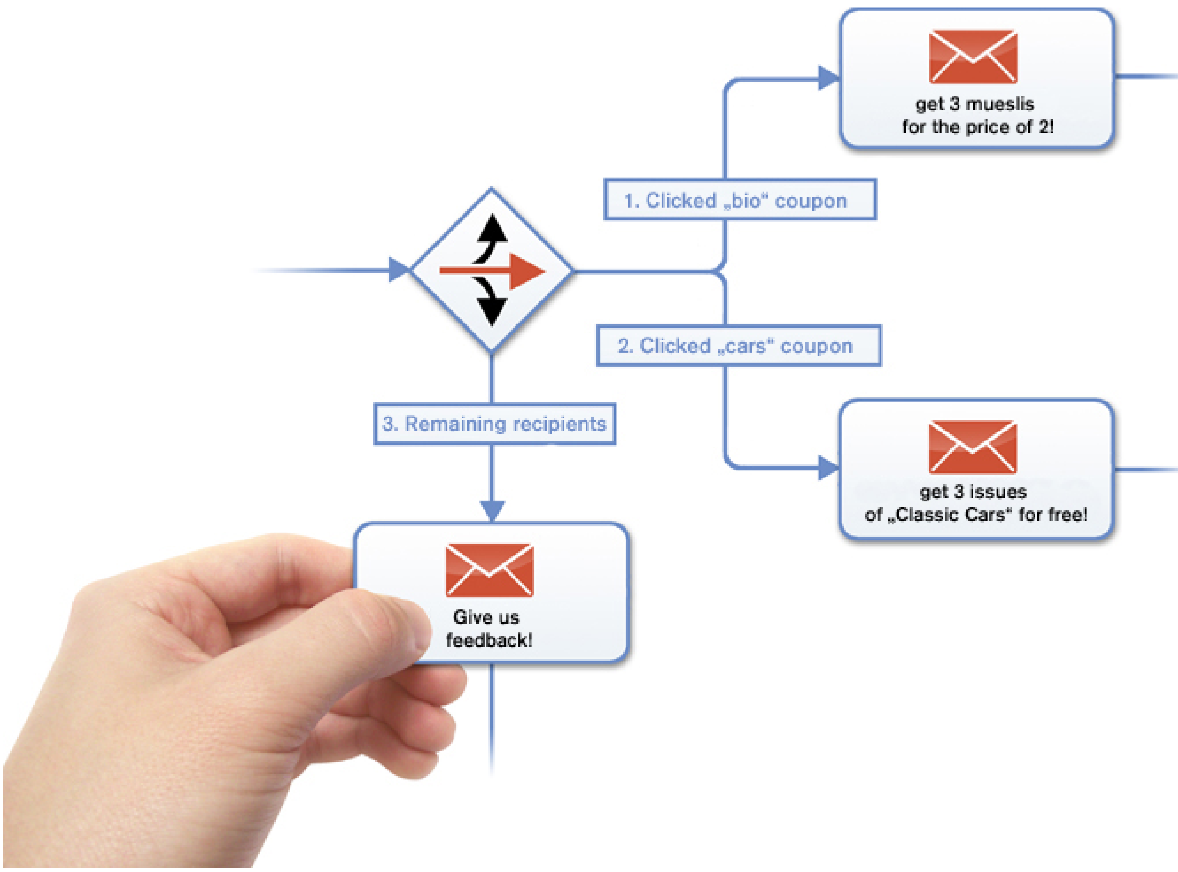
Marketing Automation for every need

Maintaining customer relationships is more complex than winning over new customers. Customer care in lifecycle marketing means consistently addressing the customer according to their status and interests. A contact strategy should be evolutionary, methodical, and forward-looking. Direct prompts and incentives toward obtaining desired responses and targeted feedback are initiated. Effective Marketing Automation improves customer care. Successful campaigns produce higher customer satisfaction and provide for targeted responses to the needs of regular customers.

While conventional approaches can support a few standard segments and customer lifetime phases, Optimizely Campaign makes more effective use of your customer data to customize implementation. You can decide to display an entire customer lifetime cycle in a central campaign, or roll out several individual campaigns.

From concept to the campaign

A user-friendly interface lets you turn an idea into a campaign. Use your computer mouse to mark starting and ending points. Then, with the aid of nodes and branches, retrieve your parameters in Optimizely Campaign and incorporate them into a campaign.

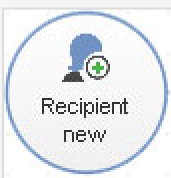
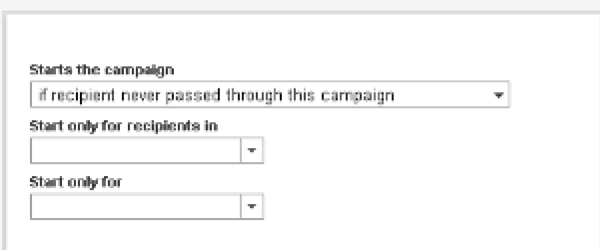


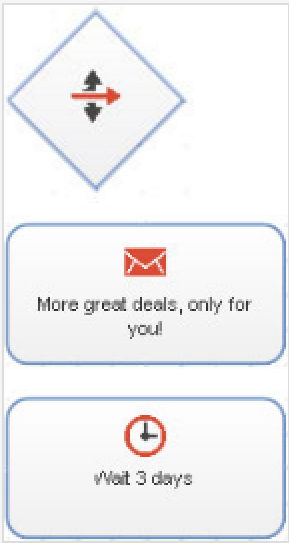
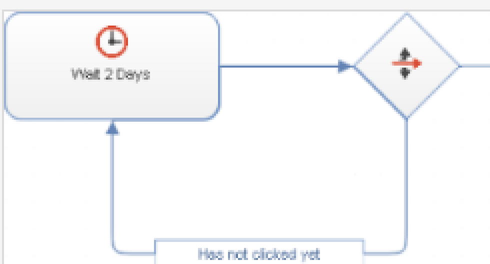
Each node stands for an action or event (such as sending birthday email as trigger-mail), or for filtering addressees by target group. By linking two nodes, you create a sequencing plan that anyone can follow. You can assign parameters to any node, such as click profiles, target groups or individual mailings. Marketing Automation automatically checks link logic among nodes and verifies that no nodes lead to dead ends.

You can add partial or intermediate steps for specific addressee groups. For example, if you want to communicate with only addressees who opened their discount mailing three weeks earlier, select the appropriate target group as parameter. Other addressees in your distribution list are unaffected but may be considered for a different discount mailing. As you get to know you customers better through additional campaigns and analyses, you can create additional segments and reconfigure the way you communicate benefits.

Developing the perfect campaign takes time and analysis. You can modify and refine a campaign to properly align your marketing goals while moving toward perfection. You can save modifications as drafts then transfer them to a running campaign with no downtime.

Campaign building blocks

Blocks	Description
	**Start node** Defines the action or event that triggers by the campaign, such as a registration, a clicked link, or a post click. Also defines recurring events, such as an addressee's birthday. Start nodes use blue icons.
	**Prerequisites** Set each campaign so it runs once or several times. You can also specify that an addressee cycles through a campaign only once at any given time.

Blocks	Description
	**Action nodes** A campaign may contain multiple action nodes. Each action node stands for one action. You can send out mailings, segment target groups, or set it to wait. If an action node is assigned to a target group, the action goes to addressees in that group only; other addressees skip this node and continue to the next node.
	**Loop** Campaigns may contain loops that an addressee cycles through several times until a criterion set for that loop either applies or no longer applies. The built-in campaign validation function evaluates whether an endless loop is inadvertently included in the campaign. If so, it prevents that campaign from being initiated.

Promoting on anniversaries

Anniversaries are opportunities to contact your customers and maybe include a coupon. You can use the dates of registering with your site, newsletter signup, or a birthday, provided in an optional form field.

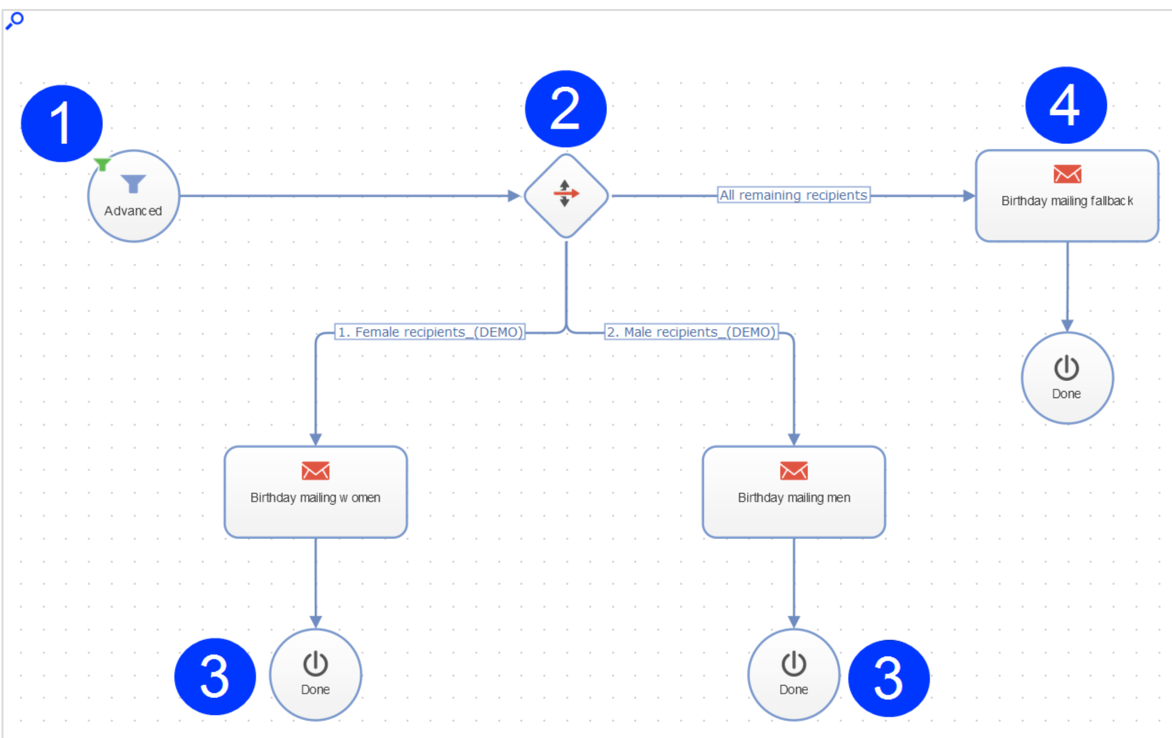
For example, set up a target group formatted as **recipient list field: birthday: is anniversary**. You may want to include a coupon in a birthday mailing. Create three mailings:

- one with an image for men
- one with an image for women
- one (labeled "fallback" in the image below) with a neutral image for recipients whose gender is unknown

The following steps set up this example.

1. Use the **Advanced** node as the starting node. This queries target groups at set intervals. With birthday mailings, a target group should be screened daily for **has birthday**.
2. Create a branch node to sort recipients by gender.
3. Each group receives the appropriate birthday mailing.
4. Recipients whose gender is unknown receive the third mailing.

> **Tip:** You may set up an anniversary campaign in the same manner. Change the target group to **has anniversary**.



After-sales recommendations

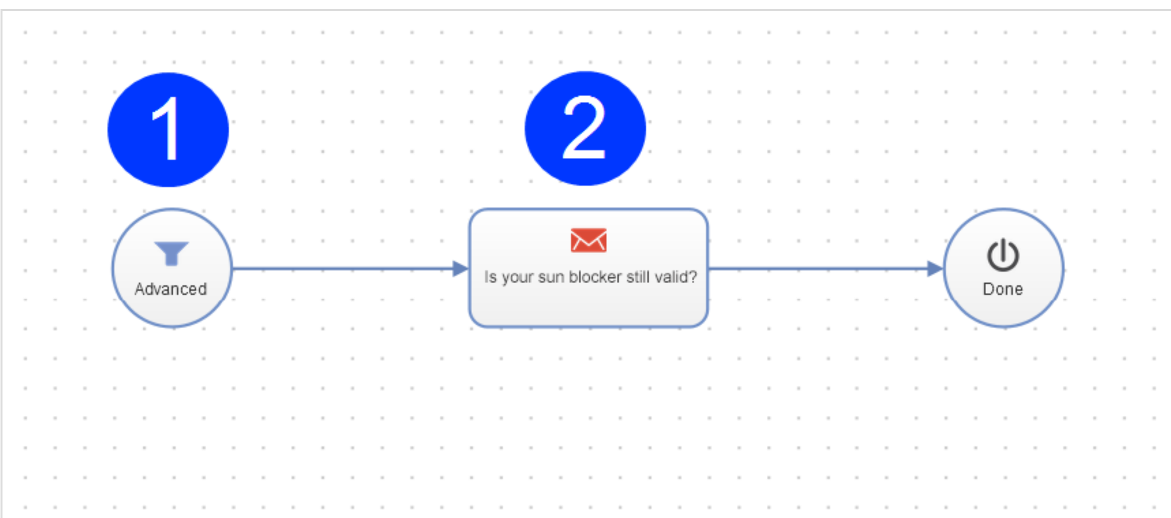
Prompt customers who made previous purchases to order more products through after-sales recommendations.

The following example uses customers of an online drugstore who purchased sunscreen the previous year. You want to contact customers whose last purchase is more than 10 months ago, remind them of the sunscreen's expiration date, and suggest they obtain a fresh supply.

For this campaign, first incorporate post-click tracking in the drug store's web shop. This provides information about when a customer purchased a product in the category *sun-screen*. Next, set up a target group with the filter: **recipient purchased a product in the category sunscreen exactly 300 days ago**. This group generates a mailing that includes a notification about the expiration date, product recommendations, and a coupon for sun-screen. This mailing is called *Has your sunscreen expired? – Buy now and save!*

To set up this campaign, follow these steps.

1. Because this campaign responds with a time delay rather than a transaction, use an **Advanced** start node rather than a **Post-click** node. The parameter for the node is the previously-specified target group. The campaign is started daily.
2. Recipients filtered by this node receive the previously-created mailing.



Reactivation campaigns

Contact customers who recently ignored your promotions. Reactivating inactive customers offers multiple means for increasing revenue while maintaining and cultivating your customer master list.

A reactivation campaign should investigate reasons for inactivity, offer incentives to become an active customer again, and allow those interested to confirm their interest in your newsletter. A recipient who does not respond, that is, does not renew his opt-in, is preferable to a recipient who remains inactive. You may also want to offer inactive recipients an option to receive your newsletter less frequently (for example, monthly rather than weekly) or temporarily suspend receipt.

A reactivation campaign should consider these factors and provide flexible responses that correspond to customer reactions. The point at which a recipient is considered inactive varies depending on the product being advertised in the newsletter. For a travel agency, you can presume a 12-month purchasing cycle. That is, you expect a recipient to make large-scale travel plans once a year and seek suitable offers accordingly. For other business sectors, the cycle may be considerably shorter.

Based on this definition of an inactive recipient, you would create a target group with two qualifiers, one of which should apply in each case:

- Addressee has not clicked on any mailing in the past 730 days (2 years)

  OR

- Addressee has not opened a mailing in the past 365 days.

Planning a multi-stage campaign

When planning a multi-stage campaign, several mailings are necessary.

- *Haven't heard from you in a while*. Contains the latest travel offers.
- *How can we serve you better?*. Requests that the recipient update his or her user information.
- *Receive our newsletter once a month*. Lets recipients switch newsletter frequency to monthly rather than weekly. Another button is *Suspend newsletter for 6 months*.

Both buttons are linked to a landing page that confirms the change. You can also configure a preference center with these features.

- *A coupon for you.* Recipients who clicked an item during the first reactivation campaign receive a coupon.
- *Thanks for your feedback!* Recipients who click the link to the preference center receive this mailing.
- *Please confirm your subscription.* Lastly, recipients who responded to none of the previous mailings should be prompted to renew their opt-in. The mailing should include an opt-in link.

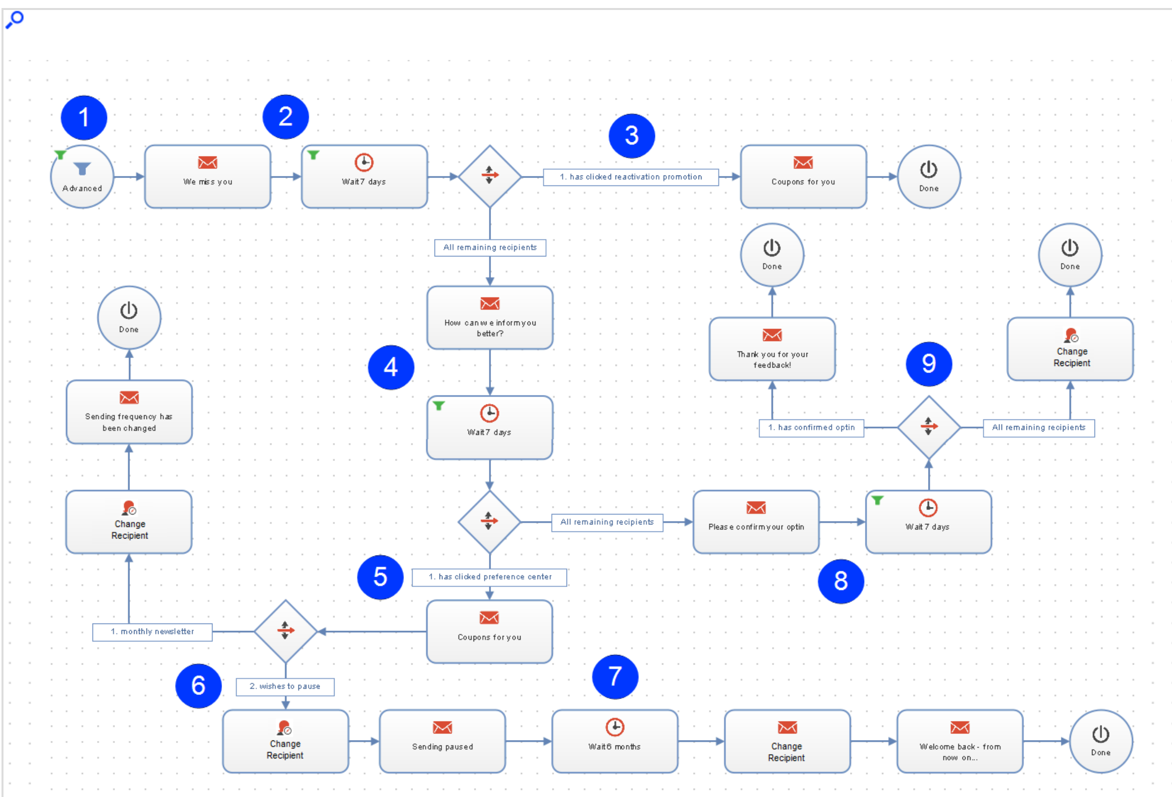
> **Note:** Mailings used in conjunction with Marketing Automation must be set up as **Transactional mails** and be in **Send** status.

Setting a reactivation campaign

1. Start with an **Advanced** node.
   - This node type inquires once a week whether a recipient is in the **Inactive recipient** target group.
   - In the node, select the qualifier **Addressee has never cycled through the campaign**, because each recipient should cycle through the campaign only once.
2. The mailing *Haven't heard from you in a while* is sent out, then wait 7 days. The **Wait** node is assigned the target group **has not responded to 1st reactivation**, so recipients who click that mailing are directed to the next node.
3. Recipients who click an offer in the mailing *Haven't heard from you in a while* receive a coupon for other compatible offers. The reactivation campaign is over for these recipients.
4. Recipients who did not respond to the first reactivation campaign (neither opened nor clicked) receive the second reactivation campaign, *How can we serve you better?*, then wait another 7 days. The **Wait** node is assigned to the **has not responded to the 2nd reactivation** target group, so recipients who click the preference center link in this mailing are directed to the next node.
5. Addressees who clicked the link to the preference center in the second reactivation mailing also receive a coupon for offers suitable to their preferences.

© Optimizely 2022

6. The recipients’ preferences are modified in accordance with their selection: For those recipients who clicked the link **Receive newsletter monthly**, the **frequency** recipient list field is set to **monthly**. A confirmation mail is sent regarding the mailing frequency change.
7. For recipients who clicked the **suspend delivery for 6 months** link, the **suspend** recipient list field is set to `true`. Insert a **Wait** node with a value of 6 months. Then, the **suspend** recipient list field is reset to `false`, and a *Welcome back* message is sent to the recipient.
8. Other recipients who have not responded to a reactivation mailing receive the *Please confirm your subscription* mailing. Insert a **Wait** node with a waiting period of 7 days. The **Wait** node is associated with a target group **has not responded to 3rd reactivation**, so recipients who confirm their opt-in are immediately directed to the next node.
9. Recipients who click the opt-in link also receive a *Thank you for your feedback* mailing, along with a coupon. Other recipients are marked as unsubscribed.



Multi-stage series of welcome messages

A series of welcome emails can help develop customer value. Use multistage campaigns to acquaint new subscribers with your products and services. Recipients are particularly receptive to receiving a newsletter immediately after registration. This series of emails should comprise welcome messages followed by email with relevant content. Of most importance is a sustained, persuasive effort in the form of individual, premium offers.

The following example uses a travel service's online portal for which you want to establish trust by recipients and learn more about their specific interests. To this end, begin by creating suitable mailings, click profiles, target groups, and coupons for the campaign.

The initial mailing should be a welcome mail without promotional content that summarizes the portal's products and services. The mailing includes test/user ratings and short statements from other rating portals that give the recipient a better understanding of what the portal offers. This mailing might be called *Welcome to Travel Deluxe*.

A second mailing, to be sent two days after the *Welcome to* mail, includes an incentive in the form of a coupon and additional information about travel preferences. So, you can offer several coupons, each tied to a different travel destination.

In addition, click profiles are created for secondary links that divide the offer into three categories: *Hiking & Nature*, *All inclusive* and *Culture*. This is placed under a mailing named *Our Gift to You*.

> **Note:** Mailings to be used with Marketing Automation must be set up as **Transactional mail** and be in **Send** status.

When these steps are taken, review how this campaign looks in association with Marketing Automation. The campaign should begin via the **Recipient New** start node for recipients newly added to the main recipient list (either through self-registration or import).

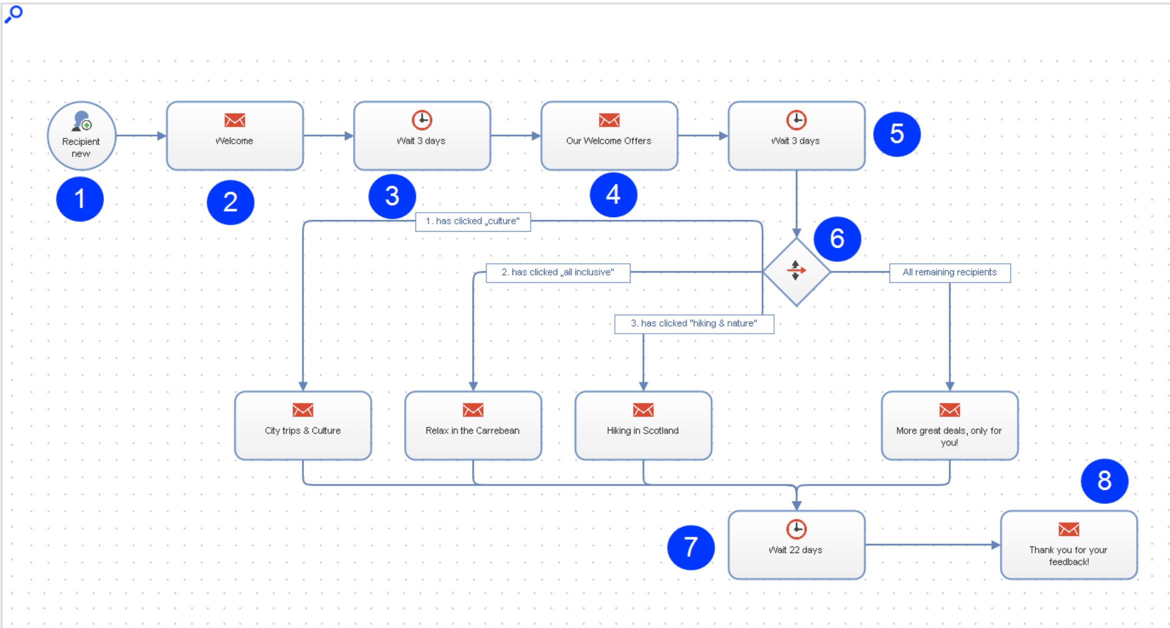
1. A multi-stage series of welcome mails begins via the start node **Recipient New**. This ensures that only recipients who are new newsletter subscribers and recently added to the recipient list are cycled through this campaign.
2. Drag the **Send Message** action node into the workspace, select the type of mailing to be distributed in the node's **Properties** field, then link the start node to it.

© Optimizely 2022

3. After the recipient receives the first welcome email, he gets a short breather using the **Wait** action node. The duration is set in the properties window of the **Wait** node once it is linked to the previous node. In this example, the count is **3**, and the unit is **days**. So, the recipient waits 3 days before the next action is carried out.
4. Select the subsequent mailing using the **Send Message** action node. This mailing contains the coupon offers including click profiles, as described above. This sends out individual, follow-on emails with reinforcing messaging. To do this, drag the action node into the workspace, select the mailing, and link the node.
5. To give the recipient sufficient time to read and click, drag the **Wait** node to the workspace and set up **3 days.**
6. This step is essential for distributing the follow-up mailings. The action node **Switch** lets the recipient receive different mailings based on target groups. In this case, four mailings will be employed following the branch. These mailings are placed behind the **Switch** node with the aid of the **Send Message** node, as shown in the diagram. Next, individual branches are set and linked to the nodes. One target group is allocated to each branch.

   In this case, three branches are assigned to target groups, while one branch is defined for recipients who correspond to none of the target groups. If a target group does not match the **Send Message** node with which it is associated, it skips over this node, and the mailing is not sent to the recipient.

7. As required, the recipient should receive a feedback mailing 28 days after registering. If you subtract the 2x3 days employed by the wait-nodes from this 28 day period, you should place a **Wait** node with a value of **22 days**.
8. After being on the recipient list for 28 days, by using an additional **Send Message** node, the recipient receives this campaign's final mail.



Cross- and upselling

Lifecycle marketing builds increased interest and purchasing incentives through campaign emails, trigger mails, and themed mailings. It provides added value by supplying the customer with relevant and helpful purchase or reservation information.

For example, while booking a flight, provide recommendations for hotel, car rental, area restaurants, and other activities. On returning from the trip, offer a photo album that can be purchased online to use for vacation snapshots.

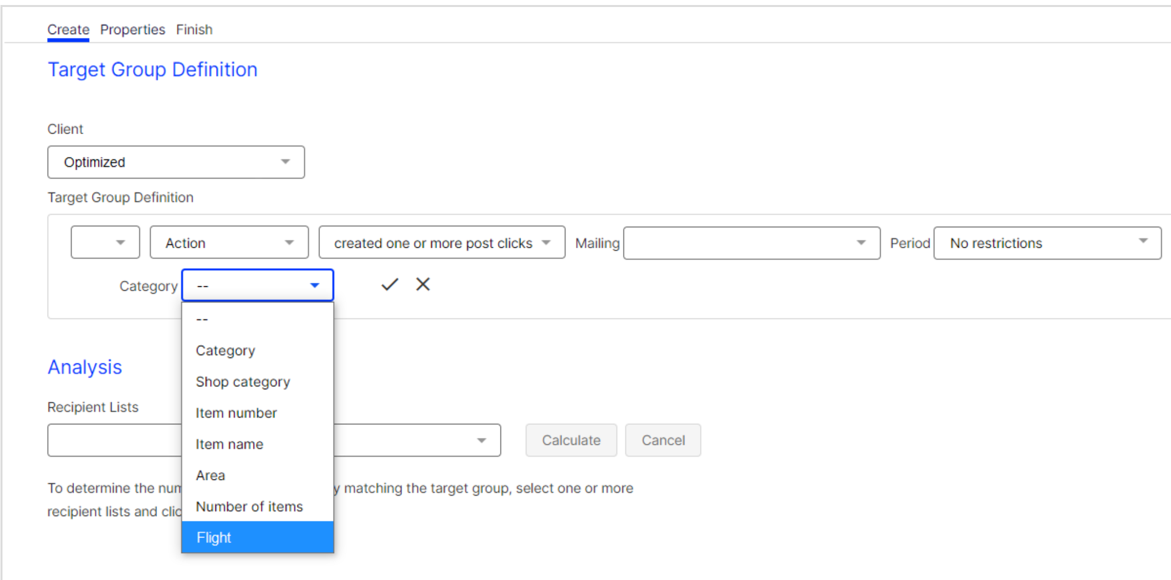
To use cross- and upselling offers, set up post-click tracking in your web shop to provide the following data:

- Which product did the customer purchase?
- Was the purchase completed?
- Arrival and departure dates
- Optionally, the value of the order

> **Tip:** To set up post-click tracking, contact customer support.

Allocating target groups and mailings

To later select the correct mailing with corresponding hotel and rental agency recommendations, allocate a target group to each destination. The target group definition would be: *Addressee generated a post click in the category flight with the value Mallorca / Grand Canary Islands / Sardinia / Athens / Antalya /* and so on.



An additional target group checks if the date-of-return matches the current date.

Next, allocate a mailing to each travel destination (or create a mailing with a paragraph about each destination) and associate it with a target group. In the following example, a paragraph is included in the mailing for each target group set up during the previous step. To keep promotions up-to-date, this paragraph is linked to a content interface. You also need a mailing to distribute when a customer returns home, which looks the same to all recipients:

- *Before you fly: Our hotel recommendations*
- *Welcome back! Here's a place to put your vacation pictures*

> **Note:** Target groups compiled with the help of post-click data look different depending upon the configuration of the post-click tracking or the web-analysis software. For instance, with some web-analysis

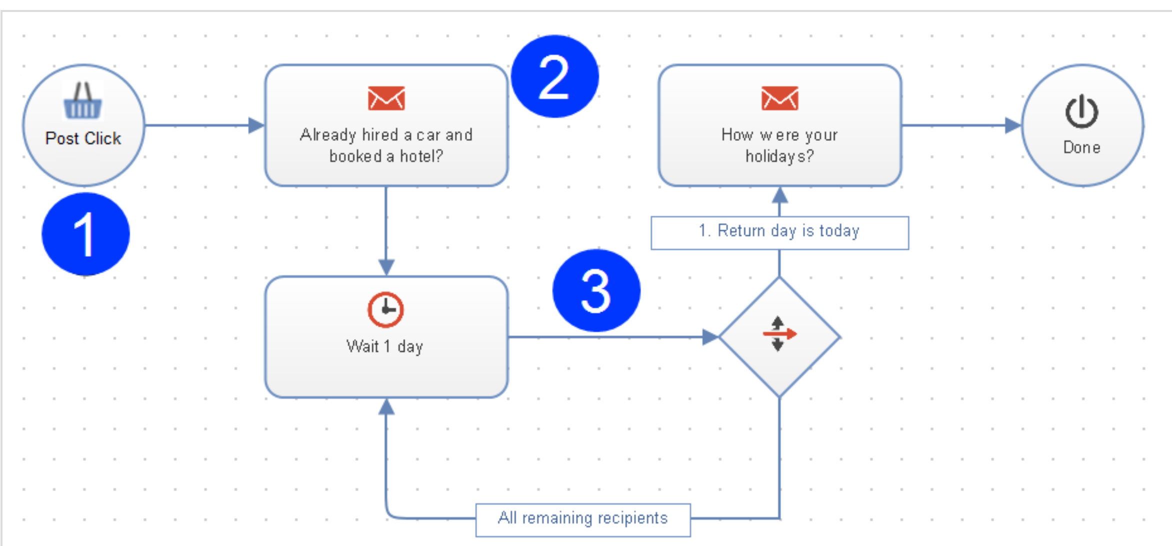
> products, you can select the **product purchases** category then specify greater detail. The example here is based on a post-click configuration tracking where a post click is produced only after an order is completed, eliminating the need for that pre-selection.

The following image shows how to create the *Before you fly: Our hotel recommendations* mailing.

1. Use the **Post-click** node and set the parameter *category same as flight*.
2. The selection of destination, and corresponding hotel accommodations, in the mailing occurs by target group. So, choose this mailing and send it to the recipients.

   To expand this campaign to include other promotions, such as for rental cars, modify the mailing and the paragraphs within it.

3. Incorporate a loop that inquires daily whether the return date equals that day's date. A **Wait** node is set with a value of *1 day* and, after it, a branch that filters the target group *return date is today*. This group receives the mailing, *Welcome Back: Now here's a place to put your pictures* with a coupon to order the photo album. Other recipients are reset to the **Wait** node.



Dealing with canceled transactions

Customers abort orders, purchases, and other transactions for many reasons. If a customer places a product in a shopping cart, that usually indicates interest in that product. A targeted campaign can give the customer an incentive to complete the transaction.

In the example below, customers who abort transactions are sent a coupon and recommendations for related items. Web analysis filters out recipients who put a trip/tour in a shopping cart but did not complete the transaction. You can use a web-analysis tool to transfer records of sales/reservation cancellations directly to Optimizely Campaign.

> **Tip:** Web-analysis tools let you simultaneously generate suitable recommendations for transaction cancellations, transfer those to Optimizely Campaign, then create a campaign aimed at this grouping. Contact customer support about connecting web-analysis software to your client.

Using categories and target groups, create paragraphs in a mailing that describe trips/tours similar to the canceled one. Send this mailing to those who canceled transactions.

```
Recipient generated a post click in service "Analytics" with a value of "Mal-
lorca" /
"Grand Canary Islands" / "Sardinia" / "Athens" / "Antalya" / in the category
"Transaction cancellation".
```

You must assign a target group to each destination.

The campaign is carried out in two steps, requiring two mailings: a coupon mailing, and a mailing containing recommendations:

- *May we recommend*
- *Book now and redeem your coupon*

A separate paragraph is inserted into the mailing for each target group created in the previous step.

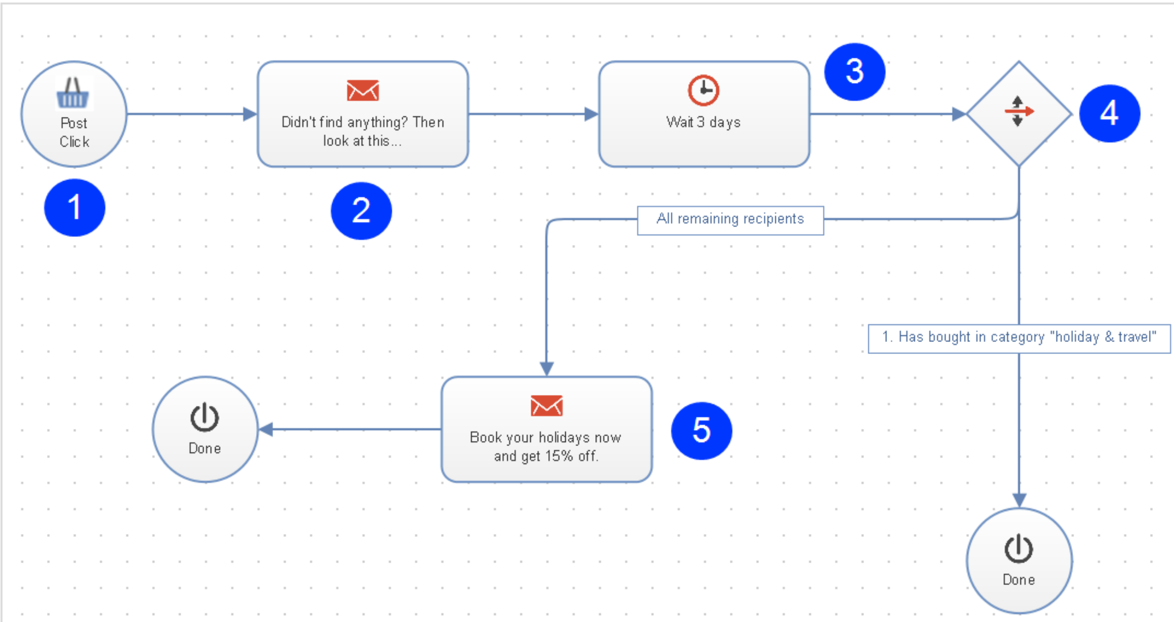
The target groups for this campaign are the same used for the cross- and upselling campaign, except that the **transaction cancellations** category is tracked. Using web-analysis software, the target group looks something like this:

1. Addressee generated a post click
2. In the service **Analytics**
3. In the **transaction cancellation** category
4. Using the word

- Mallorca
- Gran Canary Islands
- Sardinia
- Athens
- Antalya
- ...

The following steps show how to create a campaign for transaction cancellations.

1. Use a **Post click** node. The **Analytics** service and the **transaction cancellations** target group are set as parameters for the node.
2. Filter recipients by this node to get recommendations relating to the trip/tour previously considered. Target groupings determine the recommendations in the mailing.
3. Set a **Wait** node to a value of **3 days**.
4. Set a branch. For each target group, recipients who purchased a trip/tour are filtered out using the **has purchased** target group created previously. For these recipients, the campaign is concluded.
5. Recipients who did not make a purchase get a coupon mailing.



Multi-stage campaigns

This type of campaign introduces regular recipients to products and services. It requires little effort to execute because the mailing content remains essentially the same. By modifying the subject lines and the order of paragraphs in a mailing, you can highlight a product's benefits and characteristics.

Use post-click tracking to conduct a multistage campaign, which uses target groups to filter recipients who generated a conversion.

> **Note:** Alternatively, you can configure target groups that filter recipients who clicked the registration link for your web shop in an email. This type of target group produces less precise results because it includes recipients who clicked a link but did not complete the registration or purchasing process.

Prerequisites

For multi-stage campaigns you need various mailings and target groups:

Mailings

- Principal mailing (type: regular) with two split mailings, each with a modified subject line (**re: A and B**).
- 2 copies of the principal mailing (type: special), each with a different subject line (attract interest, call-to-action) (**re: C and D**).
- Alternate version of the principal mailing (type: special) with the content rearranged or modified to shift the mailing's focus (**re: E**).
- Copy of this variant (type: special) with a different subject line urging call-to-action (**re: F**).

Target groups

- Recipients who received the principal mailing or one of the split mailings.
- Recipients who did not open the principal mailing.
- Recipients who did not open the second mailing.
- Recipients who did not open the third mailing.
- Target group that analyzes post clicks and matches recipients who generated a conversion (for example, completed registration or purchase).
- Recipients who opened a mailing but did not generate a conversion.

Creating a subject line split mailing

The first stage of the campaign consists of a classic A/B split test, used to determine the subject line that generates the greatest number of openings or clicks. The mailing that performs best is then sent to the remaining recipients. The automated campaign begins 24 hours later, when recipients are sent additional mailings in several stages.

1. Create a principal mailing with desired content.
2. Prepare a split mailing from the principal mailing, with subject line version A.
3. Prepare a second split mailing from the principal mailing, with subject line version B.
4. Go to **Automatic selection of best split for principal mailing** and select **best unique opening rate** or **best unique click rate**, and set a 1-day delay for automated distribution of the principal mailings.
5. Save the settings.

© Optimizely 2022

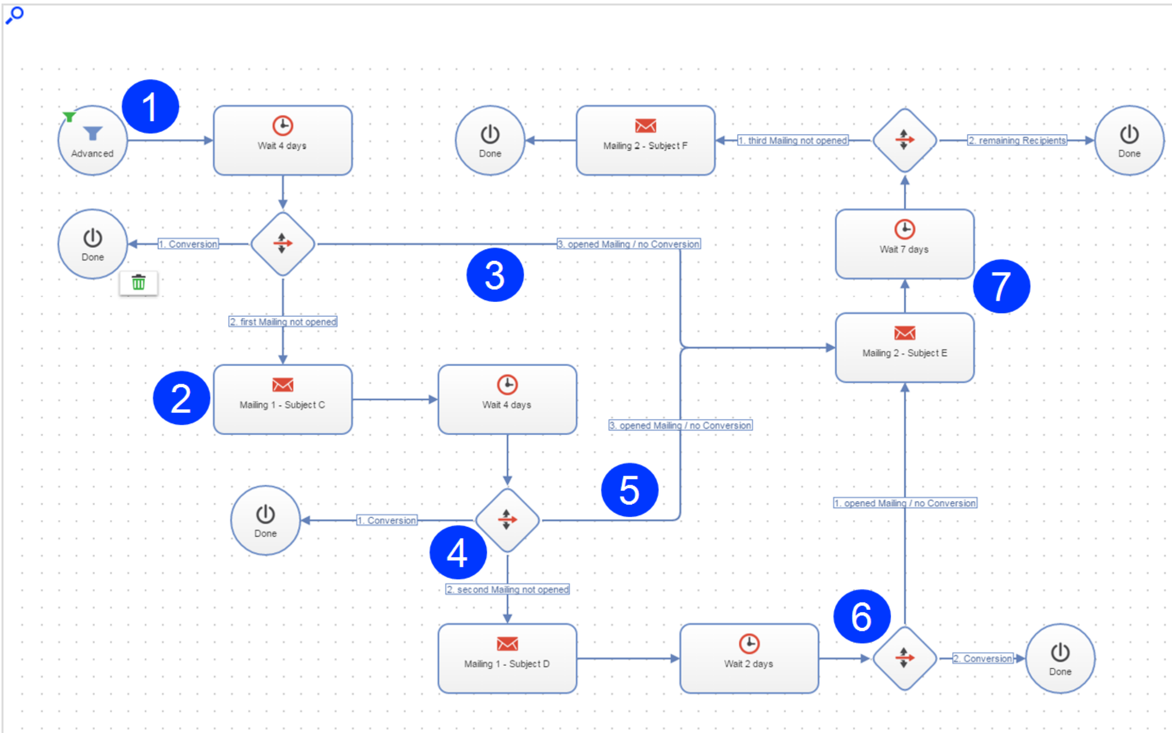
6. Launch the split mailings, either manually or automatically.

> **Note:** The following campaign must be created **before** the split mailing is launched, and mailings in this campaign must be set as **Transactional mail**.

Following up with automated distribution mailings

Create a campaign that launches after the principal mailing is sent out.

1. Start with an **Advanced** node to filter recipients who received the principal mailing or one of the two split mailings. Initially, the standby time is set to four days to provide recipients sufficient time to respond.
2. Recipients who have not opened this mailing and have not completed registration receive the modified subject line C. They are given another 4 days to respond.
3. Recipients who open the first mailing during this period, but have not generated a conversion, do not receive mailing C. Instead, they are sent the two-stage reminder that concludes the campaign. The campaign terminates for recipients who generate a conversion.
4. Recipients who have not opened mailing C are sent another mailing with subject line D.
5. As in step 3, recipients who opened mailing C during this period, but who have not generated a conversion, are sent the two reminder mailings. The campaign terminates for recipients who generated a conversion.
6. After another 4 days, recipients who completed registration are filtered. For them, the campaign terminates. Recipients who opened mailing D but did not generate a conversion receive the first reminder mailing. This mailing, with subject line E, contains content from the principal mailings in a different order or with a different focus. Recipients who have not yet opened any mailings are disregarded from this point on.
7. After a week, recipients who did not open the first reminder receive a second reminder. This mailing is identical to the first, but contains another version of the subject line with a call-to-action. The campaign then terminates.



Transactional mails

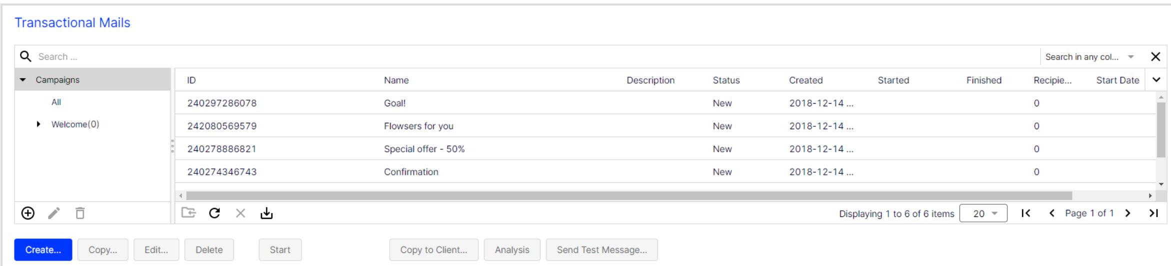
Transactional mails are sent automatically as a result of actions or events. There are two scenarios for transactional mails:

- **API mails**. Result from an API call, such as placing an order from the web shop. For this type of transactional mail, you need the REST API, SOAP API or HTTP API.
- **Campaign mails**. Used in a Marketing Automation campaign. While editing the Send message node, select the appropriate transactional mail in the Marketing Automation function.

When started, transactional mails remain in **Sending** status. Transactional mails are sent in real-time via the Optimizely Campaign transaction API.

Transactional mails overview

To open the transactional mails overview, open the Optimizely Campaign menu and select **Campaigns** > **Transactional Mails**.



In the transactional mail overview, you can find information about all created transactional mails, such as media type, name, ID and creation date. You can also view the current status of each transactional mail:

The transactional mail overview displays the status of each transactional mail.

- **New**. Fully configured but not started.
- **Incomplete**. Elements are missing or necessary parameters are not defined. Complete the configuration then start the transactional mail.
- **Sending**. Active and sending mails.
- **Canceled**. Sending was canceled and cannot be restarted.

Transactional mail actions

> **Note:** Some actions are not for new or incomplete transactional mails.

- **Create**. Create new transactional mails. See Creating transactional mails.
- **Copy**. Copy a transactional mail. Elements (recipients, target groups, messages, and so on) are applied.
- **Edit**. Edit a transactional mail as described under Creating transactional mails.

- **Delete**. Delete a transactional mail. You can delete only new or incomplete transactional mails.
- **Start**. Select a transactional mail and click **Start**. Confirm the start by clicking **Start Mailing**.
- **Copy to Client**. Copy transactional mails to other clients. Recipient lists and target groups are not transferred to the target client.

  > **Note: Prerequisites**
  >
  > - The registered user has permission to create mailings in the target client.
  > - The target clients have the same template used in the transactional mail that you want to copy.

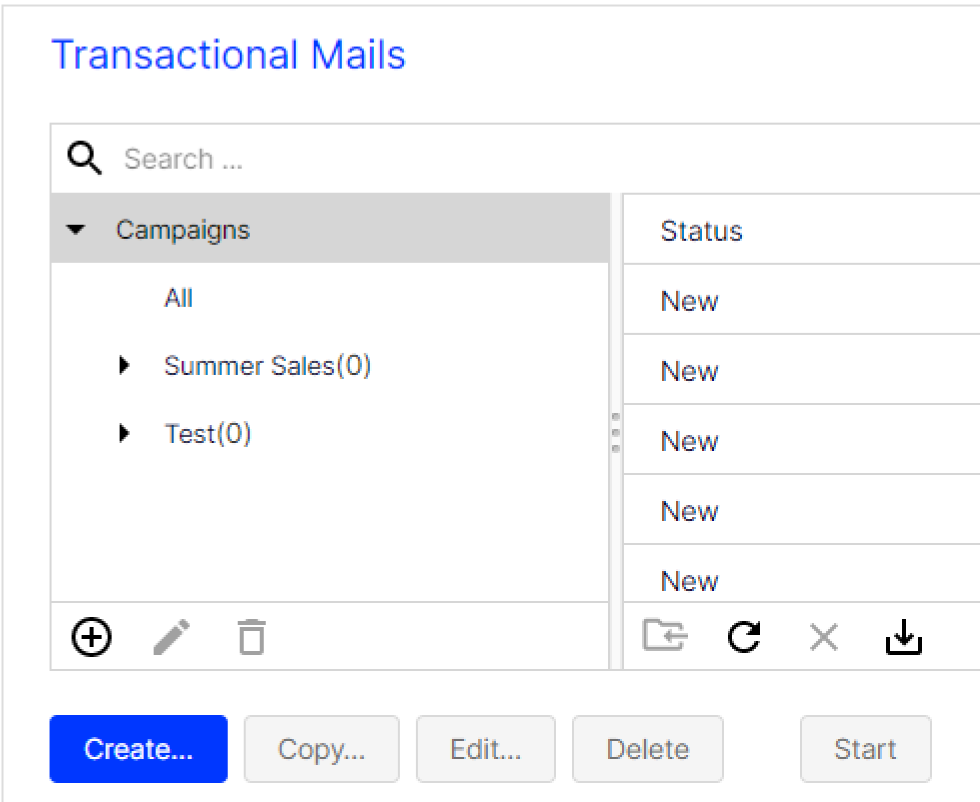
  1. In the campaign overview, select a transactional mail and click **Copy to Client…**. The **Copy Transactional Mail to Client** window opens.
  2. In the **Transactional Mail** area, in the **New Transactional Mail Name in the Target Client** field, enter the name for the copy of the transactional mail in the target client.
  3. In the **Target Clients** area, select clients in which you want to copy the transactional mail.

     > **Tip:** To select all available target clients, check the box in the menu bar.

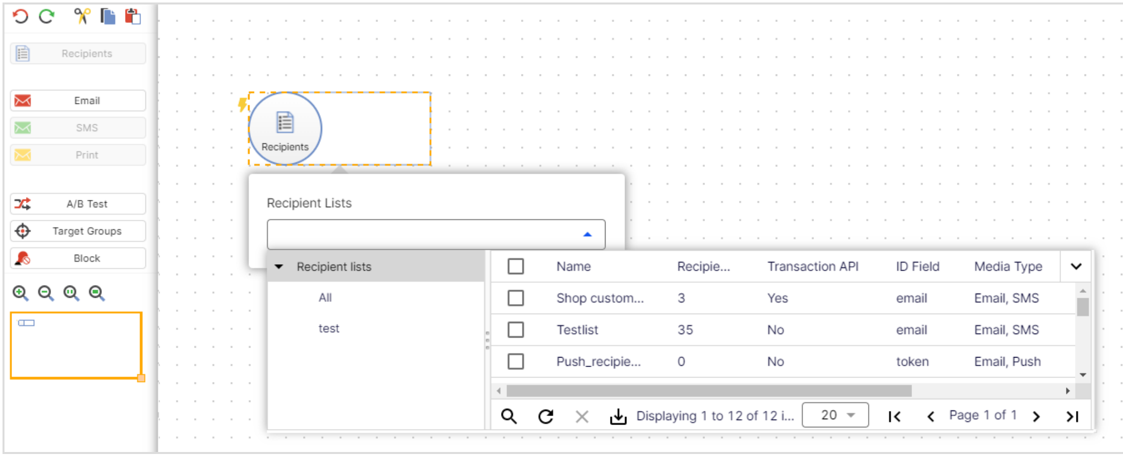
  4. Click **Copy**.
- **Analysis**. Select an active transactional mail (in **Sending** status) and click **Analysis** to check how many mails were already sent via an ongoing transactional mail. You can also see additional parameters such as opens, clicks, bounces, or unsubscribers.
- **Send Test Message**. Send a test message to check the appearance of the mailing before the actual dispatch. See Test email.

Creating transactional mails

1. In the transactional mails overview, click **Create...**.



2. From the left action pane, drag the **Recipients** node into the workspace.
3. In the **Recipient lists** drop-down list in the context menu, select your transaction recipient list.



> **Note:** Customer support has set up a separate transaction recipient list for you. Make sure you use this transaction recipient list, instead of a regular recipient list. To see if a recipient list is a transactional recipient list, check the column **Transaction API**.

4. Optional: From the left sidebar, drag the **Block** node into the workspace. Click **Properties** and select one or more custom blocklists from the drop-down list. The recipients on those blocklists do not get a message.

> **Note:** The **Block** node only works with custom blocklists and is only available for the email media type.

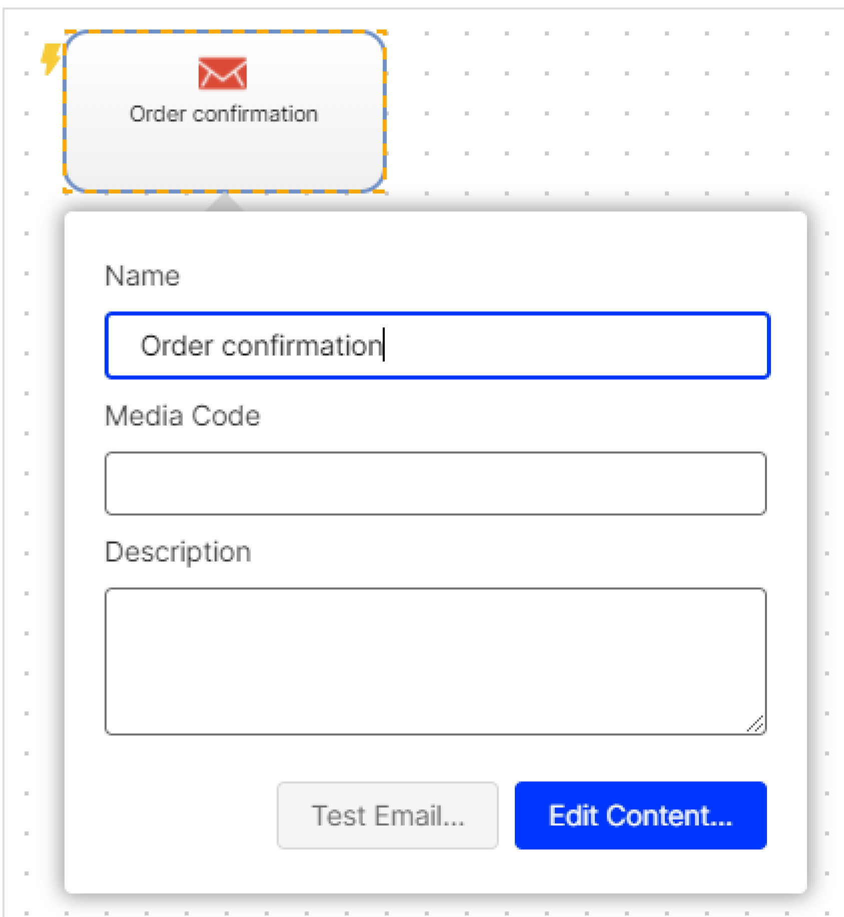
5. From the left sidebar, drag the message node for the desired media type into the workspace. The marketing channel must be compatible with recipient list type.

   You can select the following marketing channels for transactional mails:

Marketing channel	Delivers	Required recipient list type
Mail	email	**Mail** or multiple list
SMS	SMS	**SMS** or multiple list

Marketing channel	Delivers	Required recipient list type
Mobile Push	push message to a mobile device	**Push** or multiple list
Web Push	push message that appears in the recipient's web browser	**Push** or multiple list

6. In the **Name** box in the context menu, enter a name for your transactional mail (for example *Order confirmation*).



7. In the context menu for the message node, click **Edit Content...**.

8. In the **Template** list, select the desired template and confirm your selection by clicking **Next**.
9. Configure the template for the transactional mail according to your requirements. For more information, see Editing mailing content.
10. Click **Apply**.
11. Click **Close**.
12. Connect the **Recipients** node with the message node.
13. Click **Save and Close**.

> **Tip:** To run A/B tests to send different variants of a transactional mail and check which variant performs better, see A/B tests for transactional mails.

Setting up the List-Help header

This topic describes how to switch from the List-Unsubscribe header to the List-Help header for transactional mails.

List-Unsubscribe header

Currently, every email you send via Optimizely Campaign contains a List-Unsubscribe header. This is an unsubscribe link that can be executed via the email header. Some ISPs such as Gmail or Microsoft additionally display an unsubscribe button based on this header in the inbox overview, from which the recipients can simply unsubscribe with one click without having to open the mailing. The normal unsubscribe link in the mailing footer is a separate feature and is not related to the List-Unsubscribe header.

Example List-Unsubscribe header

```
List-Unsubscribe: <mailto:listoff-1234567-ABCDEFG-123ABCD@y-
our.domain.com?subject=unsubscribe>,<https://your.domain.com/gu/0/1234567-
ABCDEFG-7654321-GFEDCBA-00.html
List-Unsubscribe-Post: List-Unsubscribe=One-Click>
```

© Optimizely 2022

List-Help header for transactional mails

However, the List-Unsubscribe header does not make sense in every mailing, e.g., in non-list-based emails such as activation emails, order confirmations or password reset emails. The List-Help header may be used instead for ad-free, transactional mails. It is also part of the email header, but instead of an unsubscribe link it contains a URL to a website that explains to the recipients why they have received this mailing, how they can unsubscribe or why unsubscribing from it is neither possible nor necessary.

An unsubscribe button is not displayed. There is also the option of adding a contact email address in the List-Help header area, which is optional. The use of the List-Help header is compliant with CSA guidelines and industry best practices.

Example List-Help header

```
List-Help: <https://your.domain.com/unsubscribe.html>,<mailto: unsub-
scribe@your.domain.com>
```

Requirements

To switch from List-Unsubscribe header to List-Help header, note the following requirements for the mailing in which this is to be used, as well as for the List-Help URL itself:

Mailing requirements

- The implementation is only possible for mailings of type "transactional mail" or "confirmation mail".
- In terms of content, the mailings must contain transactional content triggered by the recipient, e.g., activation emails, order confirmations, invoices or password reset emails.
- The mailing must not contain any advertising content. This includes product advertising, newsletter advertising, advertising for the online shop, vouchers and all measures aimed at a (further) purchase. Company branding can be used.

List-Help URL/website requirements

- The List-Help URL must lead to an active website via HTTPS, HTTP is not sufficient.
- The website must contain the information as to why the recipient received the mailing.

- The website must contain information on how to unsubscribe from further emails or why unsubscribing is neither possible nor necessary.

Setup

To switch from the List-Unsubscribe header to the List-Help header, contact customer support.

Provide customer support with the following information:

- Reason for request
- Name / ID of the Optimizely Campaign client
- Name / ID of the mailing
- List-Help URL

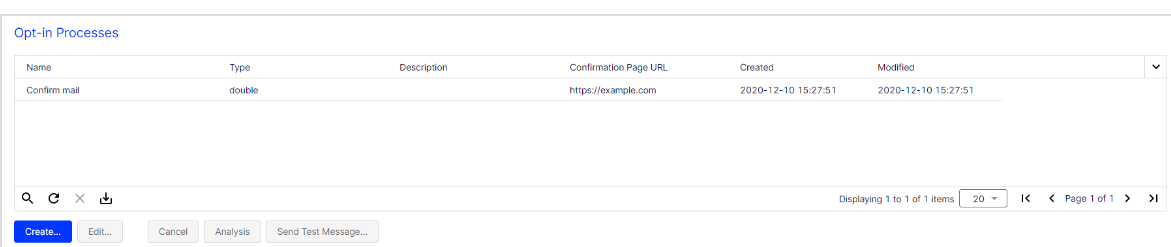
Opt-in processes

This topic describes how to create and manage opt-in processes and registration confirmations (opt-in emails). Opt-in emails are necessary to obtain permission from recipients to send them advertising mailings.

Opt-in emails are sent in real-time via the Optimizely Campaign transaction API (application programming interface) when a recipient registers for your newsletter. For more information on the opt-in method, see Opt-in.

Opt-in process overview

To open the opt-in process overview, open the Optimizely Campaign menu and select **Campaigns** > **Opt-in Processes**.



In the opt-in process overview, you can find information about all created opt-in processes, such as ID, name, type and confirmation page URL. You can also view the current status of each opt-in process:

- **Sending**. Active opt-in processes. Opt-in emails are sent. Newly created opt-in processes start automatically and are in **Sending** status.
- **Canceled**. Inactive opt-in processes. No opt-in emails are sent.

Opt-in process actions

- **Create...**. Create new opt-in processes. See Creating opt-in processes.
- **Edit...**. Edit an opt-in process as described under Creating opt-in processes.
- **Start**. Start a previously canceled opt-in process. The opt-in process must be in **Canceled** status.

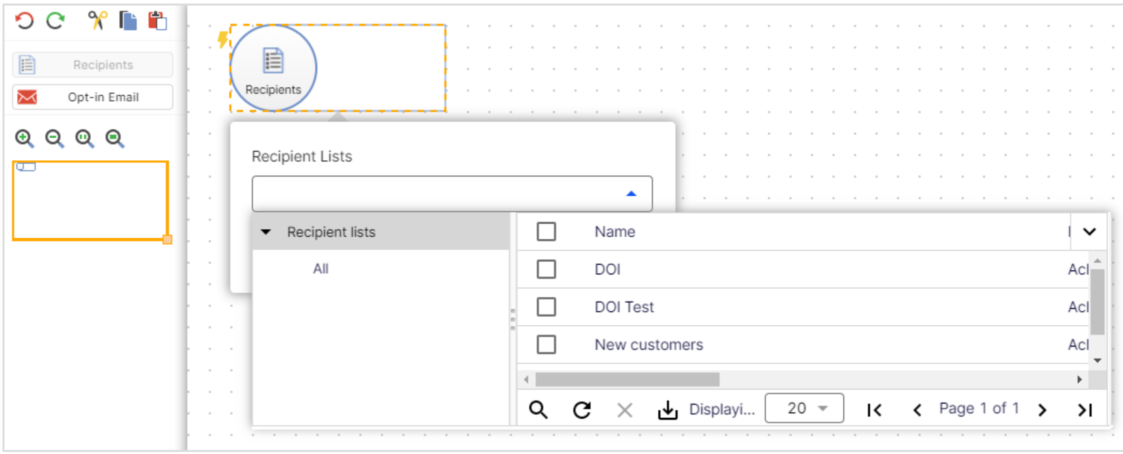
  > **Tip:** You can view the opt-in process status in the **Status** column of the opt-in process overview.

- **Cancel**. Cancel an active opt-in process. The opt-in process must be in **Sending** status.
- **Analysis**. Check how many opt-in emails were sent. You can also see additional information such as openings, clicks, bounces or unsubscribers.
- **Send Test Message...**. Send a test message to check the appearance of the mailing before the actual dispatch. See Test message.

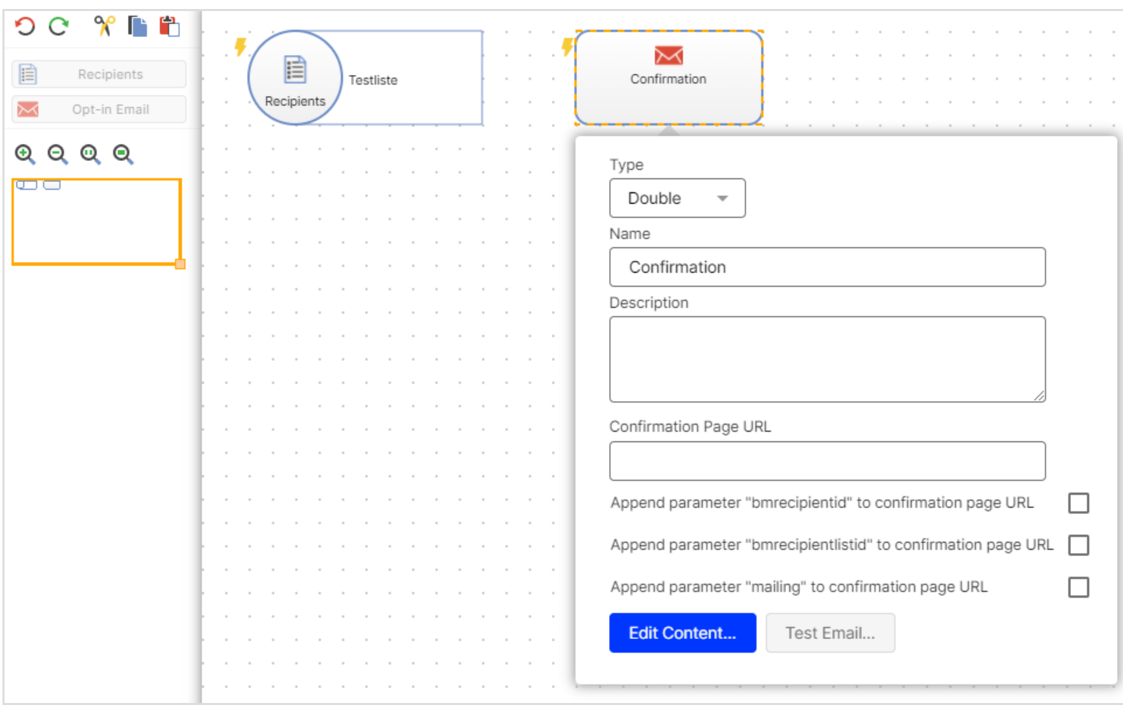
Creating opt-in processes

1. In the opt-in process overview, click **Create...**.
2. Drag the **Recipients** node from the left action area to the working area on the right.
3. Select one or more recipient lists.

   > **Note:** You can only use recipient lists of the **Opt-in** type.



4. Drag the **Opt-in Email** message node from the left action area to the working area on the right.
5. Configure the opt-in process.



- **Type**. In the drop-down list, select the opt-in type. **Double** is selected by default.

  > **Tip:** For information on the different opt-in methods, see Opt-in.

- **Name**. Enter a name for the opt-in process.
- **Description**. Optional: Enter a description for the opt-in process.
- **Confirmation Page URL**. Enter the URL of the confirmation page.

  > **Note:** The confirmation page URL is required for opt-in processes of the **Double** type.

  - Optional: You can append the parameters **bmrecipientid**, **bmrecipientlistid** and **mailing** to the confirmation page URL and use them for tracking and analysis. To do this, select the respective check box.

6. Edit the opt-in email by clicking **Edit Content…**. See Editing mailing content.

   > **Note:** Opt-in emails for double opt-in processes must contain a double opt-in link. Insert the `{Double Opt-in Link}` field function into the mailing text or add it to the HTML code, for example `<p>To confirm your newsletter subscription, click the following link: <a href="{Double Opt-in Link}">Confirm subscription</a><p>`.

7. Connect the nodes.
8. Click **Save and Close**.

> **Tip:** Newly created opt-in processes start automatically and are in **Sending** status. If you want to cancel a running opt-in process, select it in the opt-in process overview and click **Cancel**.

© Optimizely 2022

Message templates

Use message templates to create messages for sending via Smart Campaigns as well as transactional mails and skip the configuration steps.

You can create message templates and configure these by yourself with sender information, recipient lists, and other parameters. You can create a new message template by using an existing message template, directly via HTML code or by using an existing message as basis.

To open the template overview, open the Optimizely Campaign menu and select **Campaigns** > **Message Templates**.

Actions

- Create
- Copy
- Edit
- Delete

Create

1. To create a new message template, click **Create...**.
2. From the drop-down list, select an option.
   - **New**. Create a new message template based on a free-text template or another message template. Click **New** in the left column, then select a message template from the list on the right.

     > **Note:** The selected message template must support the targeted marketing channel, for example email.

   - **Message**. Apply content from an existing message to this message template. Click **Message** in the left column then select a message from the list on the right.

> **Tip:** Messages you created with Mailings Classic are also available.

- **Message template**. Apply the content and configuration of an existing message template. Click **Message template** in the left column, then select the template from the right.

3. Click **Next** to edit the message template.

Copy

1. To create a new message template and apply the content and configuration from an existing message template, click a message template in the list that has parameters that you want to apply.
2. Click **Copy…**. The message content appears on the screen.
3. Modify as needed the click **Save**.

Edit

To edit an existing message template, click a message template in the list, then **Edit…**.

> **Note:** If you save the message template under a different name after editing, the message template is renamed when you save it. No automatic copy is created.

Delete

To delete a message template, click a message template in the list, then **Delete**.

Configuring message templates

A message template usually contains sender information, a personalized subject line and other parameters such as character sets that can be reused. For information how to configure messages, see Configuring the message.

For information how to add content to the message template that you want to reuse in messages (for example, header and disclaimer), see:

- **Email message templates**. See Edit mailing content.

A/B test

With an A/B test, you can test a mailing in different variants on a small portion of the recipient list before you start the actual dispatch. The variant that performs best in the criteria you defined is then optionally sent to the remaining recipients.

The variants (split mailings) usually differ only in few parameters from another. The most common variations include:

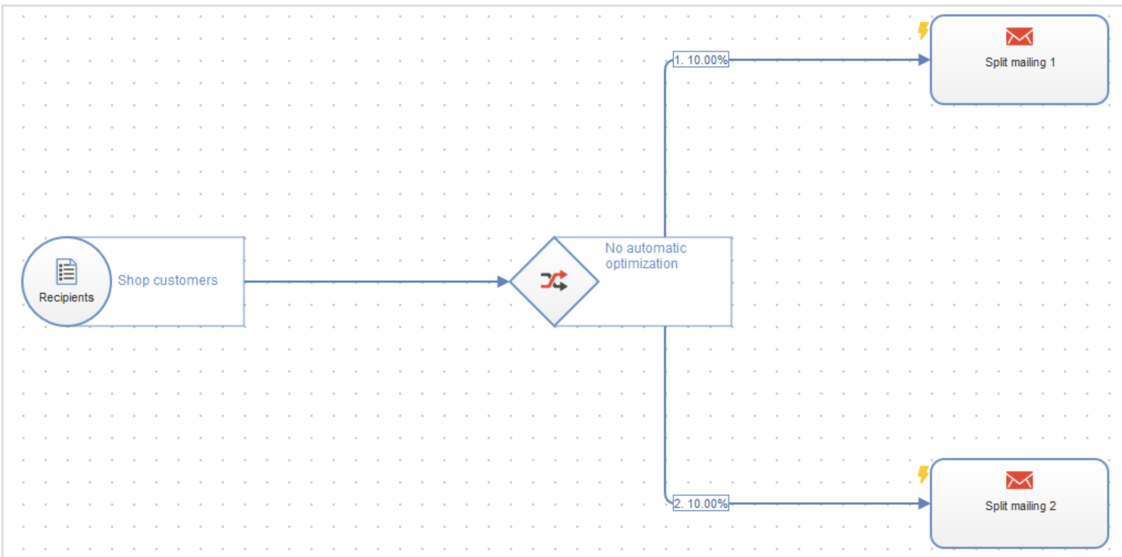
- **Subject line**. Test how different subject lines affect the opening rate.
- **Header image, title, intro paragraph**. Test various headers, titles and introductory paragraphs.
- **Target group-specific testing**. Test a mailing or a mailing variant to different target groups (for example, male and female recipients).
- **Time of dispatch**. Test the optimal time to send the master mailing.

A/B test in Smart Campaigns

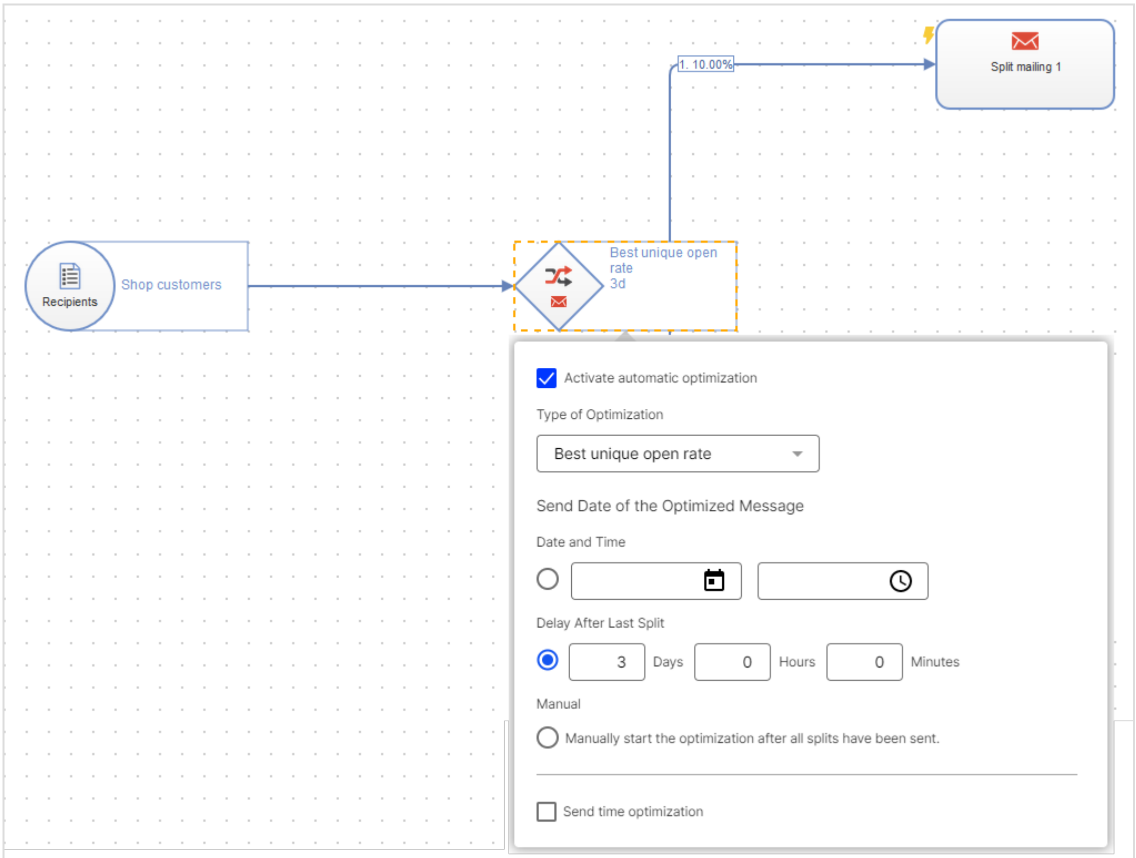
To perform a A/B test in Smart Campaigns, do the following:

1. Open the Optimizely Campaign menu and select **Campaigns** > **Smart Campaigns**.
2. Click **Create…**
3. From the left action pane, drag the **Recipients** node into the workspace and select one or more recipient lists.
4. Drag an A/B Test node from the left action area and drop it onto the desktop.
5. Connect the **Recipients** node to the **A/B Test** node.
6. Drag a message node (Email or Mobile Push) onto the desktop. Create a new message or edit an existing message.

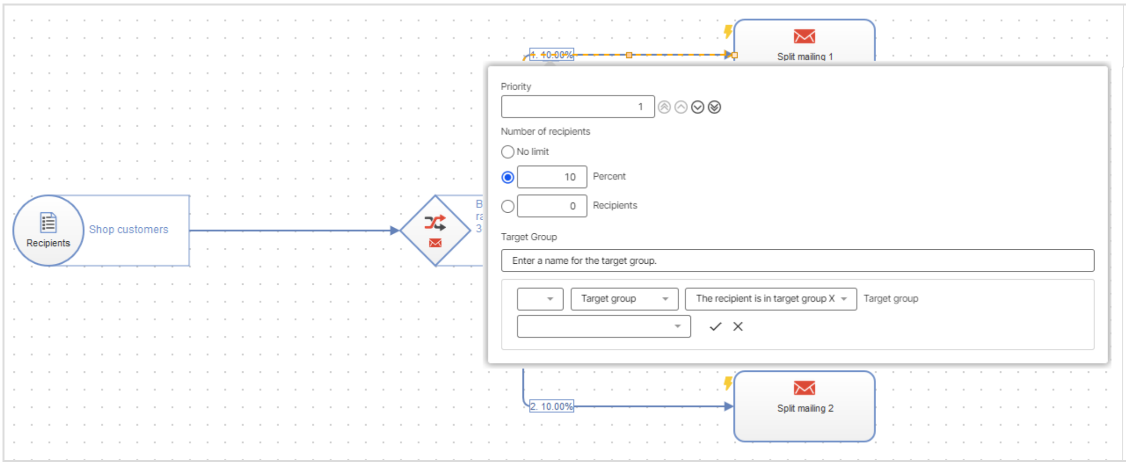
7. Drag another message node of the same type onto the desktop. Select the message that you used for the first message node and change the content according to the criteria that you want to test.
8. Add further message nodes if necessary and follow the description in point 7.
9. Connect each message node to the **A/B Test** node.



10. In the **A/B Test** node, optionally activate **Activate automatic optimization** and/or **Send time optimization**. For example, you can configure that the mailing with the best unique opening rate is automatically sent to the rest of the recipient list two days after the dispatch of the split mailings. For more information, see A/B Test node and Configuring send time optimization in the A/B Test node.



11. In the **Edit** menu of the respective connection, you can set, among other things, how many recipients should receive the split mailing. For example, if you select 10% for two split mailings, the mailing will be sent to the remaining 80% of the recipient list after the A/B test has been completed. For more information, see A/B Test node.



12. Click **Save and Close**. After the successful validation, you can activate the A/B test campaign.

A/B test for transactional mails

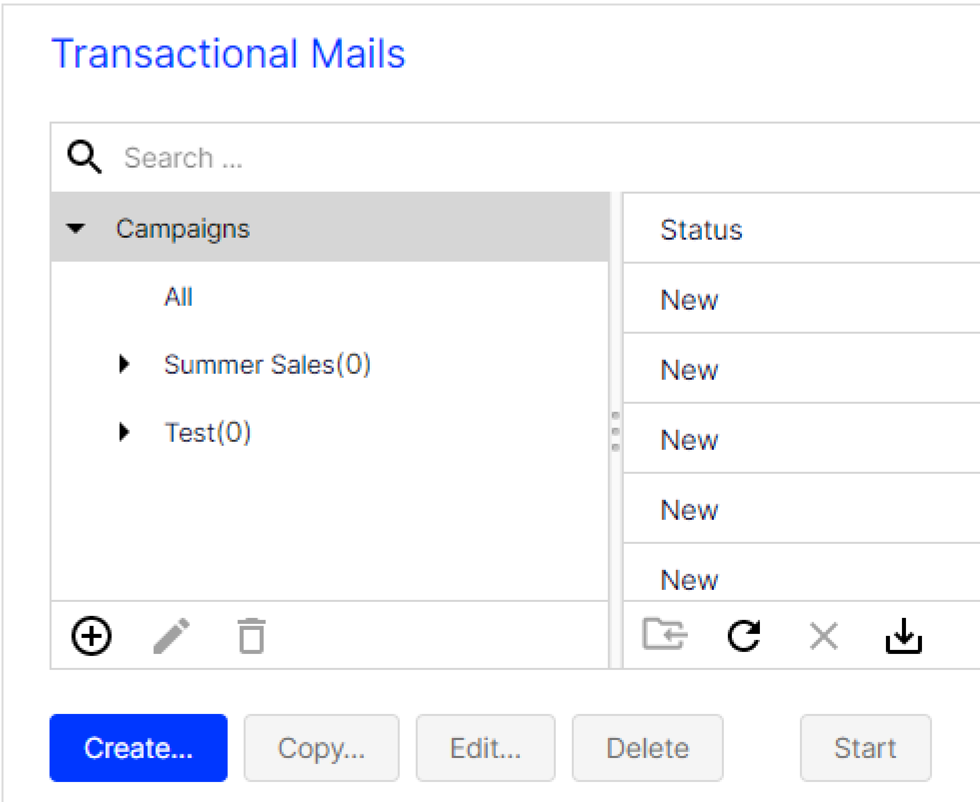
> **Note:** To enable this feature, contact customer support.

With an A/B test, you can send different variants of a transactional mail and use the key figures to determine which variant performs better. To evaluate the mailing key figures, for example, you can use the Deep Analytics analysis tool.

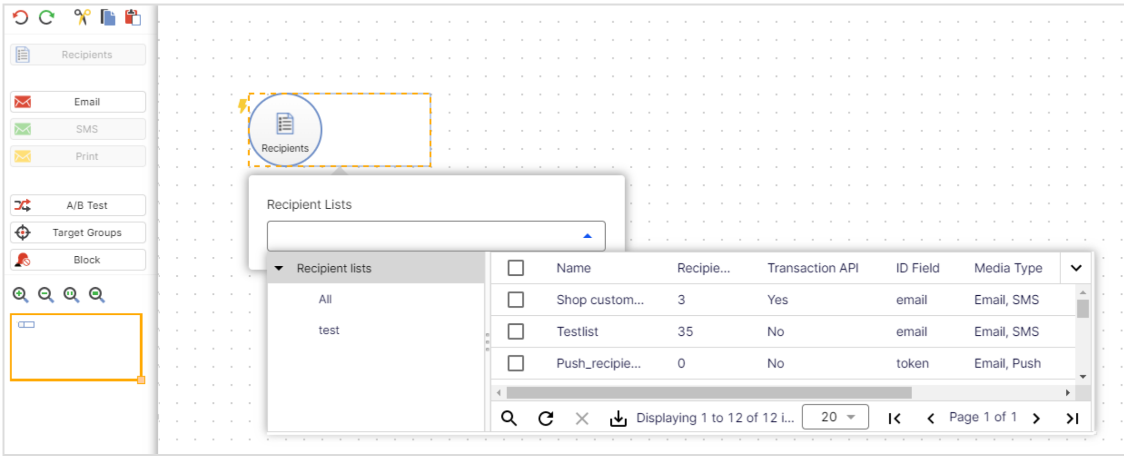
> **Note:** You *cannot* use transactional mails from A/B tests in Marketing Automation.

To create an A/B test with transactional mails, do the following:

1. Open the Optimizely Campaign menu and select **Campaigns** > **Transactional Mails**.
2. Click **Create...**.



3. From the left action pane, drag the **Recipients** node into the workspace.
4. In the **Recipient Lists** drop-down list in the context menu, select a transaction recipient list.



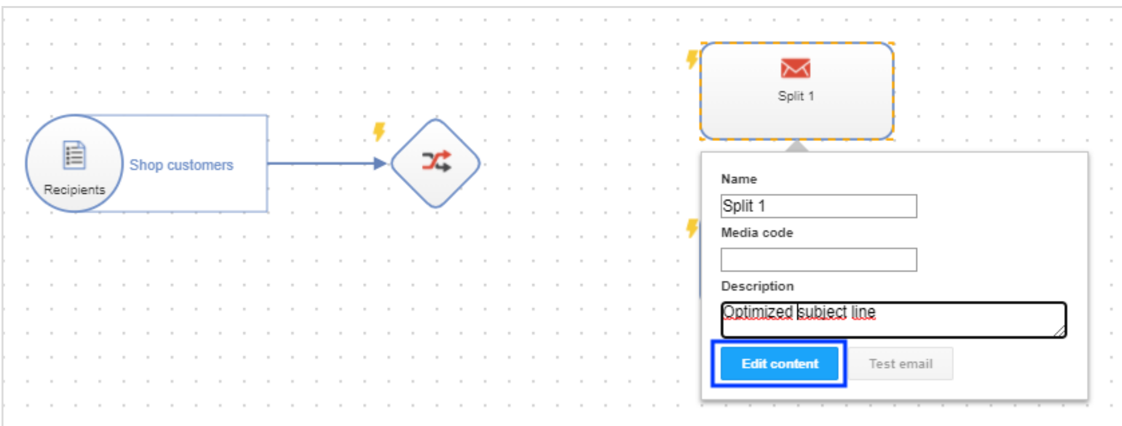
> **Note:** Customer support has set up a separate transaction recipient list for you. Make sure you use this transaction recipient list, instead of a regular recipient list. To see if a recipient list is a transactional recipient list, check the column **Transaction API**.

5. From the left sidebar, drag the **A/B Test** node into the workspace.
6. Connect the **Recipients** node with the **A/B Test** node.
7. From the left sidebar, drag at least two message nodes for the desired media type into the workspace. The marketing channel must be compatible with recipient list type.

   You can select the following marketing channels for A/B tests with transactional mails:

Marketing channel	Delivers	Required recipient list type
Mail	email	**Mail** or multiple list
SMS	SMS	**SMS** or multiple list
Mobile Push	push message to a mobile device	**Push** or multiple list
Web Push	push message that appears in the recipient's web browser	**Push** or multiple list

8. In the **Name** box in the context menu, enter a name for the transactional mail (for example *Split 1*).
9. In the **Description** box, optionally enter a description for the transactional mail (for example *Optimized subject line*).
10. Click **Edit Content...** and configure the message as described in Selecting the content type and Editing mailing content.



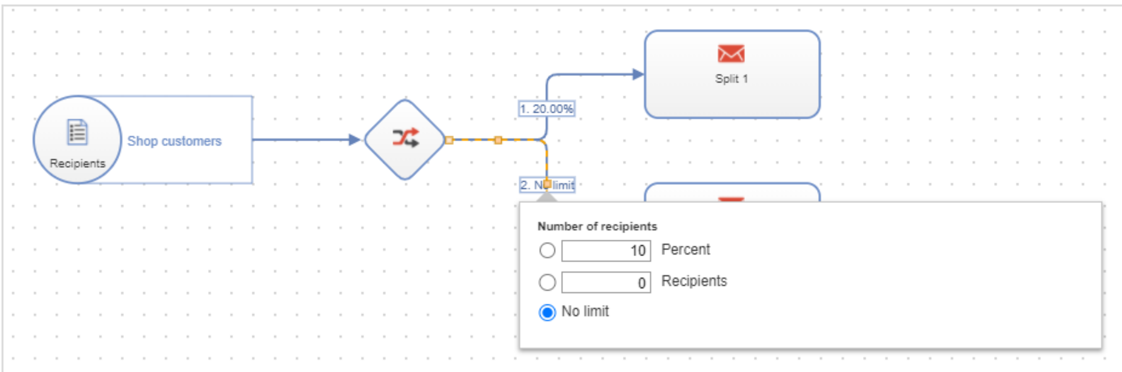
11. Connect the **A/B Test** node with the message nodes.
12. Click **Properties**  on the outgoing connections.
13. Specify to how many recipients the split mailing is to be sent.
    - **Percent**. Enter the percentage of recipients who should receive the split mailing.

      Note: The sum of the percentages in all outgoing connections must be 100 percent.

    - **Recipients**. Enter the number of recipients who should receive the split mailing.
    - **No limit**. Select this option if you do not want to limit the number of recipients.

      Note: You can select this option only for one outgoing connection.

> **Tip:** For example, if you enter *20%* in the first split mailing and select **No limit** in the second split mailing, the second split mailing will be sent to the remaining 80% of recipients.



14. Click **Save and Close**.
15. To activate your transactional mails and start the sending process, select the mailing in the transactional mail overview and click **Start**.

> **Tip:** To configure reports on each split mailing in Deep Analytics or to create target groups for segmentation, select the *Transactional message* mailing type.

A/B test in Mailings Classic

A split mailing in Mailings Classic is a variation of a regular mailing where a subset of recipients is "split off". You can edit every split mailing like a regular mailing and can also have a completely different look to the master mailing.

> **Note:** A split mailing is associated with a master mailing, even if the master is moved to another folder.

To create split mailings in Mailings Classic, do the following:

1. In the **Mailings** window, select the desired mailing – which is called the master mailing – and click **Split**. The **Split Dispatch** window opens.
2. You have two options.
   - Click **Add split (master mailing)** to create an exact copy of the master mailing with the same content. Edit this mailing by changing content elements, subject line, and so on.
   - Click **Add split (new mailing)** to create a new mailing with no content. Add the desired content as described in Mailings-Classic.

   In the **Splits** area, you can see the new split and existing splits of the selected master mailing. You can edit some parameters in the **Split** section of the **Split Dispatch** window, including:

   - **Name**. This name is used internally. By default, the split receives the same name as the master mailing.
   - **Subject**. Enter your desired variation to test different subject lines against one another.
   - **Maximum number of recipients**. Specify the number of recipients whom the split should be sent (relative to master mailing recipients, in absolute numbers or a percentage).
   - **Target groups**. Select up to three target groups for the split. See Target groups.
   - **Sending date**. Set the dispatch date for each split. See Dispatch order.
3. Click **Save settings**. The split is displayed in the mailing list.

   In the list, splits appear indented below the master mailing they belong to. In the **Type** column, they are designated as **Split**.

Recipients

To perform an A/B test, during which the best option between split A and B is selected and sent out as master mailing, splits are typically sent to a subset of total recipients. Each split can be sent to an absolute number of recipients, or a percentage of total recipients. If percentage is selected, it is based on the number of master mailing recipients. This principle also applies if a split uses a recipient list other than the master mailing.

For selecting a subset of recipients from a recipient list:

- **Percentage**. Enter a percentage in the **Maximum recipients** field. The number of recipients is based on the total number of master mailing recipients.

  Or, enter an absolute value. If the split contains the corresponding number of recipients, it is sent to exactly that number.

- **Random**. Recipients are randomly selected from the list. If you do not use this option, emails are sent to split recipients according to their order on the list.

In both instances, recipients who receive one split email will not be sent another. Similarly, recipients who are on several lists only receive one email. Optimizely Campaign monitors email addresses during dispatch to ensure that each recipient only receives one email (split or master mailing).

Recipient lists

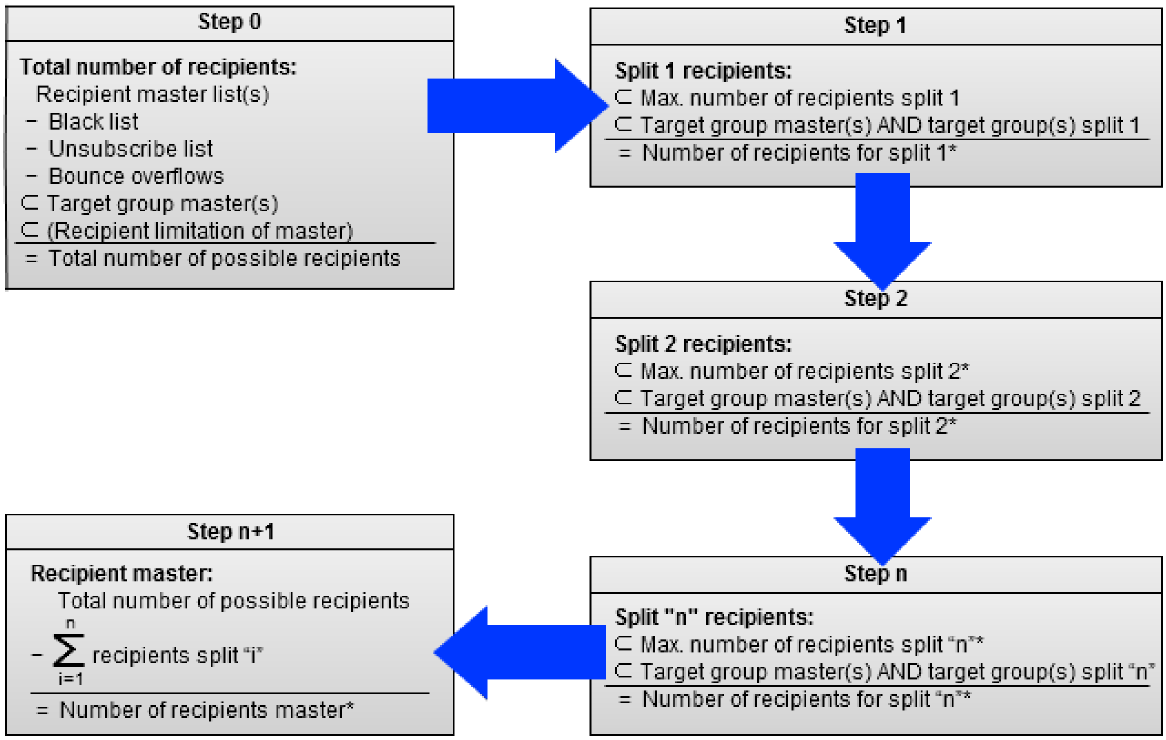
In most cases, the same recipient lists are used for the master mailing and splits. However, for a split, you can use a recipient list other than master mailing. The master mailing recipient list is the basis for calculating the number of split recipients.

To use different recipient lists for the master and split mailing, in the **Split Dispatch** window, select **off** from the **Automatically use the best split for the master mailing** drop-down list.

If you are using different recipient lists in combination with recipient data-based target groups, be aware of potential conflicts between the different recipient lists. See Target groups.

Calculating recipients

The total number of recipients (master mailing and splits) is calculated every time before a mailing – including individual splits – is sent. The following illustration shows how subsets of recipients and the total number of recipients are calculated during dispatch.



Recipient calculation

- The ⊂ symbol signifies that a subset of the total is being created.
- If a percentage is given for the number of split recipients, discrepancies between individual splits are possible, as cancellations and bounce overflows are taken into account for each case. This reduces the number of possible total recipients and the correspondingly calculated percentages.
- The number of possible recipients also considers the master mailing's target groups. If a target group with the recipient list of the master mailing contains fewer addresses than the same target group with the recipient list of the split, the number of recipients to be sent emails is the number calculated for the target group and recipient list of the master mailing.
- If the total recipient number is reached during the dispatch of a split, the subsequent splits and the master mailing are not be sent (see example 1 and example 2).

Target groups

Target groups used in the master mailing are inherited by the split mailings. You can add target groups to split mailings by linking with the target groups of the master mailing using AND logic.

The number of matches of a target group in the recipient list of the master mailing furthermore determines the maximum possible number of recipients for this target group. If the recipient list of a split contains more matching recipients for this target group, the total number of recipients sent an email will not exceed the number previously calculated on the basis of the target group and recipient list of the master mailing.

> **Note: Master mailing vs. split target groups**
>
> Avoid target groups in the main and split mailings that exclude each other (for example, *Male* and *Female*), because no recipients will be selected for the split.

Note that the creation of target groups using recipient-based criteria can only apply when the corresponding criteria is also defined as a list box. Furthermore, if using a different recipient list for the split than for the master mailing, ensure that it incorporates the same data structure as the master mailing list – or at least that the list boxes for the master mailing target group can also be found in the split. The description of the corresponding list boxes must be an exact match, including capitalization.

Example

If a target group is used in the master mailing with the criteria **Recipients with interest "Football"**, the recipient lists of both the master mailing and the split must contain a common corresponding field, such as **Interests**.

Dispatch

To send a split mailing in the **Split** window, click **Start Split** or select the check box below **Mailing schedule** and specify a dispatch date using the calendar.

Dispatch order

Set the order of splits in the lower section of the **Split Mailing** window via arrow keys to the right of each split. Splits associated with a master mailing are part of a hierarchy, which is determined by the order of the splits. This split hierarchy is referenced when calculating recipients of splits and the master mailing.

> **Note: Split hierarchy vs. sending order**
>
> When individual splits are *manually* started, the split hierarchy applies, without regard for dispatch order. For example, if the last split in a list is sent first, the recipients for the split and master mailings are calculated on the basis of the overall split hierarchy.
>
> Under certain circumstances, this may lead to a split being sent to fewer or even no recipients despite having started first. This is because the splits higher up on the list are allocated the complete number of recipients, and no recipients remain for the subordinate split. For more information, see Split mailing examples.
>
> If the split dispatch is started *automatically*, the split mailings are sent in the order of the split hierarchy.

Optimizing and sending the master mailing

An A/B test lets you analyze each split's performance and send the best performing variation as a master mailing.

Optimizely Campaign also offers an automatic optimization. To activate it, select one of the following criteria from the **Automatically use the best split for the master mailing** drop-down list. This criterion determines which split is chosen for the master mailing.

> **Note:** Which criterion you use depends on mailing type, the quality of recipient data, and your marketing goals.

- **Best unique open rate**. Split most opened by recipients (percentage).
- **Best unique click rate**. Split most clicked by recipients.
- **Best effective click rate**. Split with the best unique opens/unique clicks rate.
- **Lowest unique unsubscribe rate**. Split that created the fewest unsubscribes.
- **Highest turnover**. Split that created the highest revenue. This criterion only delivers valid results if post-click tracking was configured for your client; otherwise splits have the result `0`.
- **Lowest bounce rate**. Split that created the fewest bounces.

There are three options to start the master mailing.

- **Save mailing and start it manually later**. Start the master mailing manually by clearing the check boxes and selecting the default option when editing the mailing in the **Options** tab.
- **Sending date for the master mailing**. Set a sending date for the master mailing and select the check box to activate this option. Use this option if you usually send your newsletter at a certain day and time.
- **Sending delay for the master mailing after the last split mailing has been sent**. Set a delay between the sending of the last split mailing and the master mailing. Select the check box to activate this option.

> **Tip:** Use this option to get reliable opens and click rates based on the split mailings, because not all recipients open and click the mailing immediately upon receiving it.

Split mailing examples

The following examples to help you understand the split module by showing recipient calculations and their results. They illustrate the hierarchies and dependencies of the master mailing and splits.

In all examples, it is assumed that recipients are valid (that is, no one is blocked, has canceled, or exceeded the bounce limit).

Example 1

The master mailing and splits are sent to the same recipient list. A limit on the recipient number is set in the master mailing. The splits comprise A/B testing (split A against split B) with different target groups. The recipient list contains 100 recipients (40 male, 40 female, 20 unspecified).

Mailing	Recipient list	Max. number of recipients	Target group	Sent emails
Master mailing	A	28% (= 28 recipients)	—	0
Split 1	A	—	male	28
Split 2	A	—	female	0

Result: The total number of recipients, as defined in the master mailing, was reached during the dispatch of split 1. No emails are sent to Split 2 and the master mailing.

Example 2

Master mailing and splits are sent to different recipient lists. A limit for the total number of recipients is defined in the master mailing. Recipient list A (master mailing) contains 200 recipients (60 male, 60 female, 80 unspecified). Recipient list B (splits) contains 100 recipients (40 male, 40 female, 20 unspecified).

Mailing	Recipient list	Max. number of recipients	Target group	Sent emails
Master mailing	A	28% (= 56 recipients)	-	0
Split 1	B	—	male	40
Split 2	B	—	female	16

Result: The total number of recipients is determined by recipient list A and the limit of recipients defined in the master mailing. Split 1, only sent to male recipients with no send-

© Optimizely 2022

ing limit, is sent to male recipients in list A. Split 2 is subsequently sent to 16 female recipients from the same list. At this point, the total number of recipients limit is reached.

Example 3

The master mailing and splits are sent to the same recipient list. Recipient list A contains 100 recipients (20 male, 20 female, 60 unspecified). Three splits are created.

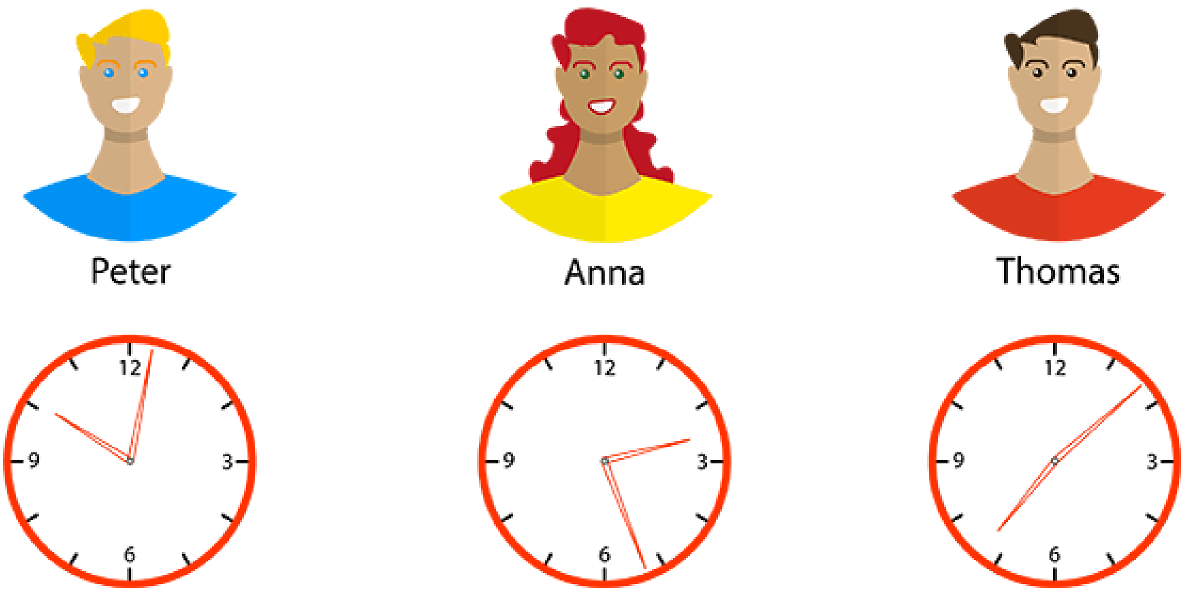
- Split 1 has the target group "male"
- Split 2 "female"
- Split 3 has the target group "male OR female" (so gender must be specified).

The master mailing does not define a target group. Split 3 is to be sent first.

Mailing	Recipient list	Max. number of recipients	Target group	Sent emails
Master mailing	A	—	—	60
Split 1	A	10%	female	10
Split 2	A	10%	male	10
Split 3	A	10%	unspecified	0

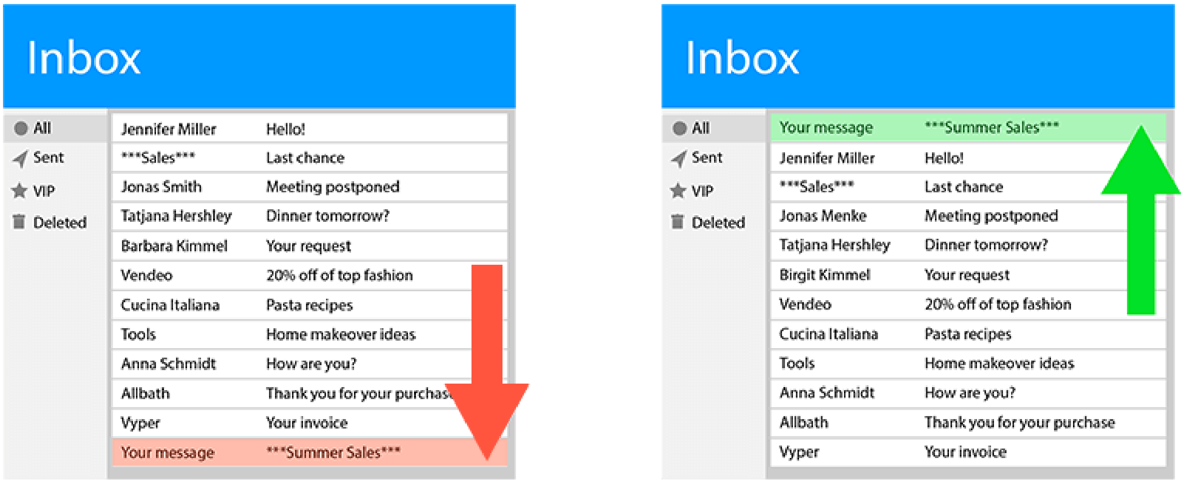
Result: While the first two target groups are subsets of the master mailing target group, the target group for split 3 and the master mailing exclude one another. To select recipients who did not specify gender, the target group of the master mailing should be "males OR females OR blank field".

Send time optimization



Send time optimization detects when recipients actually check their inbox, and sends your message to each individual at a time that matches the rhythms of their life. As a result, your email appears at the top of the inbox. Send time optimization ensures that your mailing is received during key, attention-grabbing minutes, and does not get lost at the bottom of the inbox with a bunch of other messages.

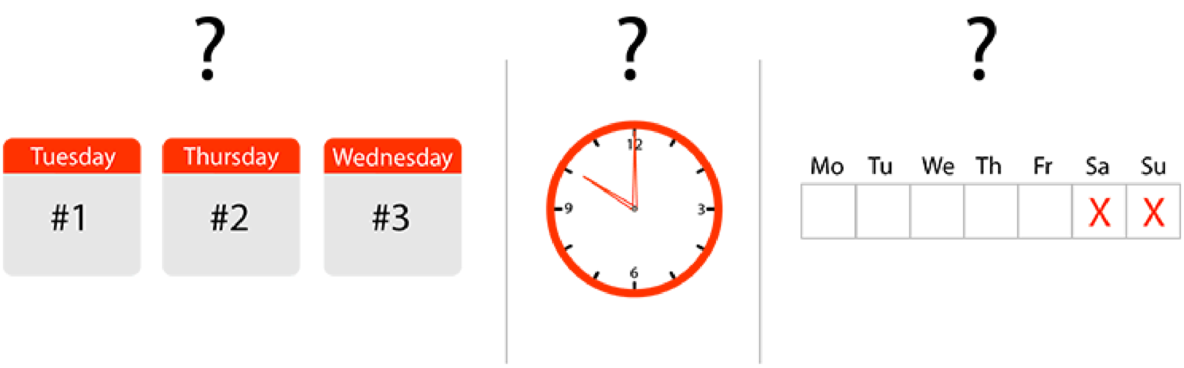
Send time optimization can increase the open rate for your messages by up to 25 percent. As a marketer, you benefit from the undivided attention of your recipients, which increases your return on investment.



Why should you automate optimization?

Many marketers follow three simple rules to determine the best send time for their campaigns, based on the findings of various studies.

- Tuesday is the best day to send out mailings. Thursdays and Wednesdays are the next best days (the response rate by recipients is the highest in most industries on these days).
- Around 10 AM is better than early morning, afternoon, or evening (recipient responses are the highest at this time for most industries).
- Workdays are better than weekends.



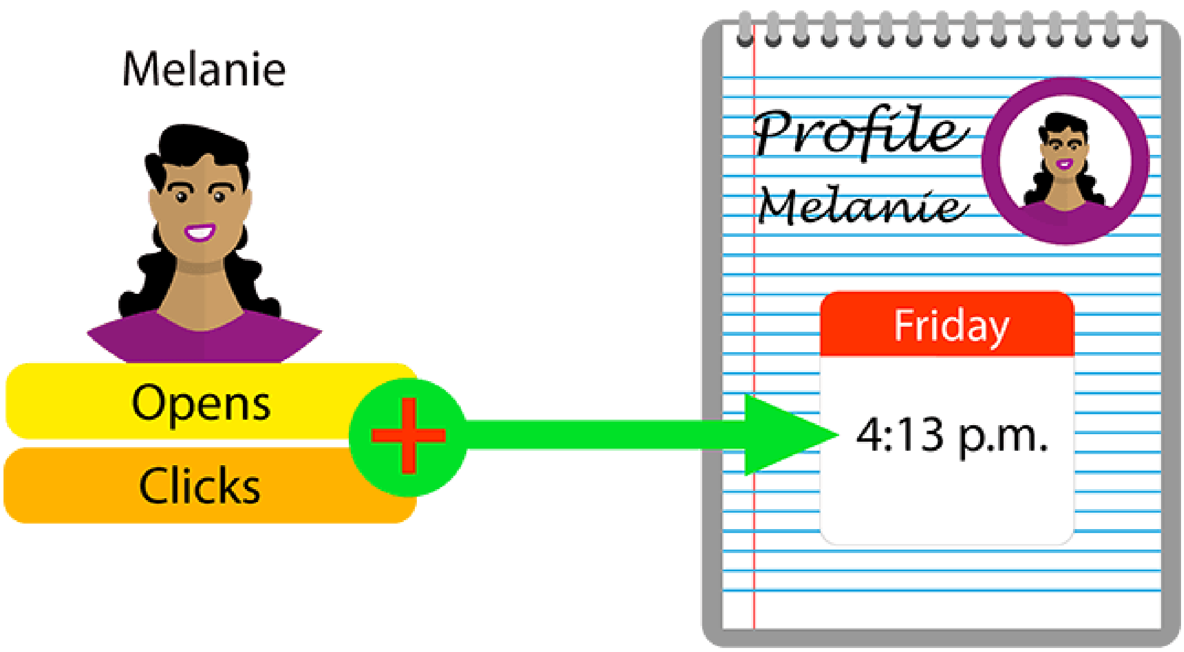
Although the rules are based on many studies and billions of data sets, they are derived from average values, and do not consider each recipient's preferences (and also do not apply to every industry). Do not rely on average values or the assumption that "one size fits all" – rather, learn about the particular lifestyles of your customers. Adjust your send times to accommodate the preferences of your recipients.

How it works

Send time optimization creates a personal profile for each recipient then analyzes their response behavior. Machine learning: The longer the customer relationship, the more accurate the optimized send time. And, if a recipient changes their behavior, their profile is updated accordingly.

The self-learning algorithm also analyzes click behavior and message opens, because opens by themselves do not provide sufficient evidence of whether a recipient is interacting with their inbox.

Around 70 percent of users now own a smart phone, and reach for it an average of 88 times a day to check their inbox or open a message, if only to reduce their unread message count to zero. When users check messages, they are much less likely to read emails in depth or to follow interesting links. Therefore, send time optimization considers the click behavior of recipients to determine when they are focused and responsive, not just clicking off a notification.



© Optimizely 2022

Benefits

- Increase the open rate for your emails by up to 25 percent.
- Decrease likelihood that your message will go unnoticed.
- Your advertising messages are perceived as less obtrusive.
- The service adjusts to the recipient's behavior, and changes the send time when a recipient changes habits.
- Send time optimization is automated.
- It has a low learning curve. The feature integrates with the familiar, standard features of Optimizely Campaign.
- Virtually infinitely adjustable for up to 7 days.
- A fallback time can be set for new recipients for whom behavioral data is not yet available.
- Available for Smart Campaigns (including A/B tests).
- Analysis function to evaluate individual send times.

Setting up time optimization

> **Note:** Send time optimization is available only for the **Email** channel.

To set up send time optimization, contact customer support. The feature as an extension:

- in the Wait node for Smart Campaigns
- in the A/B Test node for Smart Campaigns
- in the campaign analysis

Configuring send time optimization in the Wait node

This topic describes how to enable and configure the send time optimization in the **Wait** node within Smart Campaigns.

> **Note:** The send time optimization feature is available only for the **Email** channel.

Once configured, your message is sent to recipients with sufficient behavioral data at a personalized send time. Recipients who lack sufficient behavioral data receive your message at the fallback time.

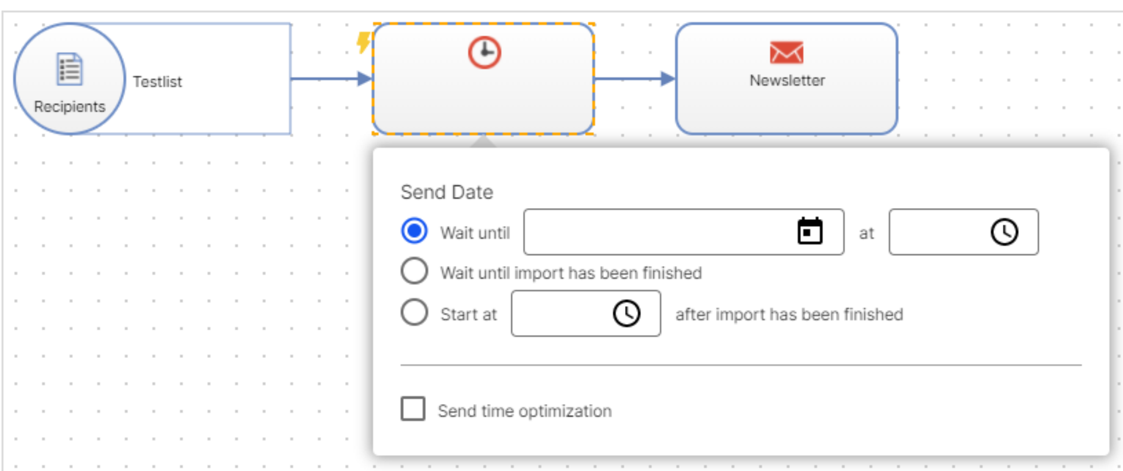
To configure send time optimization in the **Wait** node, do the following:

1. Under **Send Date**, specify a fallback.
2. Enable send time optimization.
3. Select the maximum length of time for the send time optimization.
4. Adjust the start and end times of the send time optimization and, if necessary, shorten the preset maximum length.
5. Check your settings in the info area.

Specifying a fallback time

If there is insufficient data about individual recipients to determine a personalized send time, your message is sent to these recipients at the set fallback time. To specify a fallback time, perform the following steps:

1. In the **Create Campaign** window or the **Edit Campaign** window within Smart Campaigns, drag a **Wait** node from the left action pane into the workspace between the **Recipients** node and the message node. A context menu opens.
2. Under **Send Date**, select an option and specify the fallback time.



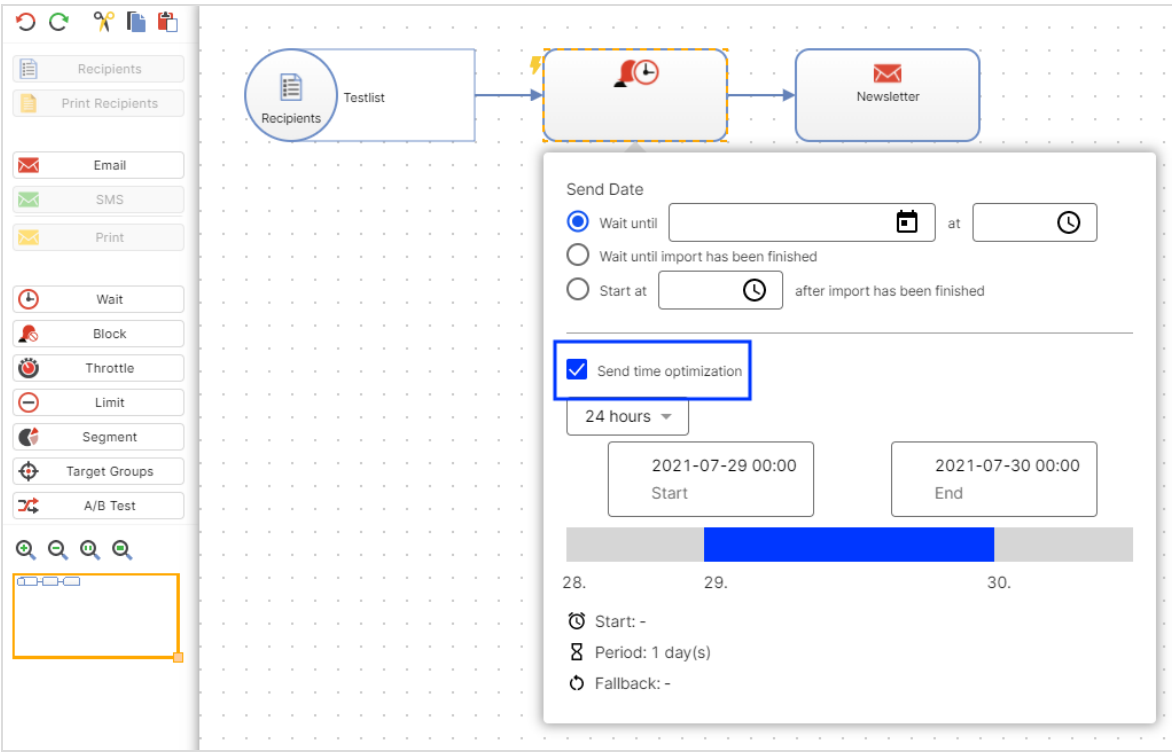
Option	The fallback time is set to	Configuration
Wait until ...	A fixed time.	Specify a date and a time.
Wait until import has been finished	Immediately after the recipient import is completed.	No configuration needed
Start at ... after import has been finished	A fixed time after the recipient import is completed.	Specify a time.

Note: The **Wait until import has been finished** and **Start at ... after import has been finished** options are only available if the closed-loop interface is configured in your client. If the closed-loop interface is not configured, only the **Wait until ...** option is available.

Warning: If the **Wait until import has been finished** or **Start at ... after import has been finished** option is selected, you cannot enable the campaign.

Enabling send time optimization

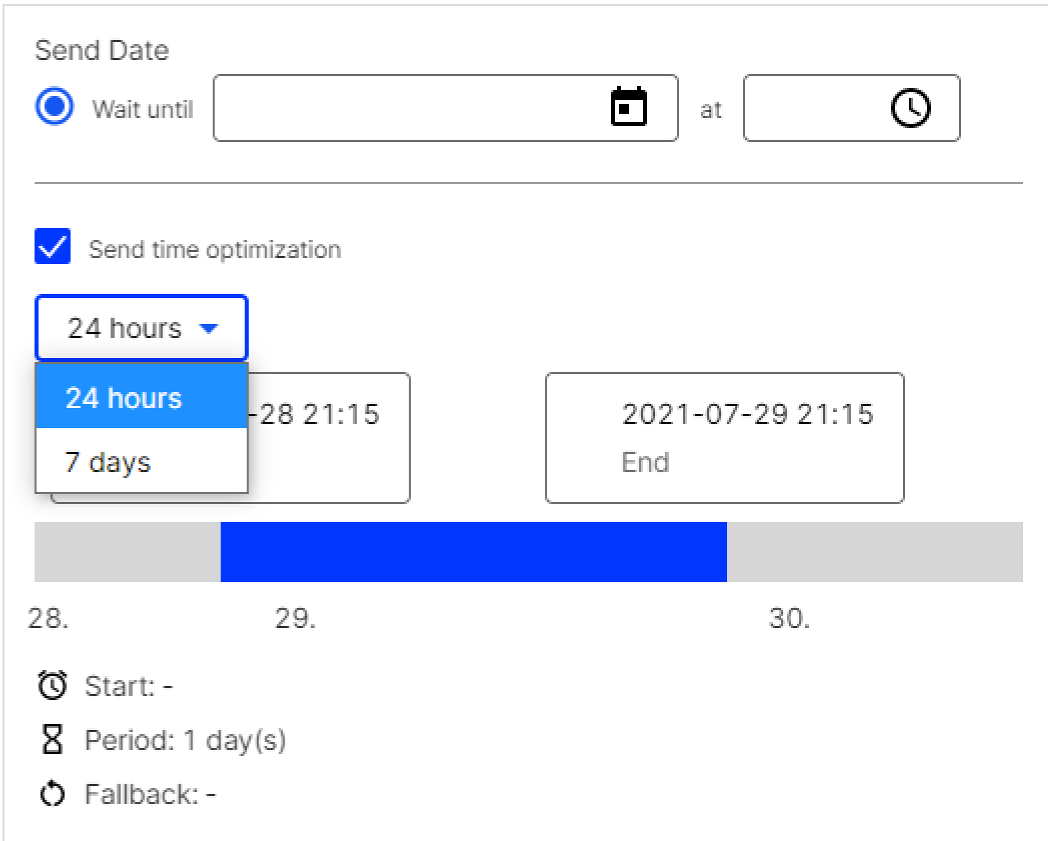
In the context menu of the **Wait** node, select the check box next to **Send time optimization**.



Specifying the maximum length of time

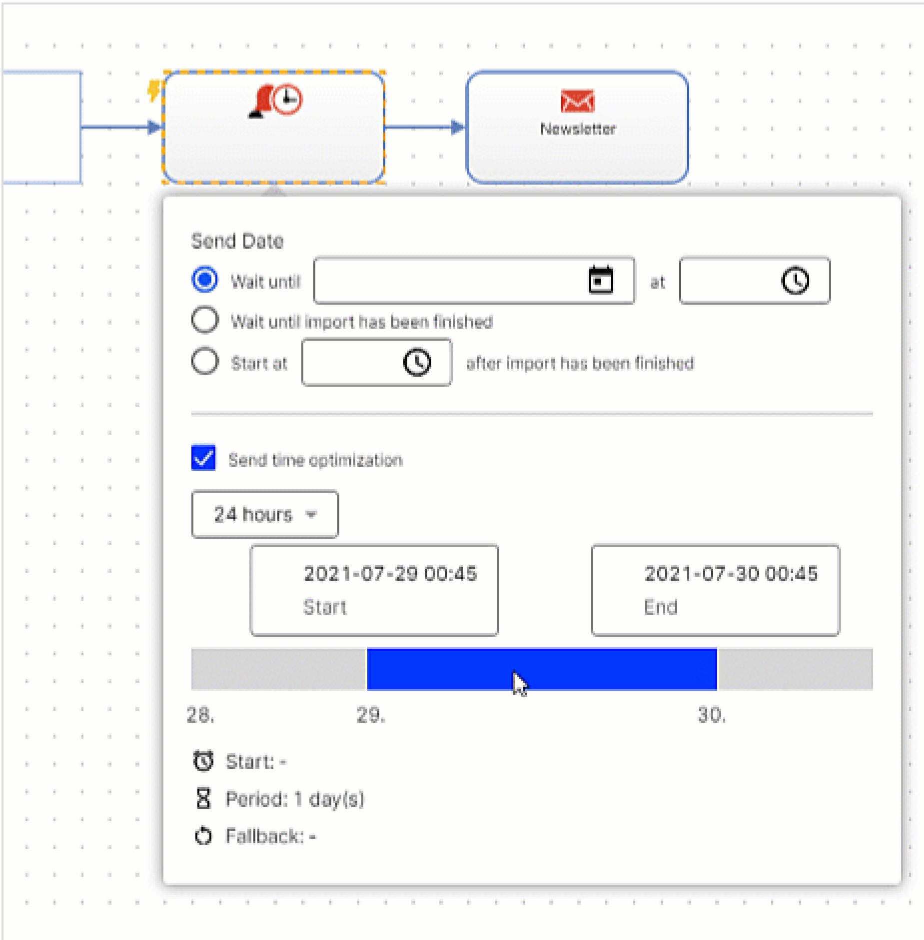
Set the maximum length of time that Optimizely Campaign can use to optimize the mailing dispatch.

You can select **24 hours** or **7 days**.

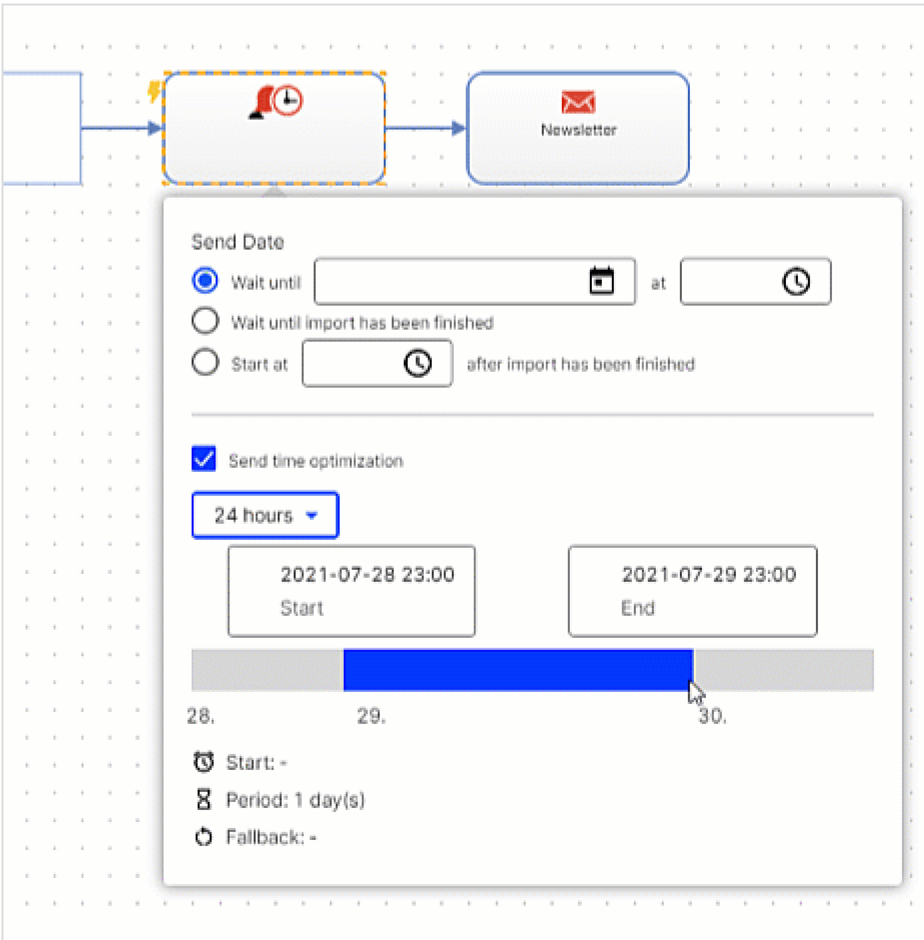


Adjusting start and end times

You can adjust the start and end times of the send time optimization in 15-minute increments by using the date slider. If you make no changes, the start and end times are set so that the fallback date is the midpoint of the selected maximum length of time.

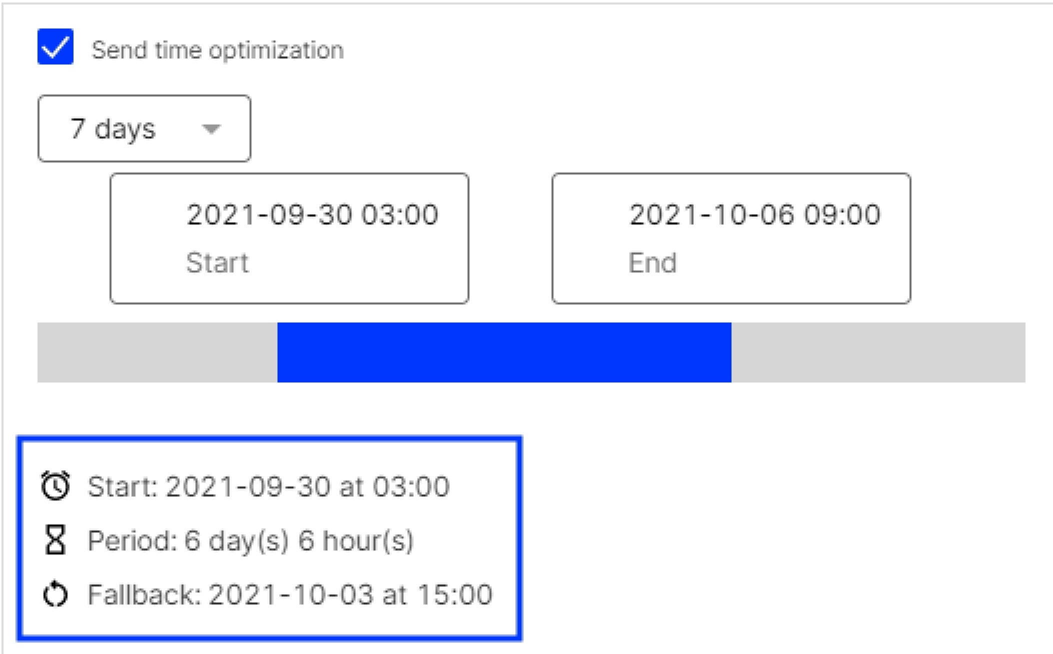


To adjust the start and end times and reduce the maximum length of time, click and grab the corresponding date tab with the computer mouse.



Checking settings in the info area

Your current send time optimization settings appear in the info area. After completing the configuration, verify your settings in the info area, and change them if necessary.



Configuring send time optimization in the A/B test node

This topic describes how to enable and configure the send time optimization in the **A/B Test** node within Smart Campaigns.

> **Note:** The send time optimization feature is available only for the **Email** channel.

Send time optimization in the **A/B Test** node is used only to determine the personalized send time of the **optimized message** (the *main mailing*). To optimize the time of sending of individual split mailings, use a separate **Wait** node for each split mailing and configure the send time optimization in the Wait node.

To configure send time optimization in the **A/B test** node, do the following:

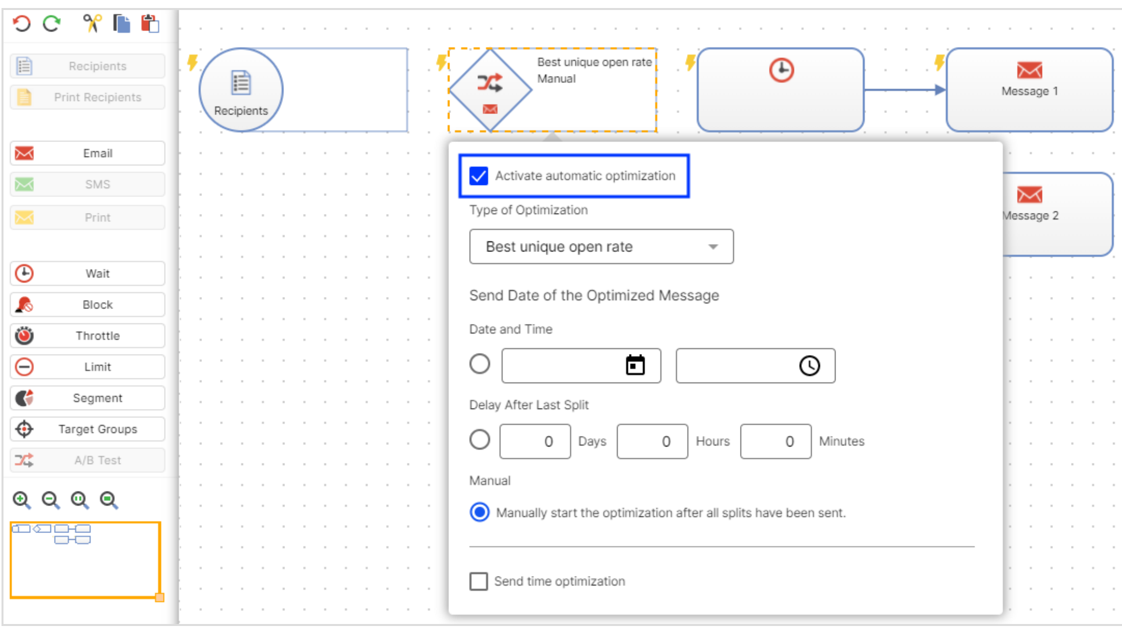
1. Under the **Send Date** specify a Fallback time.
2. Enable the send time optimization.
3. Select the maximum length of time for the send time optimization.

4. Adjust the start and end times of the send time optimization and, if necessary, shorten the preselected maximum length.
5. Check your settings in the info area.

Specifying a fallback time

If there is insufficient data about individual recipients to determine a personalized send time, your optimized message is sent to these recipients at the fallback time. To specify a fallback time:

1. In the **Create Campaign** window or the **Edit Campaign** window within Smart Campaigns, drag an **A/B Test** node from the left action pane to the workspace, between the **Recipients** node and the **Wait** node/ message node. A context menu opens.
2. To enable automatic optimization, select the check box next to **Activate automatic optimization**.



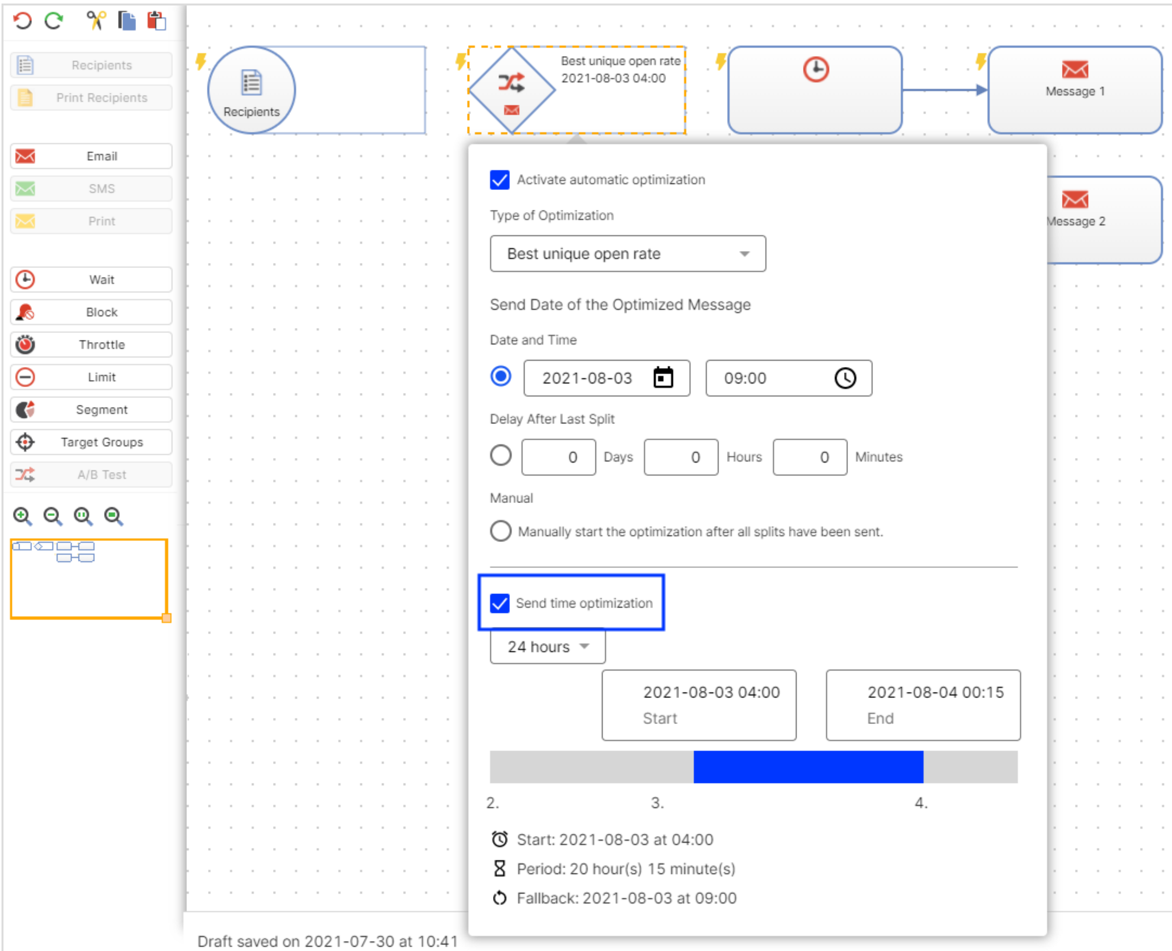
3. In the **Type of Optimization** drop-down list, select one of the following types:
   - Best effective click rate
   - Best unique click rate
   - Best unique open rate

   - Lowest unique unsubscribe rate
   - Lowest bounce rate
4. Under **Sending Date of the Optimized Message**, select an option and specify the fall-back time.

Option	The fallback time is set to	Configuration
Date and Time	A fixed time.	Specify a date and a time.
Delay After Last Split	Immediately after the delay.	Specify the delay time.
Manual	The manual start time.	No configuration step needed.

Enabling send time optimization

In the context menu of the **A/B Test** node, select the check box next to **Send time optimization**.

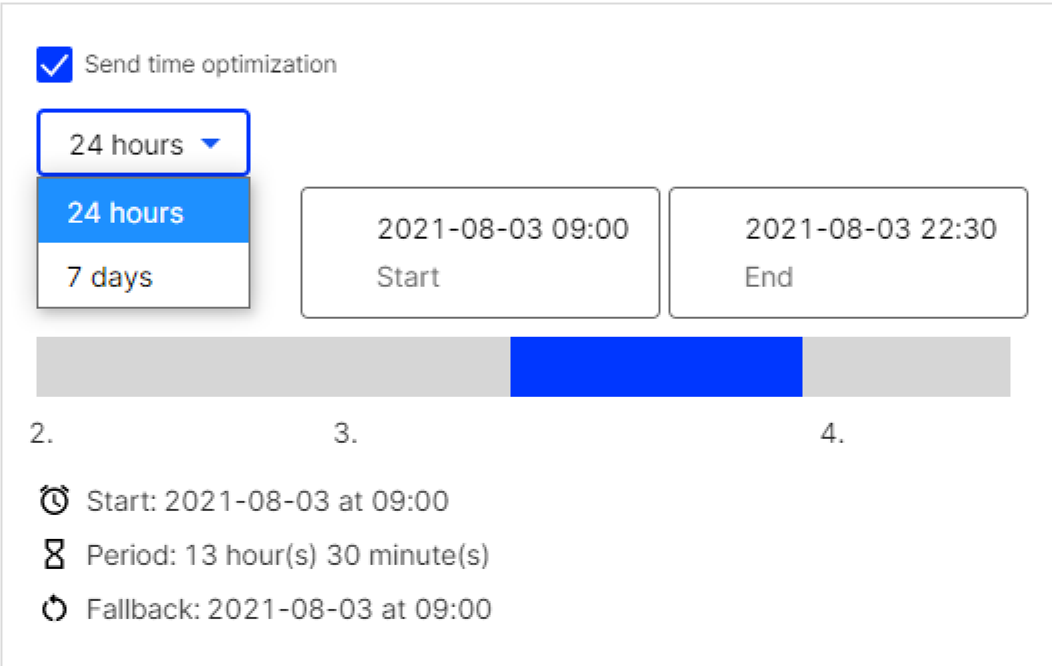


Setting maximum length of time

Set the maximum length of time that Optimizely Campaign can use to optimize the sending of optimized messages/main mailings.

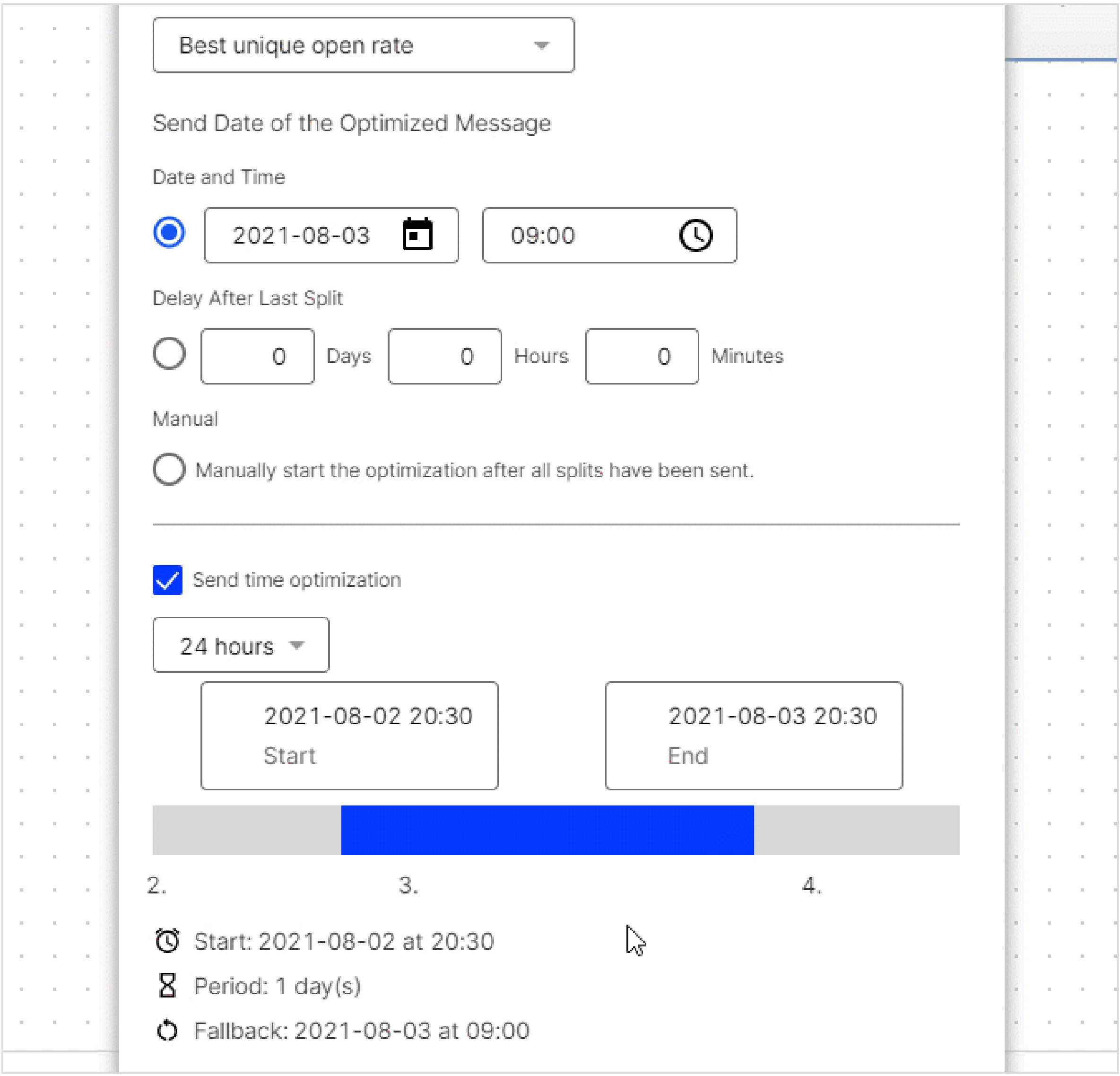
> **Tip:** This option is only available for the fallback **Date and Time**.

You can select **24 hours** or **7 days**.

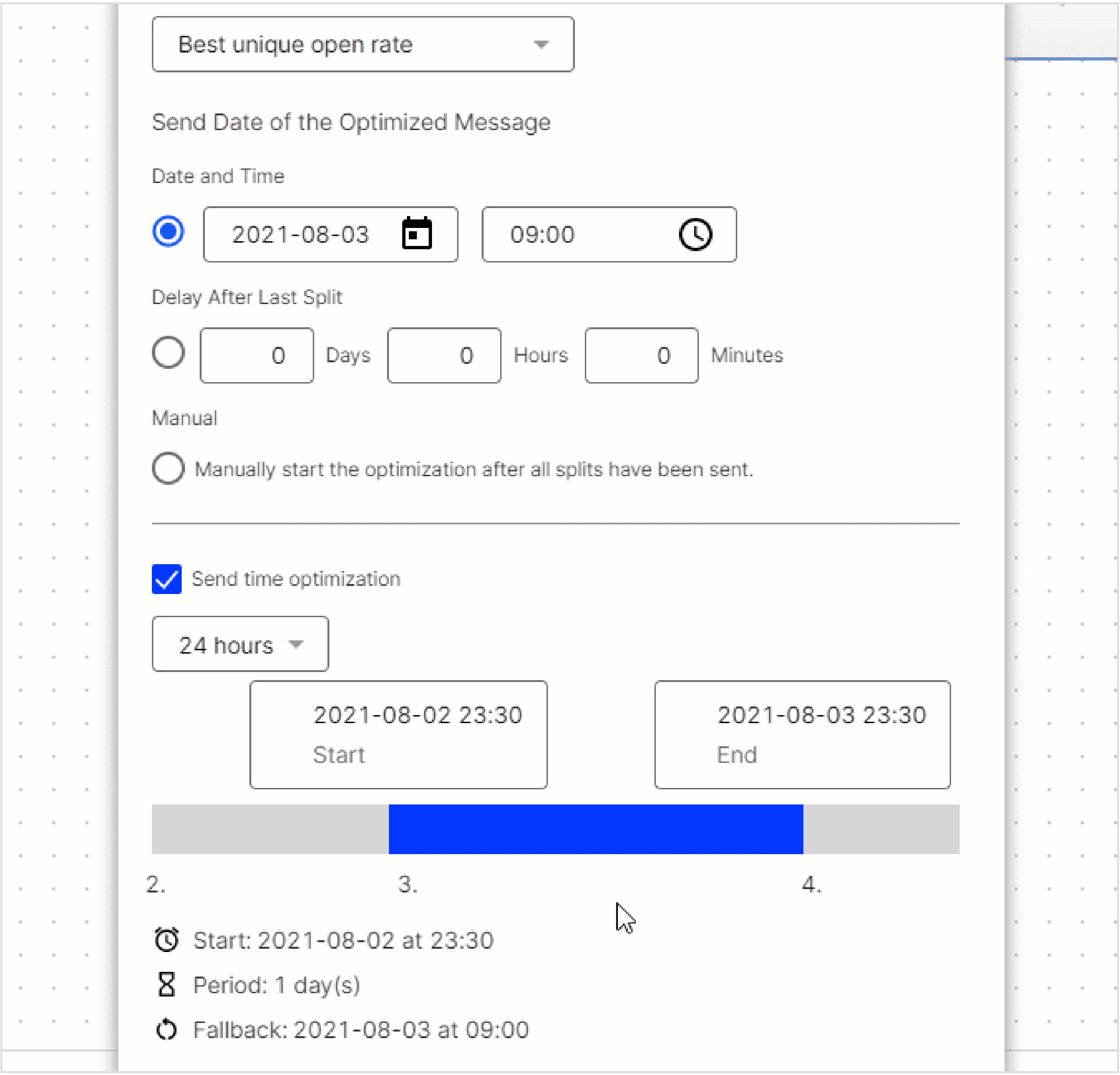


Adjusting start and end times

You can adjust the start and end times of the send time optimization in 15-minute increments by using the date slider. If you make no changes, the start and end times are set so that the fallback date is the midpoint of the selected maximum length of time.



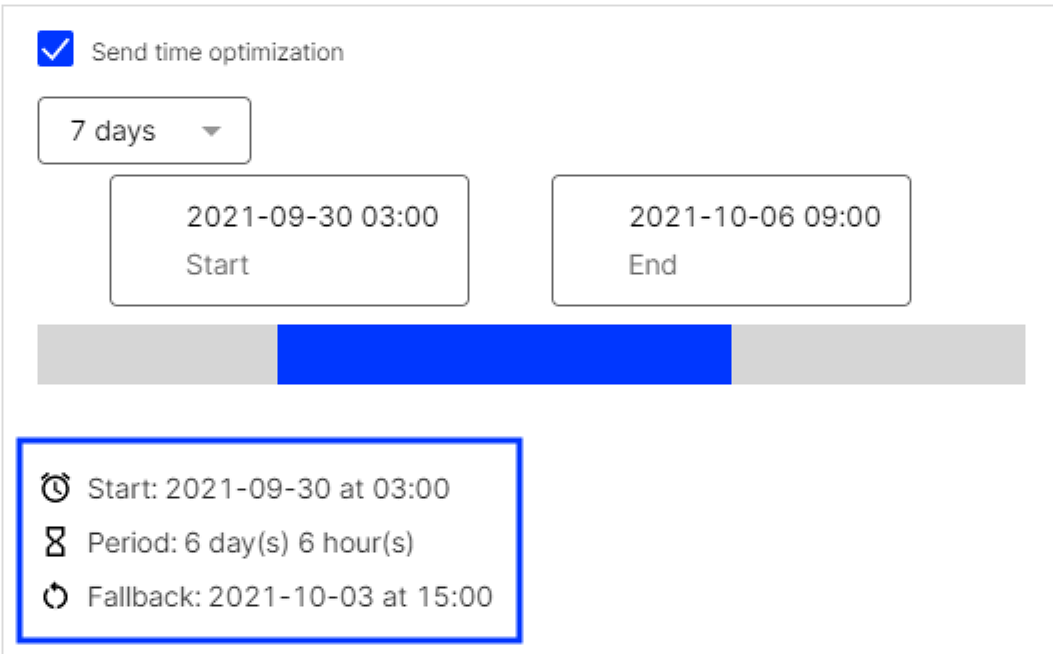
To adjust the start and end times and reduce the maximum length of time, click and grab the corresponding date tab with the computer mouse.



Tip: You can adjust the **24 hours** and **7 days** defaults downwards and shorten the maximum length of time from 7 days to 3 days. For example, for editorial purposes or short-term promotions.

Checking settings in the info area

Your current send time optimization settings appear in the info area. After completing the configuration, verify your settings in the info area, and change them if necessary.



A/B test node examples

You can configure send time optimization in one of three ways for an A/B test:

- **Only optimized message/main mailing**. To only configure the send time optimization for the optimized message or the main mailing, configure the send time optimization in the **A/B Test** node only.
- **Only split mailings**. If you want to send split mailings using a send time optimization, use a separate **Wait** node for each split mailing, and configure the send time optimization in each **Wait** node.
- **Split mailings and optimized message or main mailing**. If you want to configure a send time optimization for both split mailings and the optimized message or main mailing, configure the send time optimization in the **A/B Test** node and in the **Wait** node of the split mailing.

Tip: See also Smart Campaigns nodes and A/B test.

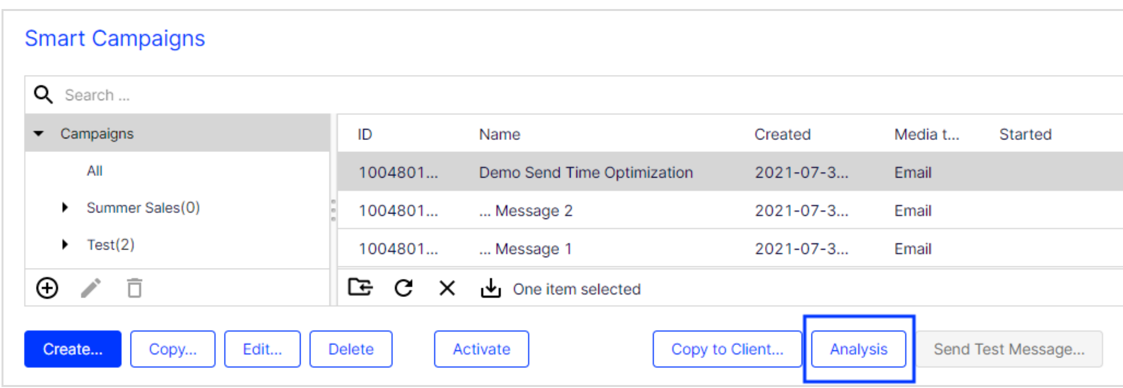
Analyzing mailing send times

If send time optimization is set up in your client, you will have access to the **Send time optimization Overview**, an additional analysis feature of Smart Campaigns.

The overview analyzes the distribution of mailing send times and peak send times. The overview also displays the number of recipients to whom your message is sent at the fall-back time because there was insufficient data to determine a personalized send time.

To generate and view the send time optimization overview, do the following:

1. Open the Optimizely Campaign menu and select **Campaigns** > **Smart Campaigns**.
2. Select a campaign and click **Analysis**.

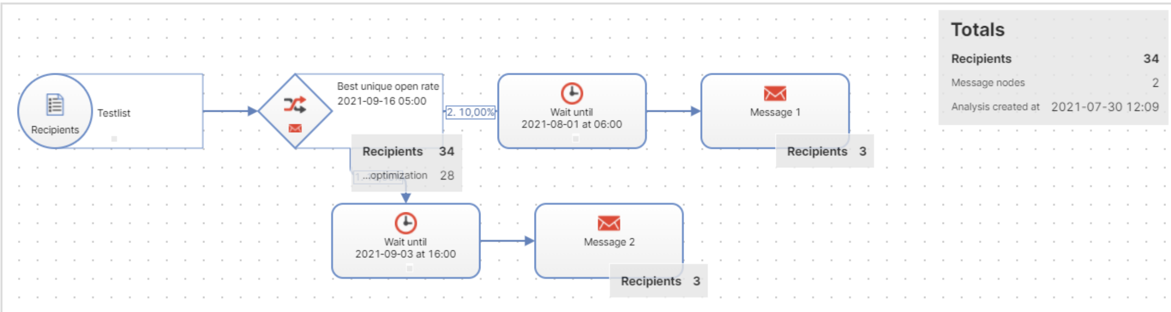


3. In the **Campaign analysis** window, click **New Analysis**. A new campaign analysis containing the **Send Time Optimization Overview** is created.

Note: It may take a few minutes to generate the analysis.

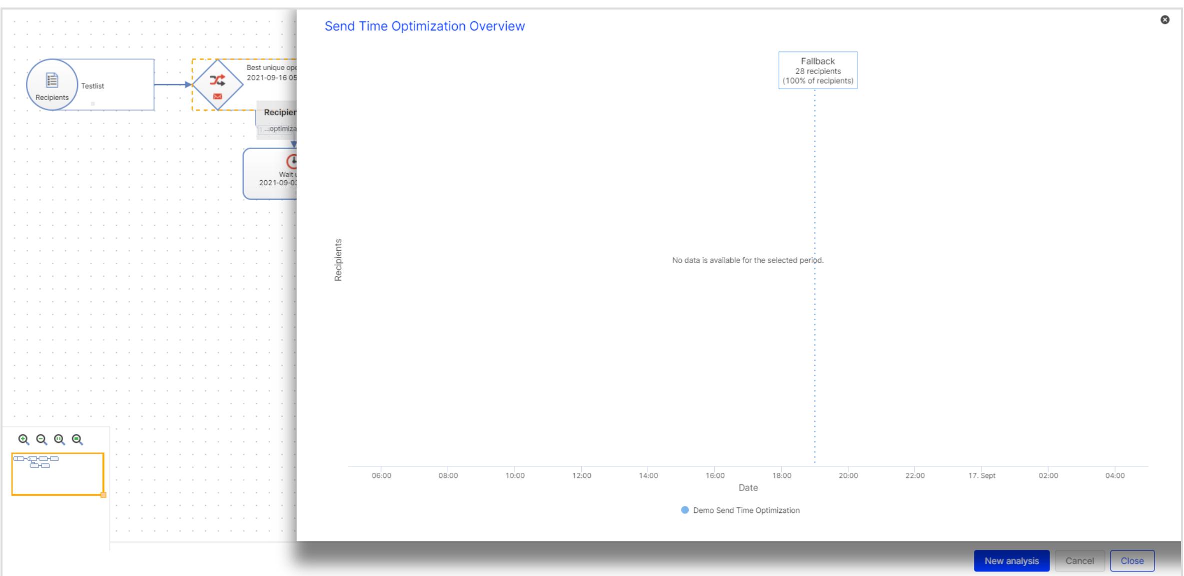
Send time optimization overview

In the **Campaign analysis** window, you can see context menus with data about recipients and the campaign nodes.



To view the send time optimization overview, click the corresponding **Wait** node or **A/B Test** node.

The **Send Time Optimization Overview** display the distribution of mailings, peak send times, and number of recipients to whom your message was sent at the fallback time.



In the **Send Time Optimization Overview**, you have the following options:

- **Zoom**. To zoom in on the graphic, click and drag the computer mouse over the desired time window.
- **Reset zoom**. To return to the default view, click **Reset Zoom**.
- **Close**. To close the **Send Time Optimization Overview**, click **Close**  in the upper right corner.

Validating mailing prior to dispatch

> **Note:** To enable this feature, contact customer support.

This add-on validates whether predefined parameters of a mailing are met. The validation is carried out prior to dispatch or when the mailing is saved. You can configure this automatic test for virtually any parameter of a mailing. You can validate against a defined value or check if a parameter is set.

For example, you can validate the mailing against the following conditions:

- Mailing must contain an attachment
- Maximum number of emails per hour is set for dispatch and lies within a defined range
- Target group is selected

Sending automatic notification after dispatch

> **Note:** To enable this feature, contact customer support.

This add-on sends a notification to an email address after a mailing is sent. The notification contains sending date and time, number of recipients, and additional mailing details.

Sending S/MIME-signed emails

> **Note:** To enable this feature, contact customer support.

Send S/MIME signed emails via Optimizely Campaign and increase your recipients' confidence. Thanks to your digital signature, your recipients can rest assured that the mes-

© Optimizely 2022

sages were sent by you, and the content was not subsequently manipulated. The digital signature includes components of an email, for example, attachments.

> **Note:** Digital signatures only ensure data integrity and do not apply to confidentiality. Emails protected with a digital signature are still sent as plain text. Message encryption of the S/MIME standard is not supported.

Prerequisites

To send S/MIME-signed emails via Optimizely Campaign, you need a S/MIME certificate issued by a certification body, which certifies the authenticity of the respective email address, for each email address used to send messages.

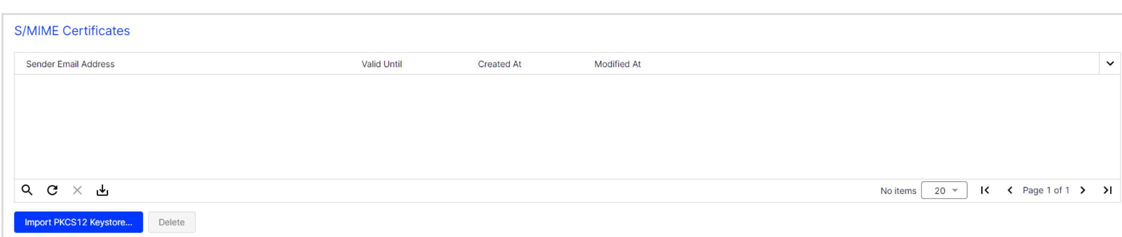
> **Tip:** To get an S/MIME certificate for your email, contact the certification body.

Importing S/MIME certificates

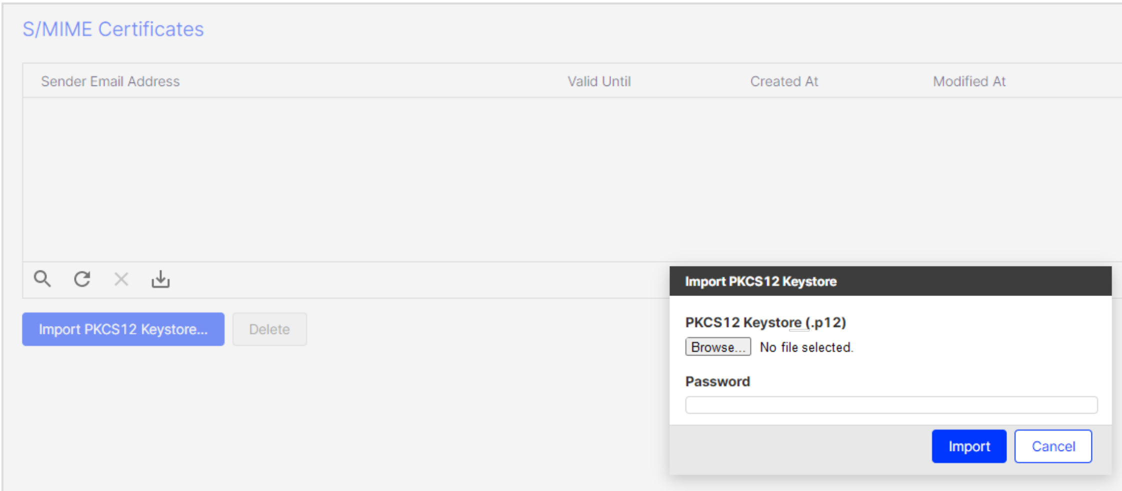
To import one or several S/MIME certificates, perform the following steps.

> **Note:** The certificate file must be in PKCS12 format. If it is not available that format, convert the file to that required format.

1. Open the Optimizely Campaign menu and select **Administration** > **S/MIME Certificates**. The **S/MIME Certificates** window opens.



2. Click **Import PKCS12 Keystore...**. The **Import PKCS12 Keystore** dialog box appears.



3. Click **Browse...** and select the certificate file to upload.
4. In the **Password** box, enter the backup password for your certificate file.
5. Click **Import**.

   You can find the certificate file in the list in the overview. See the list for information about the associated email address, the certificate's validity date, the creation and modification dates, and when the certificate is uploaded or changed.

> **Tip:** If you stored a S/MIME signature for your sender address, the notification **signed with S/MIME** is displayed in the **Edit Content** window above your sender address any time you edit a message.

Deleting S/MIME certificates

1. In the **S/MIME Certificates** window, select the S/MIME certificate you want to delete.
2. Click **Delete**. A confirmation window opens.
3. Click **Delete Certificate**.

Mailings Classic

> **Note:** Mailings Classic will be deactivated on 2022-03-01.
>
> To migrate Mailings Classic mailings to Smart Campaigns and edit them there, follow these steps.
>
> 1. In **Smart Campaigns**, select a Mailings Classic mailing from the list and click **Copy**. The selected mailing is duplicated and displayed as a campaign in the Smart Campaigns editing window.
> 2. Edit the campaign if necessary.
> 3. Click **Save and Close**. The **Save campaign** dialog box opens.
> 4. Enter a new name if required.
> 5. Click **Save**.

> **Note:** Mailings Classic is only available in the classic Optimizely Campaign user interface. See Start page.

Open the start menu and select **Campaigns** > **Mailings Classic**. The window shows mailings that were created with this client/account.

- **Status**. Indicates whether the mailing was sent, is being sent, or is still being worked on (status = new).
- **Start date**. Only filled in if a date is set for a mailing.
- **Type**. If your account is authorized to display the type, the corresponding column displays the specific type of each mailing. Types may be selected from the following:
  - **Regular**: Standard mailings.
  - **Special/API**. Mailings that are unique and activated using an interface (API) or an event. For example, a prepared mailing that every recipient receives once each year, such as on his or her birthday.
  - **Registration confirmation**. Prepared greeting mails are sent to new recipients.
  - **Templates**. Pre-configured mailings that contain sender information or content to simplify new mailing creation. Mailings of this type cannot be started.

© Optimizely 2022

Mailing action buttons

The buttons below the mailing list start one of these actions.

- **Create**. Create a new mailing and configure the mailing within a few steps. If your client is configured for different marketing channels, you can create emails and short messages.
- **Copy**. Copy an existing mailing. The entry fields (subject, content, recipient list and so on) are filled with the same values as the source mailing.
- **Edit**. Change the values in a mailing, only if sending is not started.
- **Delete**. Delete a mailing that was not sent.
- **Start**. Start a mailing.
- **Abort sending**. Cancel the sending of a mailing.

> **Note:** You cannot restart an aborted mailing.

- **Split**: See A/B test.
- **Preview**. Display a personalized preview of a mailing with the following steps:
  1. In the **Mailing** drop-down list, select a mailing.
  2. Click **Preview**.
  3. In the **Recipient list** drop-down list, select a recipient list then a recipient.
  4. Click **Show**.

Information area

The area in the below half of the screen offers information about your mailings. Select a mailing from the list above.

- **Details**. Displays data about the selected mailing, such as ID, name, creation date, sending date, recipient lists and target groups.
- **Report**: Displays the most important report data for the mailing. Until the mailing is star-ted, fields are empty or zero.

> **Note:** Some fields show two values. The italic value indicates a unique value, such as a unique user action. If a recipient clicks

> one link several times, this counts as one unique click because the same recipient clicked the same link.
>
> If percentages for **Gross-...** are indicated, the value is related to the total number of recipients for a mailing. If the **Gross-...** prefix is not used, the value relates to the number of **Recipients w/o bounces**. The latter is the more practical count, because it refers to recipients who received the mailing and could react, either in the form of opens or clicks.

The following values are displayed in the summary:

> **Tip:** The following list is only a summary of the most important core indicators.

- **Recipients**. Number of recipients to whom Optimizely Campaign attempted to send a mailing.
- **Recipients w/o bounces**. Number of recipients whose email addresses did not produce a bounce (message of non-deliverability).
- **Recipients skipped**. Number of recipients to whom the mailing could not be sent because their addresses were false.
- **Recipients in queue**. Only applies to mailings currently being sent. Number of recipients who were not sent a mailing.
- **Unique bounces**. Number of unique non-deliverability messages received by Optimizely Campaign after a mailing.
- **Unique bounce rate**. Percentage of unique bounces.
- **... of which are hard bounces**. Percentage of hard bounces.
- **... of which are soft bounces**. Percentage of soft bounces.
- **Unique opens**. If a recipient opens a mailing several times, this option only counts them as one unique open.
- **Opens**. Number of opens.
- **Unique open rate**. Percentage of unique opens in relation to the number of recipients w/o bounces.
- **Open rate**. Percentage of opens in relation to the number of recipients w/o bounces.

- **Unique gross open rate**. Percentage of unique opens in relation to the number of recipients.
- **Gross open rate**. Percentage of opens by recipients.
- **Unique clicks**. Number of unique recipients that clicked an arbitrary link in a mailing. It does not matter how often and which link was clicked.
- **Clicks**. Number of clicks.
- **Unique click rate**. Percentage of unique clicks in relation to the number of recipients w/o bounces.
- **Click rate**. Percentage of clicks in relation to the number of recipients w/o bounces.
- **Unique gross click rate**. Percentage of unique clicks in relation to the total number of recipients.
- **Gross click rate**. Percentage of clicks of recipients.
- **Effective unique click rate**. Percentage of unique clicks in relation to the unique opens.
- **Unique unsubscribes**. Number of clicks on the unsubscribe link.
- **Unique unsubscribe rate**. Percentage of clicks on the unsubscribe link in relation to the number of recipients w/o bounces.
- **Unique gross unsubscribe rate**. Percentage of clicks on the unsubscribe link in relation to the total number of recipients.
- **Content preview**. Displays the mailing and its subject line.

Step 1. Name and description

> **Note:** This data is used internally by Optimizely Campaign. It is not part of emails sent to mail recipients.

Enter a name to identify your mailings, such as "Customer Newsletter from May 23, 2018" or "Product Information for Ball Bearing 234/3 Rollout".

The **Description** field is optional. Content here shows up in the **Overview** menu item. Select a mail format:

- **Text only**. Use for most personal emails. You cannot include images, colors, or bold text.
- **HTML only**. Use to mail in HTML. Be aware that recipients may receive unreadable emails if they have older email software that cannot display HTML.

- **Multipart**. Contains content in text and HTML formats. The HTML version is shown to most recipients. If the recipient's email software cannot display HTML, the text version is displayed.

> **Tip:** Some people prefer HTML mail because of additional features and information (images, color highlighting and so on), while others prefer text email to read without graphical distractions. Consider letting recipients choose between text and HTML format when subscribing to your newsletter, and save this information in your database.

Step 2. Recipients and sender

Recipients

You can select one or more recipient lists for mailing by enabling the associated check boxes. Optimizely Campaign ensures that recipients on several lists only receive the mailing once.

You can select a target group to address a subset of a recipient list. Use target groups to guarantee that each test mailing is addressed to different recipients, and no recipient will receive two mailings. To do this:

1. Send the first test mailing.
2. Create a target group with the definition **Recipient did not receive [name of the first test mailing]**.
3. When sending the second mailing, select this target group.
4. When sending the mailing to the remainder of the list, continue in this manner.

In this case, the target group should be defined as **Recipient did not receive [name of the first test mailing] AND Recipient did not receive [name of the second test mailing]**.

To display the number of recipients, click **Calculate the number of possible recipients**.

Determining the order of recipients in a mailing

By default, recipients are addressed in the order in which they were entered into the list. To use a random selection of available recipients, select the **Random selection** check box.

Testing different versions of a mailing

1. In the **Maximum number of recipients** box, specify a number of recipients.
2. Copy the mailing.
3. Modify one or more parameters (subject, content, and so on).
4. Send that version to a different part of your list.
5. Compare results (clicks, openings, and so on).
6. Copy the mailing with the best performance to be sent to the remaining recipients.

Sender

You can specify which sender address should appear in the recipient's email software when your message is received.

- **Email address**. Enter the address section of the sender in this field. The domain section (behind the @) is fixed and cannot be changed.
- **Name**. This is typically your company name.

For example, `"Example Inc. [info@example.com]"`: `"Example Inc."` is the name and `"info@example.com"` is the email address.

> **Tip:** Be consistent in your sender address. Changing your email address or name may cause the recipient's email program to treat your mailings differently, and negatively impact your mailing's success.

Step 3. Subject and content

Editing content

Content management system (CMS), the Optimizely template kit or HTML code: read about editing tools for your mailings in Editing message content.

Subject

Your mailing's subject line appears next to the sender address in the recipient's email program. The sender and subject most strongly influence a mailing's open rate. You should limit the subject's length, such as 45-60 characters, because some email programs might cut off longer lines.

> **Tip:** The additional feature *Prefix or suffix subject line* lets you automatically add a prefix or suffix to the subject line of any mailing. See Prefix or suffix subject line.

Unicode characters

You can use Unicode characters in the subject line to increase the recipients' attention. Instead of using a plain text subject line, like *NEW! Bikini "Malibu" now in the shop*, you can enhance it with Unicode characters: *NEW! Bikini "Malibu" now in the shop* 😍👙🌺.

At www.unicode.org you can find a list of Unicode characters that are supported by most web browsers and email clients. Copy the desired symbol from the list and paste it into the subject line. Also set the character set to UTF-8 to display Unicode characters correctly. See **Character set**.

> **Note:** Unicode characters are displayed differently by different operating systems (iOS, Android, and so on) and email clients (Gmail, Outlook, and so on) Therefore, always send a test message to check the appearance before sending.

Content templates

The content of your mailing is created using content templates in Optimizely Campaign. Use the **Free Text** template if you create your mailings externally (outside of Optimizely Campaign), for example, through your agency or yourself using an HTML editor. This template lets you copy prepared text and HTML content directly.

However, if your mailings will have the same appearance (as is usually the case for newsletters), you can save time using specially-prepared content templates. The templates are designed to your specifications by Optimizely. Or, you can use the Template Kit.

Using content templates, you can create the content of your mailing using predefined *modules*. When creating a new mailing, just enter the text and upload images. Optimizely Campaign creates a completely formatted mailing. No knowledge of HTML is needed.

To use a template for your mailing, select it and click **Edit**.

> **Tip: About templates**
>
> See Designing a newsletter about email design using templates. Get tips and instructions for design and examples and suggestions from template developers.

Content attachments

To send attachments with a mailing, click the **Attachments** tab. If you have already sent mailings with attachments, the attachment files appear in the overview. To send one of these files as an attachment to the current mailing, select the check box next to the file description.

To send a new file as an attachment, follow these steps.

1. Click **New**. The assistant for uploading attachment opens.
2. Select whether to upload a file from your computer, or a URL that links to a file. If you choose **Upload from hard drive**, a copy of the file is created in the Optimizely Campaign server. If you choose **Use URL**, make sure that the file is available when the mailing is sent.

3. Click **Next**.
4. Click **Browse...** and select the file to be uploaded. If you link a file using a URL, enter the full URL.
5. Click **Next**.
6. Complete the **File name** and **Description** boxes. Optimizely Campaign uses the name and description for internal management of the attachments, but not for the sending.
7. Click **Save** to make the file available as an attachment. After you upload or link the file, it appears in the list and can be sent as attachment for current and future mailings.

> **Note: Special characters in file names of attachments**
>
> Do not use an umlaut and ß in the file name. Some email clients remove special characters from the file name. Nevertheless, the recipients can still open and save the attachments. Only the name is changed.

> **Warning:** Do not delete files from the list of attachments even if they only were attached to a single mailing. If you delete the file from the file server, it will no longer be available to recipients when they open the email.

> **Note: Send attachments in offline HTML mode**
>
> Attachments sent in this mode are loaded immediately upon receipt of the email. So, do not send large files in this mode, as this may delay the receipt of the email.
>
> Due to a bug in the Apple email client, attachments sent in HTML offline mode do not appear in Apple Mail and on iPhones. If you send attachments in standard mode, there is no such problem.

Personalized Attachments

Use Personalized Attachments to send attachments to particular recipients. Before sending the email, you must transmit such attachments to Optimizely Campaign using HTTP

API. The uploaded attachments can be used when sending transaction emails. For example, you can send invoices and order confirmations to your recipients. See the HTTP API manual.

Character set

Use the drop-down list **Character set ("Encoding")** to select the character set to be used for encoding your mailing.

- **ISO-8859-1**. For recipients in German-speaking, Western European and North American countries.
- **ISO-8859-2**. For recipients in Central-South-Eastern Europe, for example in Poland, Croatia or Slovakia.
- **UTF-8**. Supports most special characters of all languages. Select this encoding if you are writing to recipients in other regions of the world, such as Eastern Europe or Turkey.

Step 4. Tracking

Track opens and clicks of your mailings and use the data to analyze and optimize your campaigns.

Opens

If you check the **Track opens** box, Optimizely Campaign monitors how many recipients opened your mailing. This number is available in a report generated later.

When sending a mailing, Optimizely Campaign inserts at the bottom of each email a reference as a 1x1 pixel, transparent graphic. This reference contains a unique ID for each recipient. When the recipient opens the email, the program loads the graphic from the Optimizely server. Optimizely Campaign then receives the recipient ID, so it can track that the user opened the email.

This measurement is only possible if the user opens an HTML mail (text mail does not support graphics) and is online at that time. So, you should perceive the rate of opens as relative, not absolute. If, for example, the open rate doubles from one mailing to the next, you probably selected an enticing subject line.

> **Tip:** The **Anonymize tracking** feature lets you deactivate personalized tracking of opens for a recipient. If you do, the recipient is no longer included in action-based target groups. See Recipients overview. You can also use the Optimizely Campaign HTTP API to set up the tracking opt-out option in your mailings. See HTTP API on Optimizely World.

Clicks

If you check the **Enable link tracking** box, clicks on links in the mailing are recorded. This number can be retrieved in a subsequent report.

Optimizely Campaign displays a list that includes links you used. In the **Occurrence** column, you can see how many times each link is used in the text or HTML section. The **Description** column better identifies the link in subsequent reports.

Because URLs can be long and cryptic, you can enter a clear label for each link here. To do that:

1. Mark the line you want to modify.
2. Click **Edit link**.
3. In the description field, enter the name for the linked page (such as Homepage, Order form and so on).
4. Click **Apply**.

The **HTML on** or **Text on** column lets you determine whether to record clicks for each link and content type (Text/HTML). Normally, it is useful to track each link in HTML email. But in plain text email, you may want to keep URLs clean and readable instead of transforming them into cryptic tracking links. For example, in "For information, click www.example.com," the link is more likely to be clicked than a tracking link consisting of symbols and numbers.

> **Tip:** The **Anonymize tracking** feature lets you deactivate personalized click tracking for a recipient. If you do, the recipient is no longer included in action-based target groups. See Recipients overview. You can also use the Optimizely Campaign HTTP API to set up

> the tracking opt-out option in your mailings. See HTTP API on Optimizely World.

Click profiles

In the **Click profiles** column, you can assign a link to a click profile. To do so:

1. Select a link.
2. Click **Edit link**.
3. Click the **Profile** field.
4. In the **Assign click profile** window, select one or more profiles and click **OK**.

Rule-based click profiles are displayed without having them assigned to the respective link, because they are assigned automatically. You may add more profiles, though, to rule-based profiles.

Rule-based profiles cannot be removed from a link to which they are assigned. But, you can assign a link that does not match the rule to the profile based on the rule.

Step 5. Test email

Before sending any mailings, send a test mail. This topic explains the test lists configured for your account. Normally, there is one list of people who can receive a test mail (you, your co-workers, superiors and so on).

When you select a test list, its recipients are displayed below. To add a recipient, click **Add recipient**.

To send a test email, select recipients by checking the box and clicking either

- **Send email**. Sends a multi-part message
- **Send HTML version**. Sends a HTML message
- **Send text version**. Sends a text message

If the format is **Text** or **HTML**, you cannot send a multi-part test email. If your default format is **Multipart**, you should test all three options because your email client does not let you decide whether you want to receive a multi-part email as plain text or HTML.

Click **Test email to target group** to open a wizard that helps you send target group-based versions of your mailing, even if they do not match the target group criteria.

> **Tip:** If you use a personalized subject line, make sure that your test list contains the same fields used for personalization (for example, name). Otherwise, the test emails have the default subject line, because no personalization field is available to create a personalized subject line.

If you want to change the mailing after receiving test email, go back to step 3, change the content, then send a new test mail.

Step 6. Sending options

In the **Options** tab, select the mailing's sending time and speed. Furthermore, you can select a folder in which to save your mailing.

Whether you send your mailing now or later, it is saved in this step. If you select the option **Save mailing and start it at the following date and time** or **Save mailing and start it manually later**, you can edit your mailing until it is sent. But mailings that start immediately cannot be changed.

Saving mailing and starting it manually later

Use this option if you, for example, are waiting for a release for your mailing, or if you know that changes need to be made, or if the sending time is not determined. Any time after saving the mailing, you can use the **Overview** menu item to call up and change it.

Saving mailing and starting it at a later date and time

If your mailing is to be sent at a predetermined time, set the desired start date and time in this **Mailings** window field. To do so, click the arrow next to the current date. A calendar opens, from which you can select the mailing date and time. You can also change the mailing after it is saved (and before the specified starting time).

Saving mailing and delaying start after all split mailings are sent

This option lets you set a delay between the sending of last split mailing and the main mailing. It is helpful, for instance, to get reliable opens or click rates, because not all recipients open and click a mailing upon receiving it. The delay should be from a couple of hours to a couple of days.

Starting mailing immediately

Use this option if you tested your mailing and want to send it immediately. Be aware that the mailing starts immediately after clicking **Save**. Afterward, you cannot make corrections.

Saving mailing in a folder

To choose a folder in which you want to save your mailing, click the **Folder** field and select a folder. Alternatively, click the plus icon **+** in the status bar to create a new folder.

Setting the sending rate

Optimizely Campaign sends up to 50 million emails per hour. In some cases, this is too fast. For example, you have a large mailing list, and the mailing encourages recipients to call a telephone number. Your call center could get overloaded. In such a case, set a maximum number of mails to send per hour. The minimum is 1,000 per hour.

If you leave the field blank, your mailing is sent at maximum speed.

Offline HTML

This option attaches images and style sheets directly to the email. This option may provide a better representation of your mailing in a recipient's email client, but may also result in a worse deliverability of your email.

Also, offline HTML may increase the price because the overall size of every email grows. In addition, open tracking is disabled (clicks are counted as opens anyway).

Managing content

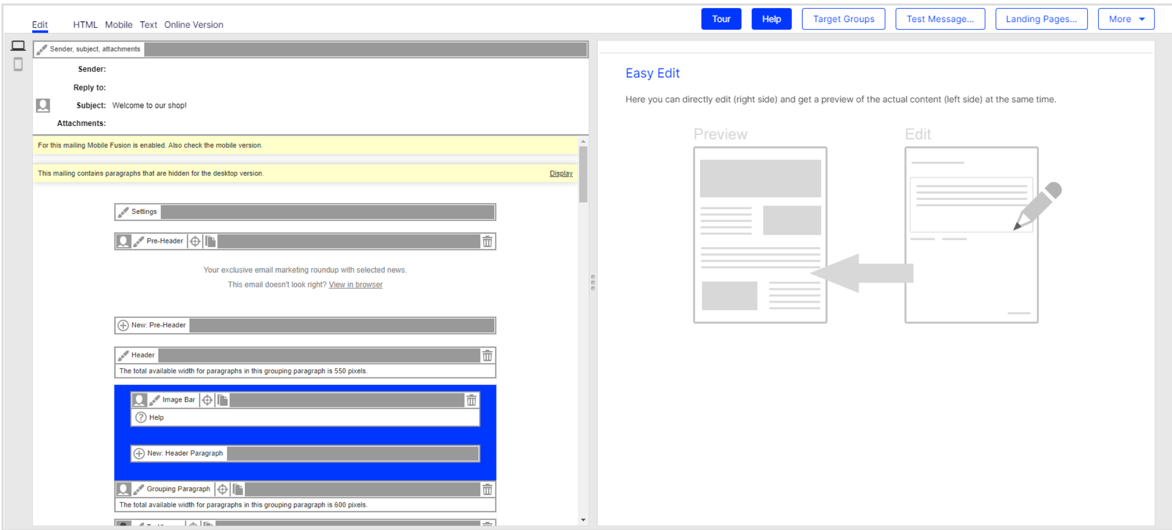
The Optimizely Campaign's content management system lets you create, edit and manage mailing content, and design interactive and personalized content.

- Edit mailing content. Use the integrated content editor.
- Template Kit. Create and edit mailings with the mailing kit.
- Field functions. Script and use field functions.
- Coupon system. Create coupon blocks and embed coupons in mailings.
- Countdown timers. Create countdown timers and embed them in mailings.
- Click2Go. Create call-to-action buttons and embed them in mailings.
- Easy Copy. Copy mailing content.
- Mobile Fusion. Optimize mailings for mobile display.
- Attachments. Upload and edit attachments.
- Prefix or suffix subject line. Enable text to be automatically added to subject lines.
- Uploading files. Upload files manually.
- Publish mailing. Copy mailings to other clients.
- Video emails. Embed videos in mailings.
- Designing a newsletter. Layout tips for newsletter design.

Editing mailing content

This topic describes how to use the **Easy Edit** CMS with integrated rich text editor to edit mailings in the Template Kit. The mailing is displayed as it will look when sent.

© Optimizely 2022



Editable content elements have a menu bar with buttons for editing, moving, copying and deleting. Depending on your template configuration, you might be able to, for example, edit some elements, but not move or delete them. In this case, the menu bar shows only the **Edit** button .

> **Tip:** Click **Tour** next to the action buttons at the upper right edge of the editor window for an interactive tour of the Template Kit.

> **Tip:** On the left side above is the **sender, subject, attachments** area. You must enter a sender, a sender email address and a reply-to email address to send the mailing. For more information, see Smart Campaigns Step 2. Configuring the Message.

Paragraphs

On the left side, you can find a preview of your message template with its paragraphs (content elements). Paragraphs can contain various content types (text, images, banners, lists, and so on). In a template, content is included as a paragraph. You can add,import, edit, move, copy, and delete paragraphs.

Add

The **New: ...** button appears wherever you can insert a new paragraph. Click it to insert one. Depending on the complexity of your template, you must select a sub-type of the inserted paragraph in the next step. Click **Save** to add the new element to your mailing.

Import

See **Easy Copy**.

1. Click **New: ...**.
2. Click **Import paragraph** and select the source.
3. In the **Source client** drop-down list, select a client. If you only use one client, it is already selected.
4. In the **Source content** drop-down list, select a message or message template and click **Next**. Importable paragraphs from the source are shown.
5. Check the boxes of paragraphs you want to import.
6. Click **Import paragraphs**.

Edit

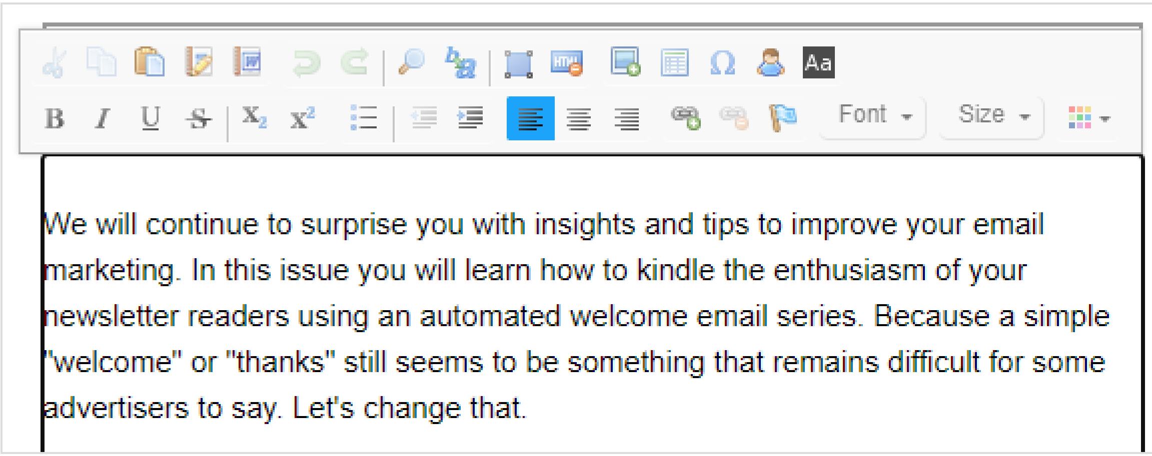
To edit a paragraph click **Edit** . The edit area opens in a new layer on the right side.

You can edit texts by using the rich text editor.

Paragraph types contain several tabs and input fields for entering content, setting the layout, and assigning target groups or click profiles. See Template Kit.

Inline editing

Instead of using the rich text editor, you can edit texts directly by clicking the text below a paragraph. The editor toolbar with buttons for text formatting appears.



> **Tip:** The rich text editor has an additional **Source** button that lets you edit the text's HTML code.

Move

> **Tip:** Some paragraphs cannot be moved everywhere, or can only be moved within a certain section. You can only add new paragraphs at the end of a content section (header, footer, paragraph group and so on).

To move a paragraph, click **Move** and move the cursor where you want to insert it. When the message **Click here to move the selected paragraph above this paragraph** appears, click again.

Copy

To copy a paragraph, click **Copy** then move the cursor to the position where you want to insert it. When the message **Click here to copy the selected paragraph above this paragraph** appears, click again to drop and insert the copied paragraph.

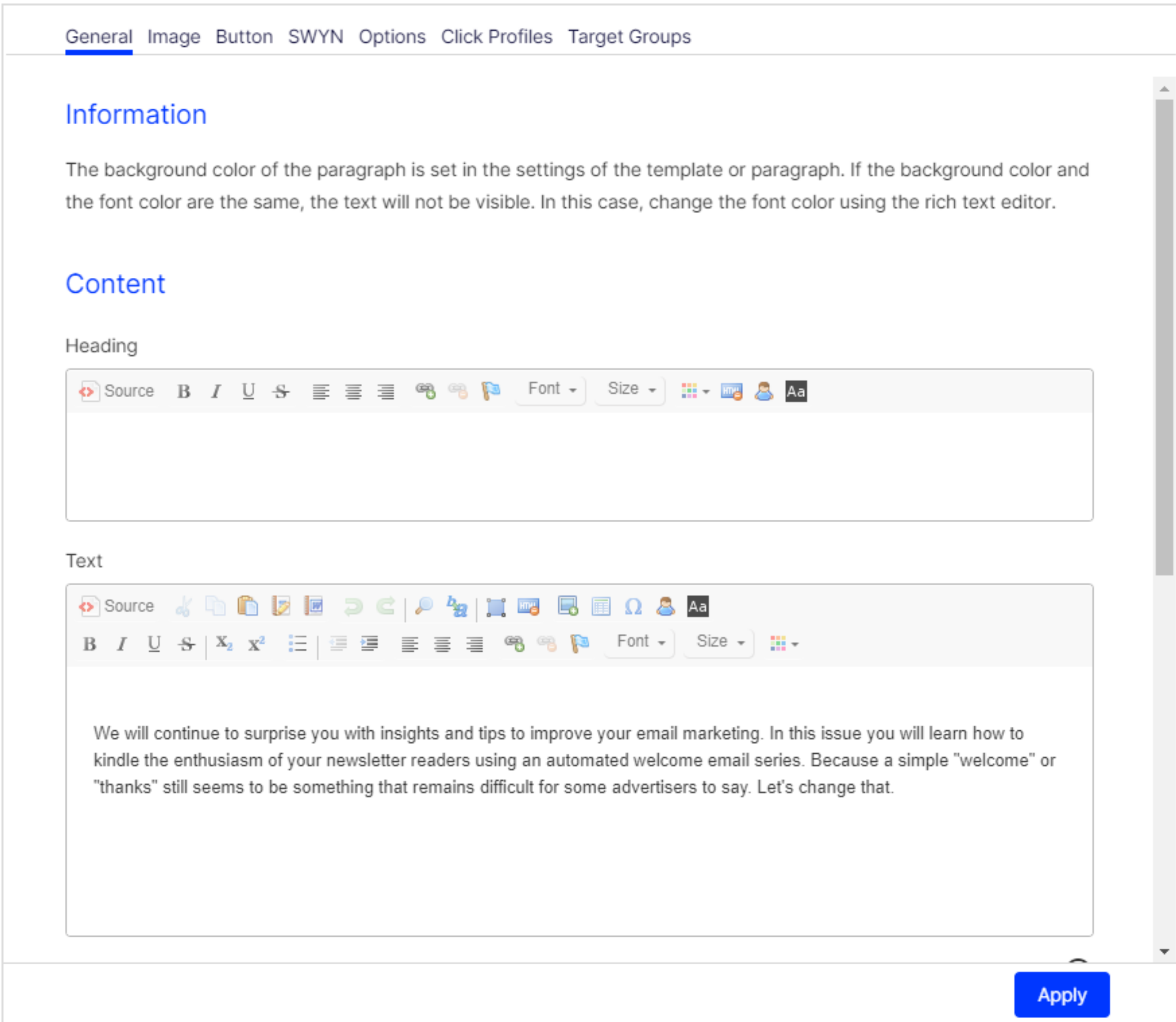
Delete

To delete a paragraph, click **Delete** .

> **Tip:** Some paragraphs cannot be deleted.

Working with the rich text editor

For any text input (except headlines, subtitles or links), templates provide a rich text editor. The rich text editor opens in the right side configurations window when clicking the name of a paragraph or when creating a new content paragraph with optional text.



The editor toolbar has buttons for simple text formatting similar to those in text processing software.

Change the content and click **Apply**; a preview appears on the left side. You can change the view mode to HTML, mobile, text and online preview of the mailing.

Editing source code

To edit the HTML code of the text, click **Source**. To return to the text view, click **Source** again.

Inserting field functions

In the editor toolbar, click **Insert field function** to insert a field function. Field functions can insert the content of a recipient list field, a personalization algorithm, or other personalized content.

> **Tip: Personalized links**
>
> You also can use field functions to create personalized links in your mailings. You can use field function placeholders in the domain part or path of a URL and in URL parameters. The link tracking of personalized links works as in regular links.

Changing background color

When working in the rich text editor with a white font or very light font, change the editor background color to make editing easier. Click **Change background color** in the toolbar of the relevant text field. Click the button again to change the background back to white.

Inserting images

You can insert images directly into the text field by clicking **Image** .

Some paragraph types also let you insert an image, either in the **General** tab or in **Image** tab. If an image can be inserted, you find a **Browse...** button and an **Alternative URL** field.

Images can either be uploaded from your computer or referenced via a URL. If you choose the latter option, make sure the image is available at the indicated server when the mailing is being sent. Otherwise, the sending cannot be done.

- Image files can be formatted as .jpg, .jpeg, .png or .gif.
- Images used in a mailing are automatically scaled to the size defined in the template. For the best image quality, however, you should resize images to fit before uploading them.

To delete an image, click **Delete** then **Save**.

Creating anchor links

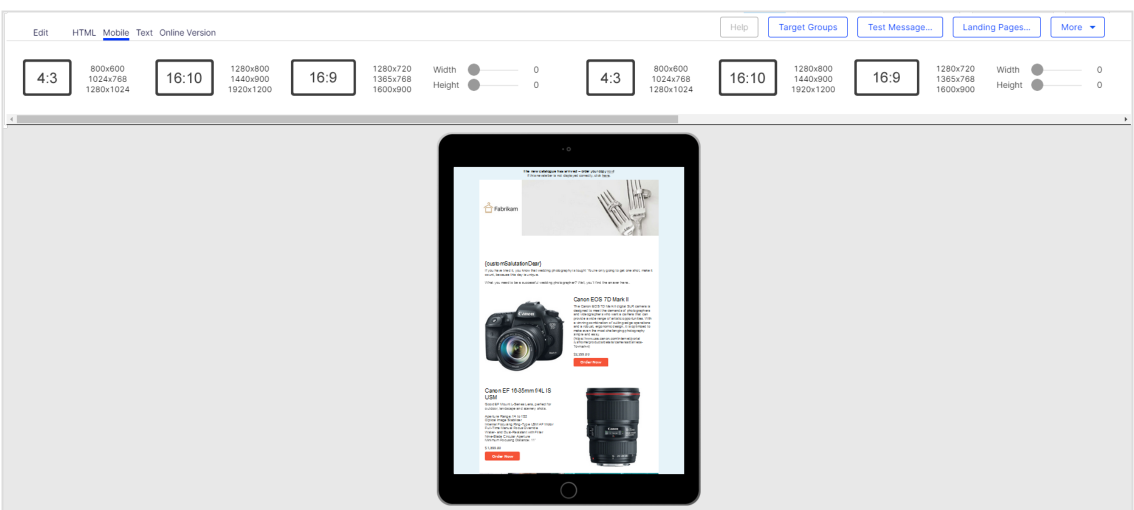
You can use anchors to refer to places within the mailing. To create anchor links, do the following:

1. Place the cursor in the text in the rich-text editor where you want to place the anchor.
2. Click **Anchor** on the editor toolbar and enter a name for the anchor.
3. Select the text in the rich-text editor where you want the link to the anchor.
4. Click **Link** on the editor toolbar.
5. In the **Link** dialog box, in the **Link Type** drop-down list, select **Link to anchor in the text**.
6. Under **Select an Anchor**, select the anchor.

Changing view

You can change the view mode of the mailing preview to **HTML**, **Mobile**, **Text** and **Online Version**. To change the view mode, click one of the tabs at the top left.

- In **HTML** preview mode, menu bars and buttons are hidden, and you see the mailing as it will appear to recipients.
- The **Mobile** tab displays a preview of your newsletter on several mobile devices and with various display modes. See also: Previewing on a mobile device.



- The **Text** tab shows the text-only version of the mailing.
- The **Online Version** tab shows the mailing as recipients will see it when they click the online version link on top.

Previewing on a mobile device

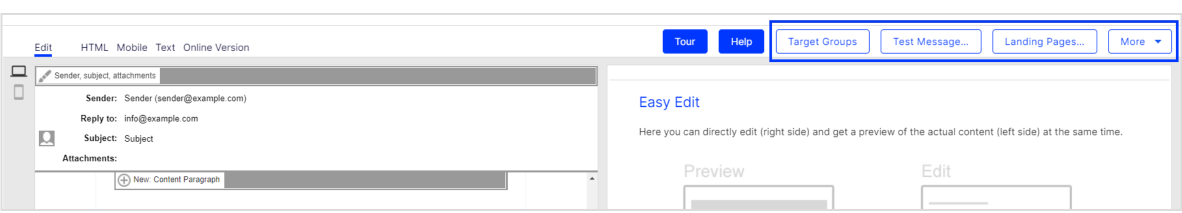
The **Mobile** tab lets you preview your mailing on mobile devices. If you use a template with integrated mobile version/Mobile Fusion, the optimized layout for each device is automatically shown. If you do not use a Mobile Fusion template, the HTML version appears and scales to fit the display of the selected mobile device.

> **Note:** The preview of a mailing serves only to test content and layout of the mobile version. The actual appearance on the devices may differ due to software versions and settings. To implement a preview for a mobile device not listed here, contact customer support.

To test different devices and display modes, perform the following steps:

1. In the list above the preview, click a mobile device. The mailing preview for this device is displayed.
2. Hover over the mailing preview; the arrow changes to a hand icon.
3. Click and move the mailing to scroll down and up in the preview.
4. Click **Rotate device** to switch between portrait and landscape mode.
5. Move the slider on the right to change the scale of the preview.

Action buttons



- **Target Groups**. Does not become active until at least one content element uses a target group. Click **Target Groups**, select one or more target groups, and click **Submit**

Selection. In the mailing preview, only the content elements that are assigned to the selected target groups are displayed.

- **Test Message...**. Send a test message to check the appearance of the mailing before the actual dispatch. For a test email, do the following:
  1. In the top toolbar in the editor, click **Test Message...**.
  2. In the **Recipient List** drop-down list, select a test list.

     > **Note:** Only use test lists and no real customer data. See also Recipient lists.

  3. If you want to simulate a target group, select a target group in the **Simulate Target Group** drop-down list.

     > **Tip:** The test recipients selected in the next step can also belong to other target groups.

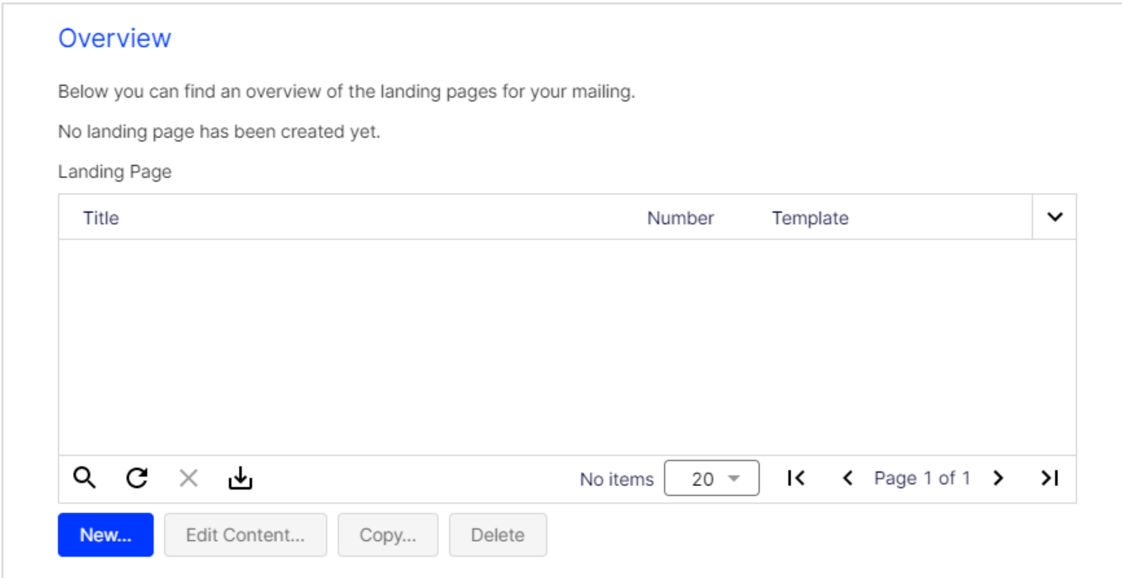
  4. In the **Recipients** list, select one or more recipients.

     To create a new test recipient, click **Create Recipient...** and enter the necessary recipient data. Then click **Submit**.

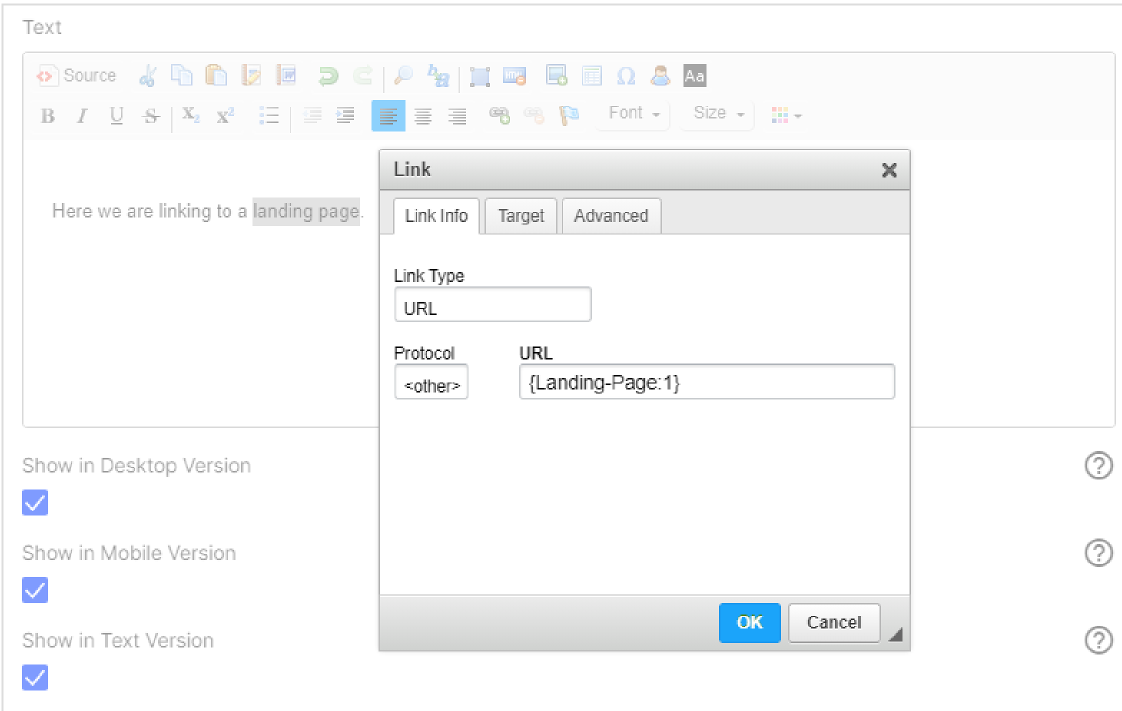
  5. Click **Send Email** to send the test messages in multi-part format, or click **Send HTML Version** or **Send Text Version** if you want to test only one format.

  > **Tip:** If you want to send a test message of type SMS or Mobile Push, see Nodes and elements.

- **Landing Pages...**. Create a new landing page or manage existing ones. If you create a new landing page, the layout of the selected mailing template is used. You can edit landing pages like a mailing in the editor and use your own layouts.



To link to a landing page in the mailing, enter the placeholder `{Landing page:n°}` in the **URL** box. In this placeholder, substitute the **n°** element with the landing page number (for example, `{Landing page:1}`). You can find the landing page number under **Landing Pages** in the list of available landing pages.



- **More**. Contains further options:
  - **Content report**. Get a content report for link validation.
  - **Print**. Print the mailing preview.
  - **HTML (PNG)**. Save the HTML preview of the mailing as an image in PNG format.
  - **Encoding/Offline HTML**. Specify the character set with which you want to encode your mailing and attach images and style sheets directly to the email. See Encoding/Offline HTML.
  - **Edit tracking links**. Opens and clicks are tracked as standard in both the HTML and text versions of a message. You can apply these settings globally or configure the tracking function for each link in a message. See Tracking.
  - **Retrieve RSS feeds**. Retrieve the data of all RSS feeds within this mailing.

    Note: Already existing RSS feeds will be deleted and manual changes are undone.

- **Import mailing content**. If you use the free-text template as content type, you can upload a ZIP file with the entire mailing content including HTML and text file as well as graphics. See Import mailing content.
- **Edit directly**. See **Edit directly (HTML)**.

> **Note:** The rich text editor cannot be used after the **Edit directly** option is enabled.

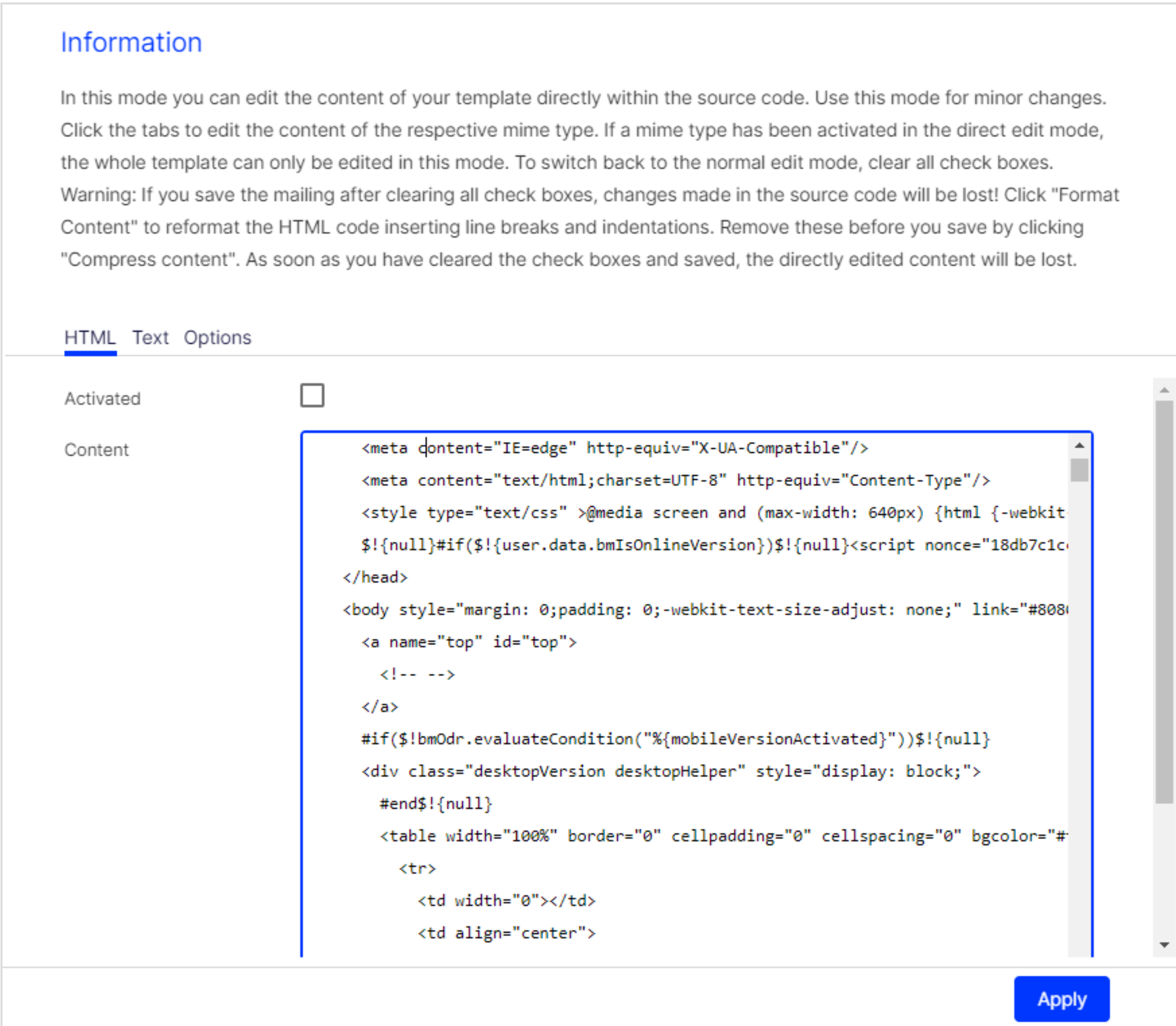
> **Tip:** Closing the editor window automatically saves changes.

Edit directly (HTML)

> **Warning:** If you activate the **Edit directly** mode, the original template cannot be edited afterwards. If you switch back from the **Edit directly** mode to the template editor, changes made in this mode are lost.

Instead of editing a template, you can edit the mailing's HTML source code. In the editor window's top toolbar, click the action button **More** > **Edit directly**.

Edit the HTML source code or the text version of your mailing. Select the tab to edit the desired version. Before you save changes, select the **Activated** check box.



When editing HTML code, you have the following options:

- **Format Content**. The code is reformatted, inserting line breaks and indenting the tags.
- **Compress Content**. Remove the line breaks and indented tags before saving. This removal ensures that velocity elements in the HTML code (for example, field functions) work correctly.

Template Kit

> **Tip:** Mailings created with the Template Kit are displayed correctly by the most common email clients and web browsers. Optimizely regularly checks compatibility, but individual email clients may cause display errors.

The generic Template Kit provides a flexible way to create newsletters. You can use it out-of-the box and with your corporate design style guide. Optionally, you can add Mobile Fusion to the Template Kit to optimize mailings for mobile devices.

- Transferring design specifications into the Template Kit

  If your company works with design specifications, use the Template Kit to turn these directly into mailings with no special knowledge of graphic design or composition.

Studies show that most design specifications can be mapped using the Template Kit. The layout of structural and content elements follows a logical pattern found in most newsletters. Optimizely uses standard terminology for the individual elements, so you can work with the Template Kit whether you are a graphic designer, editor, or project manager.

- Content inherits basic settings

  When basic preferences (such as text, background colors, spacing, and so on) are set, they are applied to content matter. This provides a consistent layout without needing to set additional preferences for content elements. The principle of hierarchical acquisition guarantees a layout-compliant/CI-compliant newsletter without the need to define each parameter. But If you need a different layout, whether at a structural or a content level, you can design each element.

- Separation of structure and content

  When developing the Template Kit, Optimizely implemented the systematic separation of structural and content elements. This feature provides the highest level of flexibility when designing newsletters.

- Configuration paragraphs for organizing your newsletter

  Configuration paragraphs greatly expand your design options. Each configuration paragraph functions like a section of the newsletter, which you supply with its own layout and content. Header and footer segments are also set up as configuration paragraphs.

- Flexible tables of contents

  The table of contents is the recipient's point-of-entry to your newsletter's content, and greatly impacts conversion rate. The Template Kit provides full control over the table of contents. Each configuration paragraph can have its own table of contents.

  - Single or two-column grids

    Optimizely provides multiple column layouts. You can set column width, position and spacing. You can set the configuration paragraphs individually, whether they are part of a single or two column layout.

If your mailing needs both layouts, be sure to use them efficiently and rationally. For example:

- A two column editorial with a table of contents in a sidebar: Make the most important content visible immediately without having to scroll, and place it in a prominent position next to the editorial, where references can be made to them.
- A single column product area: A sidebar is not needed in the product area. Use a single column layout to take maximum advantage of the newsletter's full width.

- Fully equipped and seamlessly integrated

  You can assign each element to a target group. You can also design pre-headers and newsletter headers and footers for specific target groups.

  - Click profiles

    The assignment of click profiles is integrated into the elements, so you can obtain valid data about recipient click behavior.

  - Sharing content via social networks

    You control what content is shared (SWYN), and the layout of share buttons and redirection.

  - Create landing pages

    You can create landing pages with a single click, edit them in the template editor, and link them to the desired location. Using the SWYN feature, landing pages are created and linked automatically.

  - Use pre-headers for a personalized approach

    You can include a greeting, a special offer, or a keyword specifically tailored to a target group.

  - Integrate your favicon

    Favicons are small icons, logos or symbols (such as your company logo) of 16×16 or 32×32 pixels. Typically, browsers display them in the address bar, on tabs, next to bookmarks, or in your history. You can integrate a favicon into the online version of your message with Optimizely Campaign.

Designing newsletters

Using templates, you can create mailings in a CI-compliant layout – with no graphics or HTML skills required. Templates offer you the flexibility you need by letting you design each element individually. And you do not have to worry about losing your overall layout, because templates store settings inherited from higher-level elements. Benefit: Text and mobile versions of your HTML mailings are generated automatically and can be edited subsequently.

> **Tip: Lacking inspiration? Optimizely can create your newsletter for you.**
>
> Optimizely can design your message template. On request, we can also implement your message template into Optimizely Campaign. For more information, contact customer support.

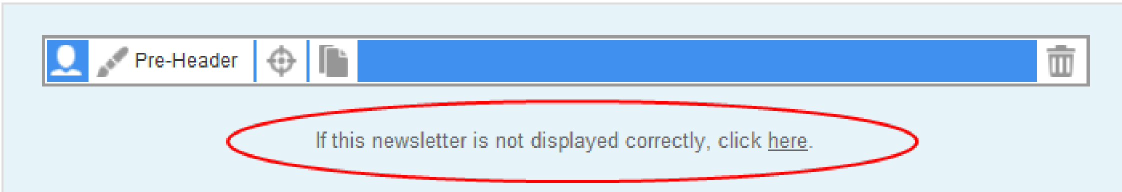
Layout fundamentals

Each paragraph in a template and even the template itself provides a range of design options that can affect the layout of your newsletter:

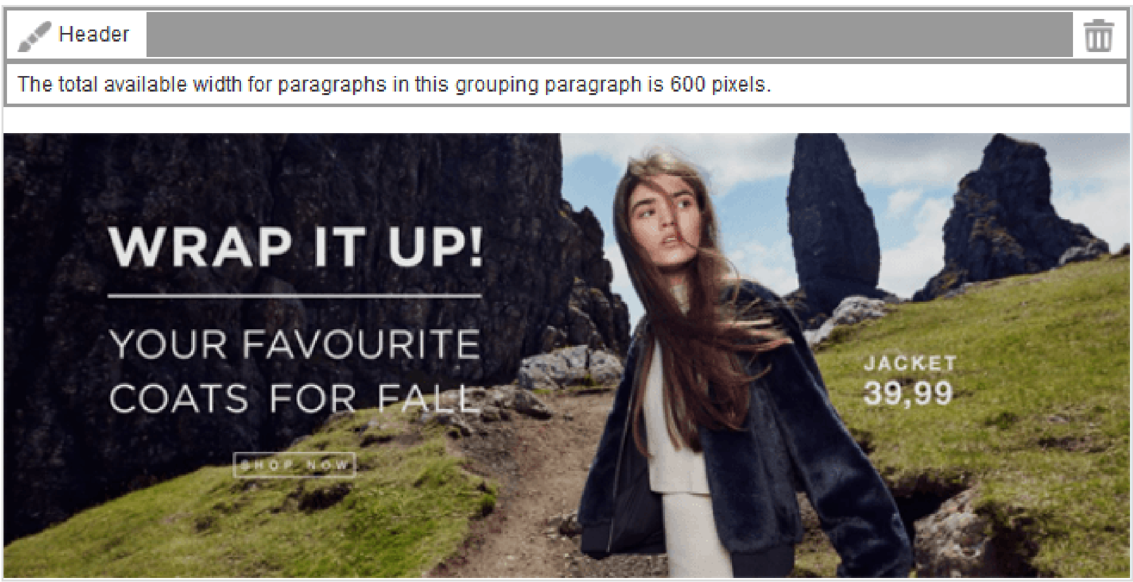
- Background color of the newsletter and newsletter background
- Background color or images incorporated into individual paragraphs
- Width of the newsletter
- Number of columns
- Margins and spacing of individual paragraphs

Examples and comments

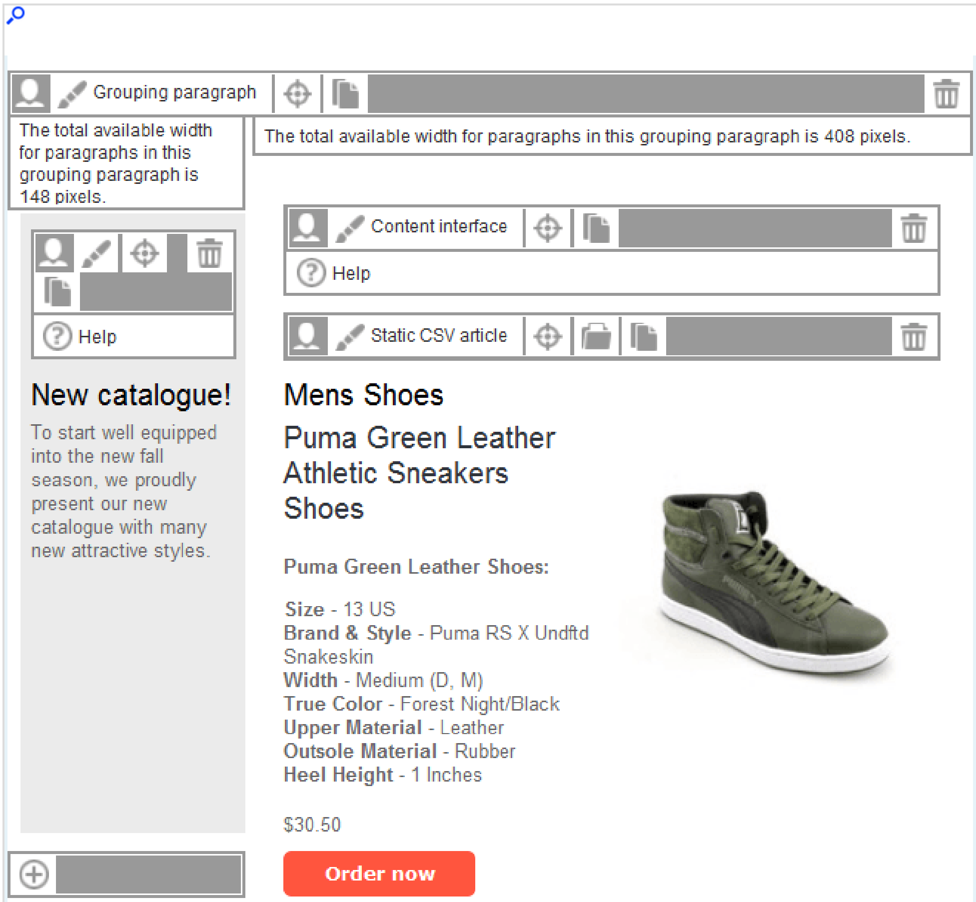
- **Pre-Header**. The pre-header contains a link to the online version. You can add pre-headers to display information prominently so that it is likely to catch the reader's eye.



- **Header**. The header contains an image and the newsletter's title. You can insert additional elements, such as date and issue. A graphics editor lets you incorporate elaborate text effects.

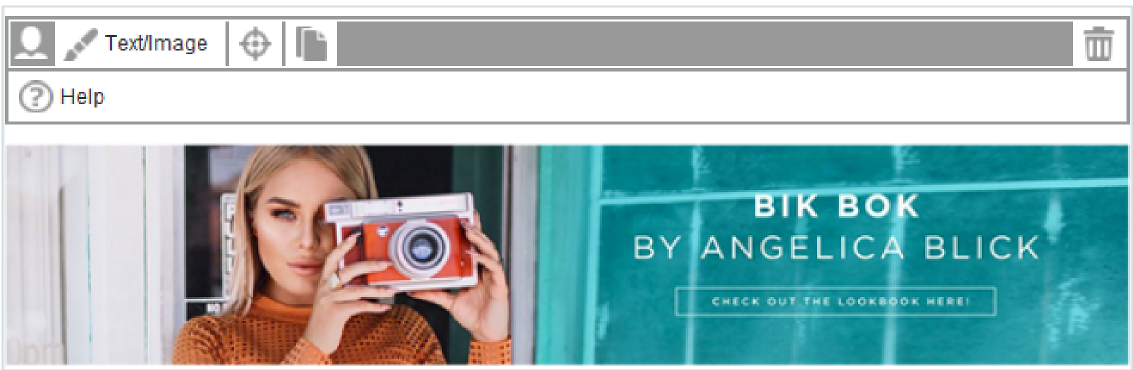


- **Sidebar**. The sidebar produces a two-column layout. In this example, the sidebar is given a different color to set it apart from the main body of the newsletter. If you choose this type of layout, set an inner margin to create a space between the box and the text. Similarly, set a margin between the sidebar and the main body of the newsletter so that the text/image block in the main body does not "cling" to the sidebar.

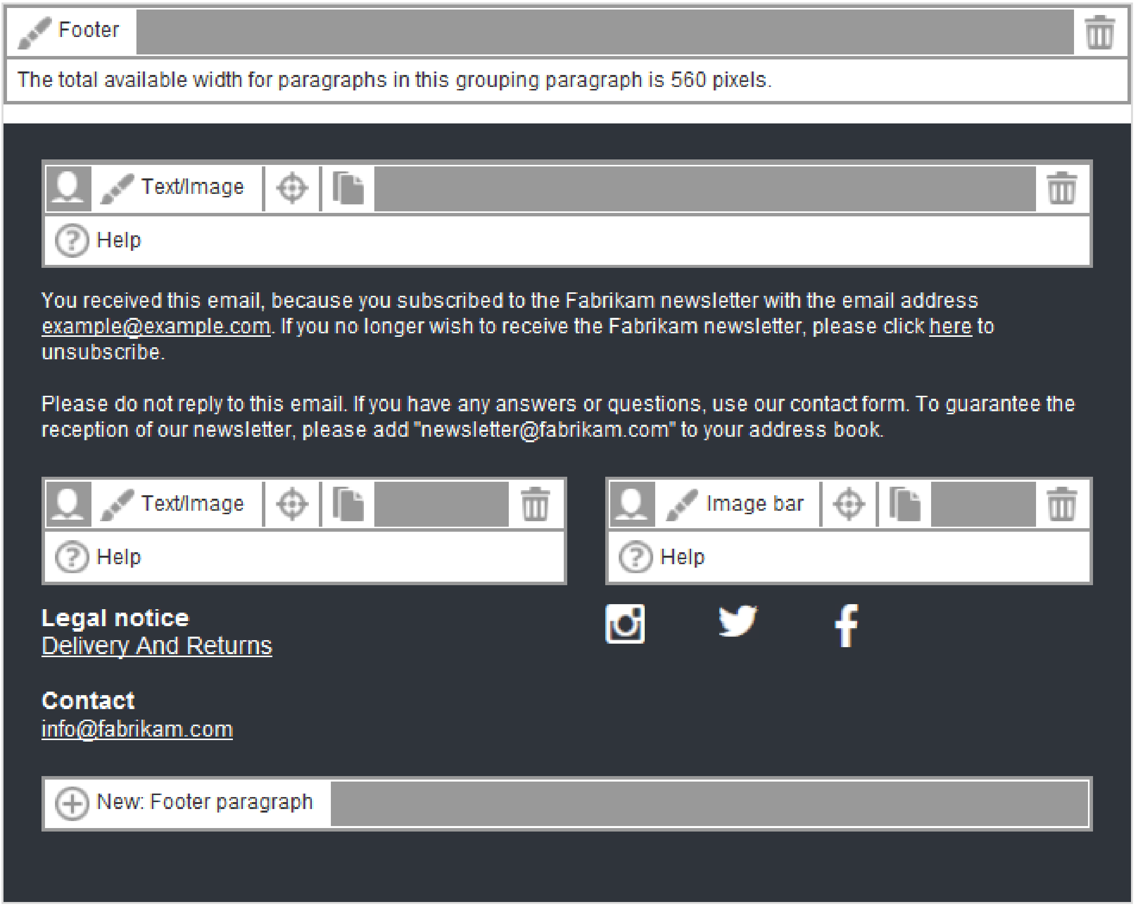


- **Main area**. The main area has the same color as the entire newsletter. The text/image paragraph runs across the total available width and does not require an inner margin. The image is centered between the title and the text. A teaser text links to a landing page.
- **Table of contents**. The table of contents is a separate type of paragraph and can be placed anywhere in the template. You can set a table of contents in a fixed position in individual mailing templates. You can enter the text that the table of contents displays into the individual paragraphs – or use the paragraph headings (standard).
- **Image position**. Here, the image is positioned on the left next to the heading. Larger images should be scaled down to 50 % of the available width. Images are positioned relative to text, link and heading. If you choose to position an image to the left below the heading, as opposed to the position shown here, then the heading will not be incorporated, which means it will appear across the full width of the paragraph.

- **Inline block**. Paragraphs with narrower widths are placed next to one another until the maximum width is filled. This way, you can create a layout with consecutive, variable columns. If the width is set to a particular portion of the total available width, then the individual blocks fill out the space precisely as indicated, generating a column layout.
- **Empty column**. In contrast to a single column layout, the sidebar is left blank, if no content is to be entered.
- **Single column**. With a single-column layout, a paragraph spans the entire width of the newsletter. To create a template with a variety of layouts (for example single-column or two-column), you will need to use paragraph outlines or special paragraphs.



- **Background color**. A single background color (the same as used for the sidebar) is chosen for these paragraphs. Set an inner margin to add space between the text block and the paragraph frame.
- **Variable footer**. A footer can contain multiple paragraphs. You can treat footer paragraphs the same as content paragraphs.
- **Fixed footer**. This footer contains the site notice and contact information for the newsletter. This usually also includes the unsubscribe option required by law. The paragraph is permanently stored and normally does not need to be adapted or edited further.



- **Newsletter width**. The ideal newsletter width depends on the recipient's device (responsive design):
  - **Desktop version**. 600 to 650 pixels.
  - **Mobile version**. 480 pixels (see Mobile Fusion).

Supported fonts

The Template Kit supports the following fonts.

- Arial
- Comic Sans
- Courier New
- Georgia

- Lucinda Sans Unicode
- Tahoma
- Times New Roman
- Trebuchet MS
- Verdana

You can store other fonts as an image in the Template Kit. Texts used this way cannot be edited with the Template Kit.

> **Note:** Images in the mailing are visible only after loading.

Design options

You cannot display color and background gradients and shadowing, but you can round off edges. If you want to create the message template in Optimizely Campaign yourself, do this in the relevant grouping paragraphs using the **Border** option.

Mobile Fusion

The Template Kit lets you preview your mailing on selected smart phones and tablets. So, you can check the vertical and horizontal mobile appearance of your newsletter.

Mobile content elements appear below one another, so a mobile reader does not have to scroll sideways, but can scroll up and down. And, you can specify whether images or text is shown first in content areas. You also have the option to show or hide content areas on the desktop versus the mobile version.

For more information, see Mobile Fusion.

General settings

Click **Settings** on the top border of the template editor to define fonts, basic grid, color schemes and other settings that affect the template. The assistant for these settings opens in a new layer with the tabs described in this topic.

General

These settings affect the general layout of the newsletter and content, unless you overwrite them in Content paragraphs. For example, use general settings to adapt your company's corporate design to this template.

Parameter	Description
Newsletter title	
Text	Appears in the browser window title of the online version.
Layout	
Width of the content area	Enter between 100 to 650 pixels to ensure that most email clients display the newsletter properly. If you set a greater value, test the newsletter with the deliverability preview.
Alignment	Set the alignment for the entire newsletter. But, you define the alignment of content elements in each content paragraph.
Margin	Specify up to 1/8 of the total newsletter width; larger margin distance negatively affects the layout.
Padding	Specify up to 1/8 of the total newsletter width to define space between borders and content (text or images). Padding is only effective if different background colors or images are defined for the newsletter and content elements.
Space between grouping paragraphs	If no other pixel value is set here, the **Padding** value is used.
Space between texts and images	Specify up to 20 pixels.
Image quality	If **High-resolution** is selected, the uploaded image must be at least double

Parameter	Description
	the width of the image in the mailing. Example: For a 640 pixel wide image in the mailing you need an image with a width of 1280 pixels. This ensures that images do not lose sharpness during rendering of the mailing.
Favicon	
URL	If desired, enter the URL of an externally-stored favicon for the online version of your message.
Inherit	
Header	The inherit header value affects landing pages, including automatically generated ones. To enter content different from the newsletter header in the respective areas of your landing pages, clear this check box.
Footer	The inherit value affects landing pages, including automatically generated ones. To enter content different from the newsletter footer in the respective areas of your landing pages, clear this check box.

Font settings

Define font types, size and line height for headings, text and links.

Parameter	Description
Headings	
Font type	Define several font types in a comma-separated list. The browser or email client tries to use the first font in this list. If this font is not installed on the system, the next is tried. The last option should define a generic font.
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Size	Define the size (integer) of heading text.

© Optimizely 2022

Parameter	Description
Line height	You can set an integer value greater than the font size; the default integer value is set by recipient's web browser or email client.
Underline	Select to underline headings.
Bold	Select to bold headings.
Text	
Font type	Define several font types in a comma-separated list. The browser or email client tries to use the first font in this list. If this font is not installed on the system, the next is tried. The last option should define a generic font.
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Size	Define the size (integer) of the text.
Line height	You can set an integer value greater than the font size; the default integer value is set by recipient's web browser or email client.
Links	
Font type	Define several font types in a comma-separated list. The browser or email client tries to use the first font in this list. If this font is not installed on the system, the next is tried. The last option should define a generic font.
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Size	Define the size of link text.
Line height	You can set an integer value greater than the font size; the default integer value is set by the web browser or email client of the recipient.

Parameter	Description
Underline	Select to underline links.
Bold	Select to bold links.
Table of contents with links to paragraphs	
Font type	Define several font types in a comma-separated list. The browser or email client tries to use the first font in this list. If this font is not installed on the system, the next is tried. The last option should define a generic font.
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Size	Define the size of TOC links.
Line height	You can set an integer value greater than the font size; the default integer value is set by the web browser or email client of the recipient.
Underline	Select to underline TOC links.
Bold	Select to bold TOC links.
Menu items in the navigation menu	
Font type	Define several font types in a comma-separated list. The browser or email client tries to use the first font in this list. If this font is not installed on the system, the next is tried. The last option should define a generic font.
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser. If you leave the field blank, the color you specified in the **Links** area is displayed.
Size	Enter the font size for the menu item labels in pixels. If you leave the field blank, the font size you specified in the **Links** area will be used.

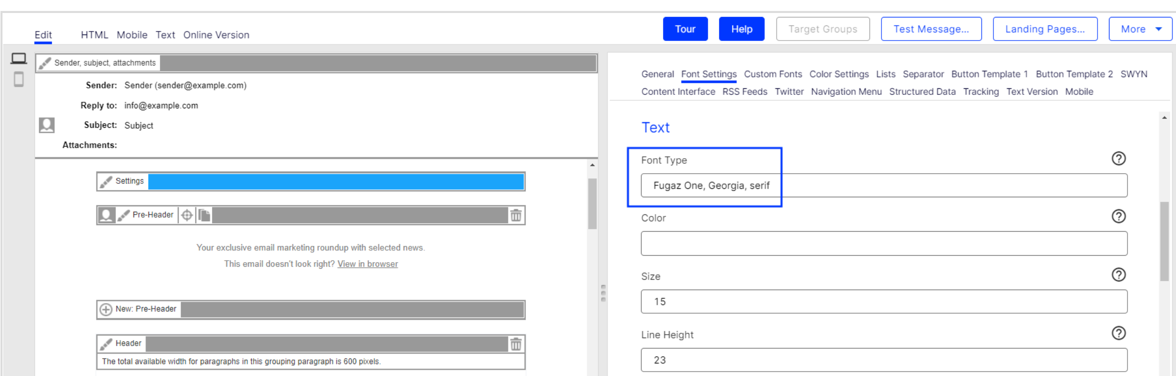
Parameter	Description
Line height	Enter the row height for the menu item labels in pixels. If you leave the field blank, the line height is automatically set by the email client of the recipient.
Underline	Select to underline menu items.
Bold	Select to bold menu items.

Custom fonts

> **Note:** To enable this feature, contact customer support. When setting up, provide the path (URL) to your custom fonts. This can be your own server or the server of a font provider (such as Google Fonts). If you want to use a server from Optimizely, Optimizely needs the font files. Optimizely itself cannot provide fonts.

Custom fonts are special fonts (such as your corporate font) that are downloaded from an external source when the email is opened. If you have configured custom fonts in your client, you can find an overview of the available fonts in the yellow box at the top of the edit area.

To use custom fonts, enter the font name in the desired input field in the **Font Settings** tab. Additionally define alternative fonts, for example *Fugaz One, Georgia, serif*.



Outlook fallbacks

Outlook does not support custom fonts. In the **Custom Fonts** tab under **Outlook Fallbacks**, specify which alternate fonts Outlook should use. You can find an overview of the defined Outlook fallbacks in the yellow box at the top of the edit area.

Parameter	Description
Outlook fallbacks	
Headings	Set Outlook fallbacks for **Headings**.
Text	Set Outlook fallbacks for **Text**.
Links	Set Outlook fallbacks for **Links**.
Table of contents with links to paragraphs	Set Outlook fallbacks for **Table of contents with links to paragraphs**.
Menu items in the navigation menu	Set Outlook fallbacks for **Menu items in the navigation menu**.
Buttons	Set Outlook fallbacks for **Buttons**.

> **Note:** Outlook only uses the defined fallbacks (except for **Buttons**) if you have set a custom font in the corresponding area in the **Font settings** tab. If you set a custom font without defining a fallback, Outlook uses an alternate font.

Color settings

Define general background colors or images and border colors in this tab. You can overwrite these settings in each content block.

© Optimizely 2022

Parameter	Description
Newsletter background	
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser. If you leave the field blank, the color you specified in the **Links** area is displayed.
Image	Because email clients do not support the display of background images, they should not contain important information. If you use a background image, the parameters **Alignment** and **Repeat** become effective. Be aware that a background image is only visible at border areas and free spaces, being masked by content and other backgrounds.
Alignment	Only effective if a background image is uploaded. Sets alignment for the entire newsletter. Alignment of the content elements is defined in the content paragraphs.
Repeat	Only effective if a background image is uploaded. Repeats the background image.
Content area background	
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser. If you leave the field blank, the color you specified in the **Links** area is displayed.
Border	
Show	Check to apply a border around the paragraph.
Border width	Enter an integer value in pixel. If you set this value to 0, no border will be displayed. The default border thickness is 1 pixel.
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser. If you leave the field blank, the color you specified in

Parameter	Description
	the **Links** area is displayed.
Layout	Specify whether the newsletter should be displayed with or without pre-header, header and footer.

Lists

Parameter	Description
Options	
List type	To use a simple bullet, under **List type**, select **Bullet list**. To use a custom bullet character, upload an image and, under **List type**, select **List with custom bullet character**.
Custom bullet character	Upload a bullet character or, in the **Alternatively external URL** field, enter an image URL pointing to the image source. The bullet character can be up to 30-pixels wide. Wider graphics are proportionally reduced to this size.

Separator

Use separator paragraphs to structure your newsletter and group paragraphs. Separators may contain a top link for a simple navigation, a separator line, the top link, an image, and free space. You can activate each elements individually in each separator paragraph.

Parameter	Description
Separator line	
Width	The maximum width equals the total newsletter width minus padding. If a top link icon with text is set on the separation line, the width of the line is reduced by the width of this element.
Alignment	The alignment parameter is only effective if the width is smaller than the total

Parameter	Description
	available width.
Border width	Enter an integer value in pixel.
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width of the separator	Set the width (in percent) of the separator line for the mobile version.
Top link	
Icon	You can replace the default icon with an uploaded custom icon. The maximum width equals the maximum width of the newsletter minus padding. Be aware that if you use wide graphics, the separator line, if used, is proportionally smaller. Graphics larger than the maximum width are scaled down.
Text	The text is shown. If the recipient's email client does not display the icon, the recipient sees only the text.
Text position	Select the position of the link text relative to the icon.
Position	Select the vertical position of the top link (text AND icon) relative to the separator line. By default, the top link is placed on the separator line.
Alignment	Select the horizontal position of the top link (text AND icon).
Image	
Image	Upload an image from your computer or enter an image URL in the **Alternatively external URL** field that points to the image file.
Alternative	This text appears if a recipient blocks or disables images in his/her email client, or

Parameter	Description
text	if the image cannot be displayed for another reason. You should enter an alternative text containing a short description of the image.
Link	You can link the image to a landing page or a page from your website. If you entered a text link in this paragraph, use the same link for the image.
Position	Specify the positioning of the image relative to the separator line and the top link. This positioning affects only the appearance if at least one or both of these elements are selected in a separator.
Alignment	Select the horizontal position of the image. If the image occupies the entire width, this parameter has no effect.
Spacing	
Above separator	You can optionally add this space later in each separator paragraph to improve the clarity of the newsletter.
Between top link and separator line and/or icon	You can optionally add this space later in each separator paragraph to improve the clarity of the newsletter.
Below separator	You can optionally add this space later in each separator paragraph to improve the clarity of the newsletter.

Button template

See Click2Go.

SWYN

If you use the share function for social networks (SWYN), define the general appearance of your newsletter's SWYN.

Parameter	Description
Introduction	
Text	Enter an introduction text that is shown together with the network icons. This text may contain a call-to-action for recipients to share content in their networks. Each paragraph for which the SWYN function is activated displays this text and the network icons.
Layout	
Space between elements	By default, the **Space between texts and images** setting from the **General** tab is used. The maximum space is 20 pixels.
Image quality	Select **Same as image quality in template settings** to use the image quality specified under **Settings** > **General**. The **Normal** and **High-resolution** options allow you to set the image quality independently of the template settings. If **High-resolution** is selected, the uploaded image must be at least double the width of the image in the mailing. Example: For a 640 pixel wide image in the mailing you need an image with a width of 1280 pixels. This ensures that images do not lose sharpness during rendering of the mailing.
Icons **Note:** SWYN must be enabled for each symbol to be displayed in the mailing. The maximum width of the SWYN icons is 30 pixels, or 60 pixels if you select **High-resolution** for image quality.	
Facebook	Upload a custom Facebook icon or enter a URL pointing to your custom Facebook icon.
Twitter	Upload a custom Twitter icon or enter a URL pointing to your custom Twitter icon.
WhatsApp	Upload a custom WhatsApp icon or enter a URL pointing to your custom WhatsApp icon.

Parameter	Description
Email	Upload a custom email icon or enter a URL pointing to your custom email icon.
Xing	Upload a custom Xing icon or enter a URL pointing to your custom Xing icon.

Products

This paragraph type contains common fields to enter product details, such as old/current price, product category, description, and so on. You can define the order of these fields.

By default, no formatting is used in the designated fields. To format the text entered in these fields, use the editor's formatting tools. Or, if you use a content interface, commit HTML formatting tags.

Parameter	Description
Order	
Position 1	Enter a product name or title.
Position 2	Enter the product category, article group or genre. If you do not enter anything here, this position is not displayed.
Position 3	Enter an author, artist or manufacturer of the product or work. If you do not enter anything here, this position is not displayed.
Position 4	Enter a description of the product or work. If you do not enter anything here, this position is not displayed.
Position 5	Use this field in combination with the field **Current Price** for price reductions, bargains, special offers, and so on.
Position 6	Enter the current or new price here.

© Optimizely 2022

Content interface

This tab lets you define up to five alternative layouts for content of the content interface by freely inputting HTML or text. You can select the required layout from within the content interface paragraph.

Source text entered here is adopted into the newsletter with no additional checks.

Text and link formatting must be prepared in HTML format. You need HTML knowledge, particularly HTML in email, to create new layouts or edit the default one. Using corrupt or unsupported code may cause severe errors in the newsletter display.

Parameter	Description
Layout 1-5	
Desktop version	Enter the source text for the desktop version.
Mobile version	Enter the source text for the mobile version.
Text version	Enter the source text for the text version.

Inserting content

The following Velocity variables are available:

- **Status**. Information on current item paragraphs
- **Present**. For using queries that check for the presence of an element
- **Value**. For issuing the content

Notes for the creation of new layouts

- **Font definitions**. If you are using an alternative layout variant, font definitions must exist in the HTML you entered. The texts are not formatted by the Template Kit to give you complete freedom in visual design.
- **Widths**. Specify a fixed width or a width in percent. You should enter a percentage, because this prevents elements from sticking out of the layout.

- **Danger of display errors**. If you edit the layouts without in-depth knowledge of HTML, serious display errors may occur in your mailings.

Parameter	Default	Description
$first	Boolean	`true` if it is the first item in the content interface paragraph; otherwise `false`.
$index	Integer	The position of the item within the content interface paragraph as a number (1 for the first item, 2 for the second item...).
$last	Boolean	`true` if it is the last item in the content interface paragraph; otherwise `false`.

Variable	Type	Description
$text1Present	Boolean	`true` if content is present for the **Text 1** field; otherwise `false`.
$text2Present	Boolean	`true` if content is present for the **Text 2** field; otherwise `false`.
$text3Present	Boolean	`true` if content is present for the **Text 3** field; otherwise `false`.
$text4Present	Boolean	`true` if content is present for the **Text 4** field; otherwise `false`.
$text5Present	Boolean	`true` if content is present for the **Text 5** field; otherwise `false`.
$text6Present	Boolean	`true` if content is present for the **Text 6** field; otherwise `false`.
$text7Present	Boolean	`true` if content is present for the **Text 7** field; otherwise `false`.
$text8Present	Boolean	`true` if content is present for the **Text 8** field; otherwise `false`.

Variable	Type	Description
$text9Present	Boolean	`true` if content is present for the **Text 9** field; otherwise `false`.
$text10Present	Boolean	`true` if content is present for the **Text 10** field; otherwise `false`.
$link1TextPresent	Boolean	`true` if content is present for the **Text** field in the **Link 1** group; otherwise `false`.
$link1UrlPresent	Boolean	`true` if content is present for the **URL** field in the **Link 1** group; otherwise `false`.
$link2TextPresent	Boolean	`true` if content is present for the **Text** field in the **Link 2** group; otherwise `false`.
$link2UrlPresent	Boolean	`true` if content is present for the **URL** field in the **Link 2** group; otherwise `false`.
$link3TextPresent	Boolean	`true` if content is present for the **Text** field in the **Link 3** group; otherwise `false`.
$link2UrlPresent	Boolean	`true` if content is present for the **URL** field in the **Link 3** group; otherwise `false`.
$image1ImageUrlPresent	Boolean	`true` if content is present for the **Image** field in the **Image 1** group in the **Images** tab; otherwise `false`.
$image1AltTextPresent	Boolean	`true` if content is present for the **Alternative text** field in the **Image 1** group in the **Images** tab; otherwise false.
$image1LinkPresent	Boolean	`true` if content is present for the **Link** field in the **Image 1** group in the **Images** tab; otherwise `false`.
$image2ImageUrlPresent	Boolean	`true` if content is present for the **Image** field in the **Image 2** group in the **Images** tab; otherwise `false`.

Variable	Type	Description
$image2AltTextPresent	Boolean	`true` if content is present for the **Alternative text** field in the **Image 2** group in the **Images** tab; otherwise `false`.
$image2LinkPresent	Boolean	`true` if content is present for the **Link** field in the **Image 2** group in the **Images** tab; otherwise `false`.
$image3ImageUrlPresent	Boolean	`true` if content is present for the **Image** field in the **Image 3** group in the **Images** tab; otherwise `false`.
$image3AltTextPresent	Boolean	`true` if content is present for the **Alternative text** field in the **Image 3** group in the **Images** tab; otherwise `false`.
$image3LinkPresent	Boolean	`true` if content is present for the **Link** field in the **Image 3** group in the **Images** tab; otherwise `false`.
$image4ImageUrlPresent	Boolean	`true` if content is present for the **Image** field in the **Image 4** group in the **Images** tab; otherwise `false`.
$image4AltTextPresent	Boolean	`true` if content is present for the **Alternative text** field in the **Image 4** group in the **Images** tab; otherwise `false`.
$image4LinkPresent	Boolean	`true` if content is present for the **Link** field in the **Image 4** group in the **Images** tab; otherwise `false`.
$image5ImageUrlPresent	Boolean	`true` if content is present for the **Image** field in the **Image 5** group in the **Images** tab; otherwise `false`.
$image5AltTextPresent	Boolean	`true` if content is present for the **Alternative text** field in the **Image 5** group in the **Images** tab; otherwise `false`.
$image5LinkPresent	Boolean	`true` if content is present for the **Link** field in the **Image 5** group in the **Images** tab; otherwise `false`.

Variable	Type	Description
$image6ImageUrlPresent	Boolean	`true` if content is present for the **Image** field in the **Image 6** group in the **Images** tab; otherwise `false`.
$image6AltTextPresent	Boolean	`true` if content is present for the **Alternative text** field in the **Image 6** group in the **Images** tab; otherwise `false`.
$image6LinkPresent	Boolean	`true` if content is present for the **Link** field in the **Image 6** group in the **Images** tab; otherwise `false`.

Variable	Type	Environment	Description
$text1Value	String	Desktop, mobile, text	The unchanged content from the **Text 1** field.
$text1FormattedValue	String	Desktop, mobile	The edited content from the **Text 1** field.
$text1FormattedAsHeadlineValue	String	Desktop, mobile	The edited content from the **Text 1** field. The text is provided in the formatting for headings, and is linked to the URL for **Link 1**.
$text2Value	String	Desktop, mobile, text	The unchanged content from the **Text 2** field.
$text2FormattedValue	String	Desktop, mobile	The edited content from the **Text 2** field.
$text3Value	String	Desktop, mobile, text	The unchanged content from the **Text 3** field.

Variable	Type	Environment	Description
$text3FormattedValue	String	Desktop, mobile	The edited content from the **Text 3** field.
$text4Value	String	Desktop, mobile, text	The unchanged content from the **Text 4** field.
$text4FormattedValue	String	Desktop, mobile	The edited content from the **Text 4** field.
$text5Value	String	Desktop, mobile, text	The unchanged content from the **Text 5** field.
$text5FormattedValue	String	Desktop, mobile	The edited content from the **Text 5** field.
$text6Value	String	Desktop, mobile, text	The unchanged content from the **Text 6** field.
$text6FormattedValue	String	Desktop, mobile	The edited content from the **Text 6** field.
$text7Value	String	Desktop, mobile, text	The unchanged content from the **Text 7** field.
$text7FormattedValue	String	Desktop, mobile	The edited content from the **Text 7** field.
$text8Value	String	Desktop, mobile, text	The unchanged content from the **Text 8** field.
$text8FormattedValue	String	Desktop, mobile	The edited content from the **Text 8** field.

© Optimizely 2022

Variable	Type	Environment	Description
$text9Value	String	Desktop, mobile, text	The unchanged content from the **Text 9** field.
$text9FormattedValue	String	Desktop, mobile	The edited content from the **Text 9** field.
$text10Value	String	Desktop, mobile, text	The unchanged content from the **Text 10** field.
$text10FormattedValue	String	Desktop, mobile	The edited content from the **Text 10** field.
$link1TextValue	String	Desktop, mobile, text	The unchanged content from the **Text** field in the **Link 1** group.
$link1UrlValue	String	Desktop, mobile, text	The unchanged content from the **URL** field in the **Link 1** group.
$link1FormattedValue	String	Desktop, mobile	The edited content from the **Text** field in the **Link 1** group. The text is provided in the formatting for links, and is linked to the URL for **Link 1**.
$link2TextValue	String	Desktop, mobile, text	The unchanged content from the **Text** field in the **Link 2** group.
$link2UrlValue	String	Desktop, mobile, text	The unchanged content from the **URL** field

Variable	Type	Environment	Description
			in the **Link 2** group.
$link2FormattedValue	String	Desktop, mobile	The edited content from the **Text** field in the **Link 2** group. The text is provided in the formatting for links, and is linked to the URL for **Link 2**.
$link3TextValue	String	Desktop, mobile, text	The unchanged content from the **Text** field in the **Link 3** group.
$link3UrlValue	String	Desktop, mobile, text	The unchanged content from the **URL** field in the **Link 3** group.
$link3FormattedValue	String	Desktop, mobile	The edited content from the **Text** field in the **Link 3** group. The text is provided in the formatting for links, and is linked to the URL for **Link 3**.
$image1ImageUrlValue	String	Desktop, mobile	The image address of **Image 1**.
$image1AltTextValue	String	Desktop, mobile, text	The unchanged content from the **Alternative text** field in the **Image 1** group.
$image1LinkValue	String	Desktop, mobile, text	The unchanged content from the **Link** field in the **Image 1** group.

© Optimizely 2022

Variable	Type	Environment	Description
$image1FormattedValue	String	Mobile	The complete HTML source text from **Image 1** with alternative text and link. The image width is set to 100% (available width).
$image1FullFormattedValue	String	Desktop	The complete HTML source text from **Image 1** with alternative text and link. The maximum image width is the available paragraph width.
$image1HalfFormattedValue	String	Desktop	The complete HTML source text from **Image 1** with alternative text and link. The maximum image width is half of the available paragraph width.
$image2ImageUrlValue	String	Desktop, mobile	The image address of **Image 2**.
$image2AltTextValue	String	Desktop, mobile, text	The unchanged content from the **Alternative text** field in the **Image 2** group.
$image2LinkValue	String	Desktop, mobile, text	The unchanged content from the **Link** field in the **Image 2** group.
$image2FormattedValue	String	Mobile	The complete HTML source text from **Image 2** with alternative text and link. The

Variable	Type	Environment	Description
			image width is set to 100% (available width).
$image2FullFormattedValue	String	Desktop	The complete HTML source text from **Image 2** with altern-ative text and link. The maximum image width is the available para-graph width.
$image2HalfFormattedValue	String	Desktop	The complete HTML source text from **Image 2** with altern-ative text and link. The maximum image width is half of the available paragraph width.
$image3ImageUrlValue	String	Desktop, mobile	The image address of **Image 3**.
$image3AltTextValue	String	Desktop, mobile, text	The unchanged con-tent from the **Altern-ative text** field in the **Image 3** group.
$image3LinkValue	String	Desktop, mobile, text	The unchanged con-tent from the **Link** field in the **Image 3** group.
$image3FormattedValue	String	Mobile	The complete HTML source text from **Image 3** with altern-ative text and link. The image width is set to 100% (available width).

Variable	Type	Environment	Description
$image3FullFormattedValue	String	Desktop	The complete HTML source text from **Image 3** with alternative text and link. The maximum image width is the available paragraph width.
$image3HalfFormattedValue	String	Desktop	The complete HTML source text from **Image 3** with alternative text and link. The maximum image width is half of the available paragraph width.
$image4ImageUrlValue	String	Desktop, mobile	The image address of **Image 4**.
$image4AltTextValue	String	Desktop, mobile, text	The unchanged content from the **Alternative text** field in the **Image 4** group.
$image4LinkValue	String	Desktop, mobile, text	The unchanged content from the **Link** field in the **Image 4** group.
$image4FormattedValue	String	Mobile	The complete HTML source text from **Image 4** with alternative text and link. The image width is set to 100% (available width).
$image4FullFormattedValue	String	Desktop	The complete HTML source text from **Image 4** with alternative text and link. The

Variable	Type	Environment	Description
			maximum image width is the available paragraph width.
$image4HalfFormattedValue	String	Desktop	The complete HTML source text from **Image 4** with alternative text and link. The maximum image width is half of the available paragraph width.
$image5ImageUrlValue	String	Desktop, mobile	The image address of **Image 5**.
$image5AltTextValue	String	Desktop, mobile, text	The unchanged content from the **Alternative text** field in the **Image 5** group.
$image5LinkValue	String	Desktop, mobile, text	The unchanged content from the **Link** field in the **Image 5** group.
$image5FormattedValue	String	Mobile	The complete HTML source text from **Image 5** with alternative text and link. The image width is set to 100% (available width).
$image5FullFormattedValue	String	Desktop	The complete HTML source text from **Image 5** with alternative text and link. The maximum image width is the available paragraph width.

© Optimizely 2022

Variable	Type	Environment	Description
$image5HalfFormattedValue	String	Desktop	The complete HTML source text from **Image 5** with alternative text and link. The maximum image width is half of the available paragraph width.
$image6ImageUrlValue	String	Desktop, mobile	The image address of **Image 6**.
$image6AltTextValue	String	Desktop, mobile, text	The unchanged content from the **Alternative text** field in the **Image 6** group.
$image6LinkValue	String	Desktop, mobile, text	The unchanged content from the **Link** field in the **Image 6** group.
$image6FormattedValue	String	Mobile	The complete HTML source text from **Image 6** with alternative text and link. The image width is set to 100% (available width).
$image6FullFormattedValue	String	Desktop	The complete HTML source text from **Image 6** with alternative text and link. The maximum image width is the available paragraph width.
$image6HalfFormattedValue	String	Desktop	The complete HTML source text from **Image 6** with alternative text and link. The

Variable	Type	Environment	Description
			maximum image width is half of the available paragraph width.
$editBar	String	Desktop, mobile	Inserts the paragraph button bar. This is required to integrate the button bar into the table, such as when implementing adjacent items. If this variable is not available, the button bar is placed above the item.

Examples of alternative layout variants

The examples show the source text for the default layout and can be adapted for alternative layout variants.

Remove HTML comments, blank lines and spaces when transferring HTML into the Template Kit. If you do not do this, then these elements are included when sending, and will cause the newsletter source text to "swell".

```
<table width="100%" border="0" cellpadding="0" cellspacing="0">
    <tr>
        <td width="100%">
            #set($displaySeparator = false)
            #if("$text1Present" == "true")
                $text1FormattedAsHeadlineValue
                #set($displaySeparator = true)
            #end

            #if("$image1ImageUrlPresent" == "true")
                #if("$text1Present" == "true")
                    <table width="10" border="0" cellpadding="0" cellspacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
                    #set($displaySeparator = false)
```

```
                #end
                <table border="0" cellspacing="0" cellpadding="0" align="right">
                    <tr>
                        <td width="10"></td>
                        <td>
                            #if("$image1LinkPresent" != "true" &&
"$link1UrlPresent" == "true")
                                <a href="$link1UrlValue" target="_blank">
                            #end
                            $image1HalfFormattedValue
                            #if("$image1LinkPresent" != "true" &&
"$link1UrlPresent" == "true")
                                </a>
                            #end
                        </td>
                    </tr>
                </table>
            #end

            #if("$text2Present" == "true")
                #if($displaySeparator)
                    <table width="10" border="0" cellpadding="0" cellspacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
                #end
                $text2FormattedValue
                #set($displaySeparator = true)
            #end

            #if("$text3Present" == "true")
                #if($displaySeparator)
                    <table width="10" border="0" cellpadding="0" cellspacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
                #end
                $text3FormattedValue
                #set($displaySeparator = true)
            #end

            #if("$text4Present" == "true")
                #if($displaySeparator)
                    <table width="10" border="0" cellpadding="0" cellspacing="0">
                        <tr>
                            <td width="10" height="10"></td>
                        </tr>
                    </table>
                #end
                $text4FormattedValue
                #set($displaySeparator = true)
            #end
```

```
        #if("$text5Present" == "true")
            #if($displaySeparator)
                <table width="10" border="0" cellpadding="0" cellspacing="0">
                    <tr>
                        <td width="10" height="10"></td>
                    </tr>
                </table>
            #end
            $text5FormattedValue
            #set($displaySeparator = true)
        #end

        #if("$text6Present" == "true")
            #if($displaySeparator)
                <table width="10" border="0" cellpadding="0" cellspacing="0">
                    <tr>
                        <td width="10" height="10"></td>
                    </tr>
                </table>
            #end
            $text6FormattedValue
            #set($displaySeparator = true)
        #end

        #if("$text7Present" == "true")
            #if($displaySeparator)
                <table width="10" border="0" cellpadding="0" cellspacing="0">
                    <tr>
                        <td width="10" height="10"></td>
                    </tr>
                </table>
            #end
            $text7FormattedValue
            #set($displaySeparator = true)
        #end

        #if("$text8Present" == "true")
            #if($displaySeparator)
                <table width="10" border="0" cellpadding="0" cellspacing="0">
                    <tr>
                        <td width="10" height="10"></td>
                    </tr>
                </table>
            #end
            $text8FormattedValue
            #set($displaySeparator = true)
        #end

        #if("$text9Present" == "true")
            #if($displaySeparator)
                <table width="10" border="0" cellpadding="0" cellspacing="0">
                    <tr>
                        <td width="10" height="10"></td>
```

```
                </tr>
            </table>
        #end
        $text9FormattedValue
        #set($displaySeparator = true)
    #end

    #if("$text10Present" == "true")
        #if($displaySeparator)
            <table width="10" border="0" cellpadding="0" cellspacing="0">
                <tr>
                    <td width="10" height="10"></td>
                </tr>
            </table>
        #end
        $text10FormattedValue
        #set($displaySeparator = true)
    #end

    #if("$link1TextPresent" == "true" && "$link1UrlPresent" == "true")
        #if($displaySeparator)
            <table width="10" border="0" cellpadding="0" cellspacing="0">
                <tr>
                    <td width="10" height="10"></td>
                </tr>
            </table>
        #end
        $link1FormattedValue
        #set($displaySeparator = true)
    #end

    #if("$link2TextPresent" == "true" && "$link2UrlPresent" == "true")
        #if($displaySeparator)
            <table width="10" border="0" cellpadding="0" cellspacing="0">
                <tr>
                    <td width="10" height="10"></td>
                </tr>
            </table>
        #end
        $link2FormattedValue
        #set($displaySeparator = true)
    #end

    #if("$link3TextPresent" == "true" && "$link3UrlPresent" == "true")
        #if($displaySeparator)
            <table width="10" border="0" cellpadding="0" cellspacing="0">
                <tr>
                    <td width="10" height="10"></td>
                </tr>
            </table>
        #end
        $link3FormattedValue
        #set($displaySeparator = true)
    #end
```

```
        </td>
    </tr>
    <tr>
        <td width="100%" height="10"><!-- --></td>
    </tr>
</table>
```

```
#set($displaySeparator = false)
#if("$text1Present" == "true")
    $text1FormattedAsHeadlineValue
    #set($displaySeparator = true)
#end
#if("$image1ImageUrlPresent" == "true")
    #if("$text1Present" == "true")
        <div style="height: 10px;"></div>
        #set($displaySeparator = false)
    #end
    <div style="float: right; margin-left: 10px; max-width: 50%;">
        #if("$image1LinkPresent" != "true" && "$link1UrlPresent" == "true")
            <a href="$link1UrlValue" target="_blank">
        #end
        $image1FormattedValue
        #if("$image1LinkPresent" != "true" && "$link1UrlPresent" == "true")
            </a>
        #end
    </div>
#end
#if("$text2Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text2FormattedValue
    #set($displaySeparator = true)
#end
#if("$text3Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text3FormattedValue
    #set($displaySeparator = true)
#end
#if("$text4Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text4FormattedValue
    #set($displaySeparator = true)
#end
#if("$text5Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
```

```
    $text5FormattedValue
    #set($displaySeparator = true)
#end
#if("$text6Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text6FormattedValue
    #set($displaySeparator = true)
#end
#if("$text7Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text7FormattedValue
    #set($displaySeparator = true)
#end
#if("$text8Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text8FormattedValue
    #set($displaySeparator = true)
#end
#if("$text9Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text9FormattedValue
    #set($displaySeparator = true)
#end
#if("$text10Present" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $text10FormattedValue
    #set($displaySeparator = true)
#end
#if("$link1TextPresent" == "true" && "$link1UrlPresent" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $link1FormattedValue
    #set($displaySeparator = true)
#end
#if("$link2TextPresent" == "true" && "$link2UrlPresent" == "true")
    #if($displaySeparator)
        <div style="height: 10px;"></div>
    #end
    $link2FormattedValue
    #set($displaySeparator = true)
#end
#if("$link3TextPresent" == "true" && "$link3UrlPresent" == "true")
    #if($displaySeparator)
```

```
        <div style="height: 10px;"></div>
    #end
    $link3FormattedValue
    #set($displaySeparator = true)
#end
<div style="clear: both; height: 10px;"><!-- --></div>
```

```
#set($displaySeparator = false)#if("$text1Present" == "true")#if($dis-
playSeparator)
#end$!{null}$text1Value#set($displaySeparator = true)#end$!{null}#if
("$text2Present" == "true")#if($displaySeparator)
#end$!{null}$text2Value#set($displaySeparator = true)#end$!{null}#if("$tex-
t3Present" == "true")#if($displaySeparator)
#end$!{null}$text3Value#set($displaySeparator = true)#end$!{null}#if("$tex-
t4Present" == "true")#if($displaySeparator)
#end$!{null}$text4Value#set($displaySeparator = true)#end$!{null}#if("$tex-
t5Present" == "true")#if($displaySeparator)
#end$!{null}$text5Value#set($displaySeparator = true)#end$!{null}#if("$tex-
t6Present" == "true")#if($displaySeparator)
#end$!{null}$text6Value#set($displaySeparator = true)#end$!{null}#if("$tex-
t7Present" == "true")#if($displaySeparator)
#end$!{null}$text7Value#set($displaySeparator = true)#end$!{null}#if("$tex-
t8Present" == "true")#if($displaySeparator)
#end$!{null}$text8Value#set($displaySeparator = true)#end$!{null}#if("$tex-
t9Present" == "true")#if($displaySeparator)
#end$!{null}$text9Value#set($displaySeparator = true)#end$!{null}#if("$tex-
t10Present" == "true")#if($displaySeparator)
#end$!{null}$text10Value#set($displaySeparator = true)#end$!{null}#if("$link1Tex-
tPresent" == "true" && "$link1UrlPresent" == "true")#if($displaySeparator)
#end$!{null}$link1TextValue
$link1UrlValue#set($displaySeparator = true)#end$!{null}#if("$link2TextPresent"
== "true" && "$link2UrlPresent" == "true")#if($displaySeparator)
#end$!{null}$link2TextValue
$link2UrlValue#set($displaySeparator = true)#end$!{null}#if("$link3TextPresent"
== "true" && "$link3UrlPresent" == "true")#if($displaySeparator)
#end$!{null}$link3TextValue
$link3UrlValue#set($displaySeparator = true)#end$!{null}#if("$im-
age1ImageUrlPresent" == "true" && "$image1AltTextPresent" == "true"
    && ("$image1LinkPresent" == "true" || "$link1UrlPresent" == "true"))#if($dis-
playSeparator)
#end$!{null}$image1AltTextValue
#if("$image1LinkPresent" == "true")$image1LinkValue$!{null}#else$!
{null}$link1UrlValue#end#end$!{null}
```

RSS feeds

You can define one or more layout variants for RSS feed articles. Within the RSS feed paragraph you can select the layout to be used.

© Optimizely 2022

Source code entered in this tab is rendered into the newsletter without further checking. The formatting of text and links must be written in HTML code.

> **Warning:** You need knowledge of HTML and particularly of HTML in emails to setup this paragraph. Using corrupt or not supported code in a layout may cause severe errors in the newsletter display.

Parameter	Description
Placeholder for the RSS feed URL	
Value for {placeholder1}...Value for {placeholder1}	In the RSS feed paragraph, open the **RSS feed** tab and insert the placeholder {placeholder1}, {placeholder3} or {placeholder3} in the **URL** box. Before the RSS feed is retrieved, this placeholder is replaced with the value entered here.
Order (default layout)	
Position 1	Select the content to be displayed here.
Position 2	Select the content to be displayed here.
Position 3	Select the content to be displayed here.
Position 4	Select the content to be displayed here.
Layout 1-5	
Desktop version	Enter the source code for the desktop version of your newsletter.
Mobile version	Enter the source code for the mobile version of your newsletter.
Text version	Enter the source code for the text version of your newsletter.

© Optimizely 2022

Inserting content

Content from an RSS feed is present as velocity variables and can be inserted in the source text this way. These include

- status variables (information on current article paragraphs)
- present variables (for using queries that check the presence of an element)
- value variables (for releasing content)

Note: Important notes

- **Font definitions**. When using alternate layout options, font definitions must be set in your HTML. The Template Kit does not format the text, allowing you to choose a design. Conversely, this means that links in continuous text (if used) must be formatted accordingly in the RSS feed.
- **Width specifications**. RSS feed paragraphs may vary in width. When using an alternate layout, you should preferably only work with percentages, or not apply width specifications. Otherwise, you can work with fixed widths as long as the RSS feed paragraph is used in the same configuration, *or* a separate layout variant is defined for each different paragraph width.
- **Aspect ratio**. The Template Kit can only edit images to a limited degree if an alternative layout option is used (whatever content width is present is applied as the maximum width). You should provide images with the required width. Also, you can also scale the image by setting a specified width in HTML. This is not recommended, however, because some applications (such as Microsoft Outlook) ignore this information and display the image in its original size.
- **Link alignment/Image position**. These options are inoperative when using an alternative layout. The arrangement/positioning of elements is set by the HTML
- **Risk of display errors**. When manually entering HTML for desktop and mobile versions, make sure that the content displays properly in a variety of email programs and web mailers. Otherwise, this can lead to serious display errors.

Variable	Type	Description
rssItemFirst	Boolean	Is `true`, if it is the first article of the RSS feed paragraph, oth-erwise `false`.
rssItemIndex	Integer	Shows the position of the article within the RSS feed paragraph as a number (1 for the first article, 2 for the second article and so on).
rssItemLast	Boolean	Is `true`, if it is the last article of the RSS feed paragraph, oth-erwise `false`.

Variable	Type	Description
rssTitlePresent	Boolean	Contains `true`, if content is present for the **Title** box, otherwise `false`.
rssTextPresent	Boolean	Contains `true`, if content is present for the **Text** box, otherwise `false`.
rssAuthorPresent	Boolean	Contains `true`, if content is present for the **Author** box, otherwise `false`.
rssDatePresent	Boolean	Contains `true`, if content is present for the **Date** box, otherwise `false`.
rssCategoriesPresent	Boolean	Contains `true`, if content is present for the **Categories** box, otherwise `false`.
rssLinkTextPresent	Boolean	Contains `true`, if content is present for the **Text** box in the **Link** group, otherwise `false`.
rssLinkUrlPresent	Boolean	Contains `true`, if content is present for the **URL** box in the **Link** group, otherwise `false`.
rssCommentsLinkTextPresent	Boolean	Contains `true`, if content is present for the **Text** box in the **Link to the comments** group, otherwise `false`.

© Optimizely 2022

Variable	Type	Description
rssCommentsLinkUrlPresent	Boolean	Contains `true`, if content is present for the **URL** box in the **Link to the comments** group, otherwise `false`.
rssImageUrlPresent	Boolean	Contains `true`, if content is present for the **Image** box (Upload file) in the **Image** tab, otherwise `false`.
rssImageAltTextPresent	Boolean	Contains `true`, if content is present for the **Alternative text** box in the **Image** tab, otherwise `false`.
rssImageLinkPresent	Boolean	Contains `true`, if content is present for the **Link** box in the **Image** tab, otherwise `false`.

Variable	Type	Description
rssTitleValue	String	Text for the **Title** box.
rssTextValue	String	Text for the **Text** box.
rssAuthorValue	String	Text for the **Author** box.
rssDateValue	String	Text for the **Date** box.
rssCategoriesValue	String	Text for the **Categories** box.
rssLinkTextValue	String	Text for the **Text** box in the **Link** group.
rssLinkUrlValue	String	Text for the **URL** box in the **Link** group.
rssCommentsLinkTextValue	String	Text for the **Text** box in the **Link to the comments** group.
rssCommentsLinkUrlValue	String	Text for the **URL** box in the **Link to the comments** group.

© Optimizely 2022

Variable	Type	Description
rssImageUrlValue	String	Image URL (Upload Image) for the **Image** tab.
rssImageAltTextValue	String	Text for the **Alternative Text** for the **Image** tab.
rssImageLinkValue	String	Text for the **Link** box for the **Image** tab.
editBar	String	Inserts the button bar for the RSS feed article. This is necessary when placing articles side-by-side, for example, to integrate the button bar into the table. If this variable is not present, the button bar is placed above the article.

Example for an alternative layout

The example creates a two-columned layout using a width of 580 pixels.

> **Note:** Remove HTML comments, whitespaces, and blank lines when copying the HTML to the Template Kit. They may be sent along with the newsletter and, thus, expand the newsletter source code.

```
<!-- This query ensures that content is only displayed if the contents used for
this layout are available. -->
#if($rssTitlePresent || $rssImageUrlPresent || $rssAuthorPresent ||
$rssDatePresent || $rssTextPresent || ($rssLinkTextPresent &&
$rssLinkUrlPresent))
    <!-- To enable the two-column layout, a border table is opened in the first
RSS feed article. -->
    #if($rssItemFirst)
        <table border="0" cellpadding="0" cellspacing="0">
            <tr>
    #end

    <!-- For every article, a table cell with half the width is created. This
table cell contains the entire contents of the RSS feed item. -->
    <td width="280" align="left" valign="top">

        <!-- The button bar is placed here so it is displayed above the cor-
responding RSS feed article. -->
        $editBar
        #if($rssTitlePresent)
```

```
            <font size="2" face="Arial, sans-serif" color="#000001" style="font-
size: 14px;"><b>
                #if($rssLinkUrlPresent)
                    <a href="$rssLinkUrlPresent" style="color: #000001; text-dec-
oration: none;" target="_blank">
                #end
                    <font size="2" face="Arial, sans-serif" color="#000001" styl-
e="font-size: 14px;"><b>$rssTitleValue</b></font>
                #if($rssLinkUrlPresent)
                    </a>
                #end
            </b></font>
            <table width="100%" cellspacing="0" cellpadding="0" border="0">
                <tr>
                    <td width="100%" height="10"></td>
                </tr>
            </table>
        #end

        #if($rssImageUrlPresent)
            #if($rssImageLinkPresent)
                <a href="$rssImageLinkValue" target="_blank">
            #end
            #if(!$rssImageLinkPresent && $rssLinkUrlPresent)
                <a href="$rssLinkUrlValue" target="_blank">
            #end
            <!-- An image width of 130 pixels is specified. You should provide an
image that already have the required width. Otherwise it will be stretched or com-
pressed. -->
            <img src="$rssImageUrlValue" alt="$rssImageAltTextValue" width="130"
border="0" align="right" style="display: block; float: right;" />
            #if($rssImageLinkPresent || $rssLinkUrlPresent)
                </a>
            #end
        #end

        #if($rssAuthorPresent || $rssDatePresent || $rssTextPresent)
            <font size="1" face="Arial, sans-serif" color="#666666" style="font-
size: 11px;">
                #if($rssDatePresent || $rssAuthorPresent)
                    <span style="font-size: 10px;">
                        $rssDateValue
                        #if($rssDatePresent && $rssAuthorPresent)
                            |
                        #end
                        $rssAuthorValue
                    </span>
                    <table width="100%" cellspacing="0" cellpadding="0" bor-
der="0">
                        <tr>
                            <td width="100%" height="10"></td>
                        </tr>
                    </table>
                #end
```

```
                $rssTextValue
            </font>
        #end

        #if($rssLinkTextPresent && $rssLinkUrlPresent)
            <font size="1" face="Arial, sans-serif" color="#666666" style="font-
size: 11px; line-height: 11px;">
                &ndash;
                <nobr>
                    <a href="$rssLinkUrlValue" style="line-height: 11px; color:
#666666; text-decoration: underline;" target="_blank">
                        <font size="1" face="Arial, sans-serif" color="#666666"
style="font-size: 11px;">
                            <u>$rssLinkTextValue</u>
                        </font>
                    </a>
                </nobr>
            </font>
        #end
    <!-- After every first (left-aligned) RSS feed article, the table cell is
closed and a new one is opened. -->
    #if($rssItemIndex % 2 == 1)
        </td>
        <td width="20"></td>
    <!-- After every second (right-aligned) RSS feed article, the above opened
table is closed, some space is inserted and a table is opened. -->
    #else
                </td>
            </tr>
        </table>
        #if(!$rssItemLast)
            <table width="580" border="0" cellpadding="0" cellspacing="0">
                <tr>
                    <td width="580" height="20"></td>
                </tr>
            </table>
        #end
        <table border="0" cellpadding="0" cellspacing="0">
            <tr>
    #end

    <!-- After the last RSS feed article the table is closed. -->
    #if($rssItemLast)
            </tr>
        </table>
    #end

#end
```

Facebook

The Facebook paragraph contains a default layout for the visual design of Facebook articles. If you want, you can store up to 2 additional layouts as HTML code. You can select custom layouts from a drop-down list in the Facebook paragraph (see Facebook layouts).

> **Warning:** If you lack knowledge of HTML, CSS, and Velocity, contact customer support to edit the alternative layouts. If you edit them without in-depth knowledge, serious display errors may occur in your mailings.

Parameter	Description
Order (default layout)	
Position 1–3	Specify where to display the date, author, and text by selecting the desired option from the drop-down list. To specify distance between them, in the **General** tab under **Layout**, change the value of **Space between texts and images**.
Layout 1 and 2	
Desktop version	Enter the source code for the desktop version.
Mobile version	Enter the source code for the mobile version.
Text version	Enter the source code for the text version.

Twitter

The Twitter paragraph contains a default layout for the visual design of your Tweets. If you want, you can store up to 5 additional layouts as HTML code. You can select custom layouts from a drop-down list in the Twitter paragraph. (See Twitter layouts).

> **Warning:** If you lack knowledge of HTML, CSS, and Velocity, contact customer support to edit the alternative layouts. If you edit them without in-depth knowledge, serious display errors may occur in your mailings.

Parameter	Description
Order (default layout)	
Position 1 – 3	Specify where to display the date, author, and text by selecting the desired option from the drop-down list. To specify the distance between these information, in the **General** tab under **Layout**, change the value of the **Space between texts and images** box.
Layout 1 and 2	
Desktop version	Enter the source code for the desktop version.
Mobile version	Enter the source code for the mobile version.
Text version	Enter the source code for the text version.

Navigation menu

The navigation menu paragraph contains a default layout for the visual design of navigation menu. If you want, you can store up to 5 additional layouts as HTML code. You can select custom layouts from a drop-down list in the navigation menu paragraph. (see Navigation menu layouts).

> **Warning:** If you lack knowledge of HTML, CSS, and Velocity, contact customer support to edit the alternative layouts. If you edit them without in-depth knowledge, serious display errors may occur in your mailings.

Parameter	Description
Layout 1-5	
Desktop version	Enter the source code for the desktop version.
Mobile version	Enter the source code for the mobile version.
Text version	Enter the source code for the text version.

Structured data

Add structured data to your mailing to present the email more prominently and attractively in the recipient's inbox or to add additional functions. The recipient's email program must support structured data for this. If this is not the case, the structured data is ignored and the email is displayed regularly in the recipient's inbox.

Select the checkbox in the **Gmail Promotions tab** section to place the email prominently in the Gmail Promotions tab using structured data. Depending on the provided content, Gmail will add a company logo, an image banner, a coupon code and a timer to the email preview.

> **Note:** The structured data generated by Optimizely Campaign is in conformance with Gmail's specifications. However, Optimizely has no influence on how the structured data is ultimately interpreted in Gmail's inbox. For more information on the Gmail Promotions tab, see Gmail developer website.

Alternatively, you can enter structured data directly as JSON-LD script in the **JSON-LD source code** section. Note that no validation takes place and that even a small error in the JSON-LD source code can result in the structured data not being read. In any case, test the display in advance using a test dispatch.

Parameter	Description
Gmail Promotions tab	

Parameter	Description
Activate	Check to add structured data to your mailing. By clicking **Apply**, a yellow box at the top of the edit area labeled **Structured data is activated for this mailing** appears. Click **Display** to display the JSON-LD script in the head section of the HTML code. **Tip:** If you have knowledge of JSON-LD, you can use the code preview to review, copy, and modify the code in the **JSON-LD source code** section.
Start date	To promote a limited time offer, you must specify a start date. The start date must lie before the mailing's send date to ensure that Gmail considers the structured data. Use the indicated date format.
Start time	Define a start time. Use the time format *hh:mm:ss*.
End date	From the end date and end time, Gmail calculates the timer until the end of the offer. The end date must lie after the mailing's send date to ensure that Gmail considers the structured data. Use the indicated date format.
End time	Define the end time of the offer. Use the time format *hh:mm:ss*.
Time zone	Select the time zone to which your time specifications refer. Gmail uses this to calculate the end time for the recipient's time zone. Example: An offer that ends at 10:00 AM in the UK ends at 6:00 PM in Japan.
Logo	Upload your company logo. The logo will be displayed next to the mailing preview. Alternatively, you can enter an external URL where the logo can be found. Use a square image format with an image size of at least 40 x 40 pixels.
Coupon description	Enter a description to your coupon code. Example: *30% discount*.
Coupon code	Insert a coupon code or placeholder depending on how you generate the coupon code. For information on how to create and include coupon codes with Optimizely Campaign, see Coupon system.
Image	Upload an image that will be displayed below the text in the email preview. Altern-

Parameter	Description
	atively, you can enter an external URL where the logo is to be found. Use a rect-angular image format with an image size of at least 324 x 83 pixels.

Tracking

You can extend outgoing links with tracking parameters. With the help of web analytics software, you can use these parameters to analyze click behavior. You can define up to five tracking parameters. Each consists of a key (parameter name) and value.

Parameter	Description
Parameter 1-5	
Key	Enter the name of the parameter.
Value	Enter the value of the parameter (integer or string).

Text version

If you do not want to use the automatically generated text version, created from content you enter in the template editor, enter a text version for the complete newsletter. If you enable this option, no content is converted automatically into the text version.

Parameter	Description
Alternative text version	
Activated	By default, this check box is cleared, and the text version is created automatically. If you check this box, you must enter a text version manually in the field below. Otherwise, no text version is sent with your mailing.
Text	Enter the newsletter text. You cannot use HTML or other formatting in the text version. Only line breaks and special characters (such as ****** or ++++++) can be used to structure the newsletter.

Mobile

Activate an optimized version of your mailing for mobile devices. This version is sent together with the desktop version and displayed on smart phones and tablets.

Parameter	Description
General	
Activate mobile version	Check to create a mobile version of the newsletter. By default, newsletter content is included in the mobile version. For each paragraph, you can define whether it is displayed or omitted in the mobile version. Note that the size of each email that contains a mobile version will increase by approximately 50-100 KB.
Click profile	Select a click profile that is assigned to each recipient who clicks in the mobile version. Use the click profile to analyze the usage of the mobile version or to create target groups containing mobile users.
Activate link extension	If you want to track mobile version links separately so that they are available in advanced reports, check this box. If you do, an additional parameter **mobile** with a value of `1`is appended to mobile newsletter links. You can also use click profiles to achieve more convenient reporting.

Pre-header

The pre-header is the first text part of a newsletter, positioned above the content. In most cases, the pre-header presents a link similar to *If this message is not displayed correctly, click here*, which redirects to the online version of the newsletter. This is useful as many email programs and providers (such as Outlook, Hotmail, Gmail) block images by default. Other examples of pre-headers are an unsubscribe link, or a hint about adding the sender to the recipient's address book.

To insert a pre-header, click **New: Pre-Header** in the template editor. You can use several pre-headers and assign them to target groups to restrict the pre-header to certain recipient segments.

Change the settings described below as desired and confirm by clicking **Apply**.

General

Parameter	Description
Content	
Text	Enter the pre-header text, such as a reference and link to the online version.
Show in Online Version	Select to include this paragraph in the online version.
Show in Desktop Version	Select to include this paragraph in the desktop mailing.
Show in Mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in Text Version	Select to show the paragraph in the text version of the mailing.

Options

Use these settings to define a pre-header layout that is from the default newsletter settings.

Parameter	Description
Layout	
Width	Enter an integer value in pixels.
Alignment	Select a value from the drop-down list.
Background	To define the color, enter a hexadecimal value preceded by **#** (such as

Parameter	Description
Color	#000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Enter an integer value.
Mobile	
Width	Enter the width of the mobile newsletter in percentage.

Click profiles

Parameter	Description
Click Profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target Groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups.

Setting up a pre-header for emails

If a subscriber clicks the link to the online version or reloads the newsletter images (that is, right-mouse clicks the blocked images), these steps may result in a premature closing of the newsletter by deleting it or marking it spam.

During the first weeks of subscription, use a pre-header to ask recipients to add your mailing address to their email address book. If they do, email sent from known addresses is immediately displayed in full, including images, by many email programs and providers (such as Gmail, Hotmail, Outlook). Such recipients also see your newsletter in email preview.

Adding your mailing address to a subscriber's address book also improves deliverability, since the email program classifies your newsletter as trustworthy. This is also very important with regard to "smart mailboxes" that some email providers are using.

To implement a pre-header into your emails, select recipients, adapt the email's HTML code, and create a filter.

Selecting recipients

You should only send a pre-header to new subscribers. Recipients who have received your newsletter for a time may have already updated their address book, or might not want to. So, create a filter for the pre-header that selects recipients who registered for the newsletter in the last three to four weeks. Adjust the time period to the sending frequency of your newsletter. Send on a monthly basis instead of every week, or try 60 days.

Adapting the email

The pre-header should contain a short text, asking the recipient to take action:

```
Please add our mailing address "newsletter@example.com" to your address book!
```

Creating a filter

To show this text to newly-registered recipients only, create a new Field function using the filter, or use a script. For example, many email marketing programs support the Velocity scripting language, which lets you add logic to HTML code to perform recipient-dependent dynamisations.

Depending on how flexibly the pre-header is supposed to be used, fixed filters could be linked, or the filter and/or the registration period for the filter could be designed as selectable.

Adapting the text version

In the first line of the text version of the newsletter, you should also prompt subscribers to add the mailing address to their address book.

Testing your changes

1. Create an email address for testing.
2. Send an email to the address whose opt-in date falls within the relevant time period.

Header

By default, the header contains a text/image paragraph with a logo and issue number. Complete this information and upload your company logo.

- The newsletter contains only one header element.
- The header can contain several paragraphs.
- You can select the same paragraph types as in the content section.
- You can remove the header if not needed.

To add a new paragraph in the header, click **Header**; see Content paragraphs.

To define the layout and select other options, click **Header**; see Grouping paragraphs.

Footer

The footer usually contains contact and legal information and an imprint.

- You can add more paragraphs to the footer.
- The newsletter contains only one footer element.
- You can remove the footer if not needed.

To add a new paragraph in the footer, click **New: Footer Paragraph**; see Content paragraphs.

To define the layout and select other options in the footer, click **Footer**; see Grouping paragraphs.

Grouping paragraph

Grouping paragraphs serve to structure the newsletter, but do not contain any content. From a high-level perspective, a newsletter only contains pre-header, header, footer, and grouping paragraphs. You can add to a mailing several grouping paragraphs, then insert content paragraphs into them.

Each grouping paragraph can contain its own table of contents, or you can create one table of contents for all grouping paragraphs. Grouping paragraphs provide additional layout options, such as a sidebar.

- To add a grouping paragraph, click **New: Paragraph** then **Grouping Paragraph**. Configure it as described below.
- To add content to a grouping paragraph, click **New: Content Paragraph**, click a paragraph type, and edit it; see Content paragraphs.
- To add a new separator, click **New: Paragraph** then **Separator**. Configure the separator; see Separator paragraph. To add the separator to the newsletter, click **Apply**.

Main area

<table>
<thead>
<tr><th>Parameter</th><th>Description</th></tr>
</thead>
<tbody>
<tr><td colspan="2">Layout</td></tr>
<tr><td>Padding</td><td>Specify white space around the paragraph content. You can set white space separately for each page.

Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries:
10 = sides are uniform with 10 pixels of white space for the content
10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right
10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left
If the value is set to 0, then there will be no padding.</td></tr>
<tr><td>Space Between</td><td>Specify the space (vertical and horizontal) between content paragraphs within a</td></tr>
</tbody>
</table>

Parameter	Description
Content Paragraphs	grouping paragraph.
Border	
Show	Select if you want to apply a border around the grouping paragraph.
Border Width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Rounded Corners	**Show** must be selected for this parameter to be effective. The radius value is the same as the padding value set for this paragraph. If no padding value is set, a value of 10 pixels is assumed. If you select this option, only a single value for border width is used. If more than one value is defined, only the first one is used for all sides.
Background	
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Image	The correct display of background images is not supported by all email clients.

Parameter	Description
	So, the background image should contain no important information. If you use a background image, the parameters **Alignment** and **Repeat** become effective. Note that background images are only visible at the border areas and at free spaces. Otherwise, they are covered by content and other backgrounds.
Alignment	Only effective if a background image is uploaded. Sets the alignment for the whole newsletter. Alignment of the content elements is defined in the content paragraphs.
Repeat	Only effective if a background image is uploaded. Repeats the background image.
Background (mobile)	
Show Back-ground Image	Select this option to display the background image also in the mobile version of the newsletter.
Fit Background Image to Area	Select this option to automatically stretch or crop the background image to fill the entire paragraph area.

Sidebar

Optionally, grouping paragraphs can be displayed in a two-column layout, with a main area and a sidebar. The sidebar can contain the same content paragraphs as the main area.

Parameter	Description
Layout	
Show	Select to show a sidebar in this grouping paragraph.
Width	The value cannot exceed the total width of the content area.
Position	The sidebar may appear to the left or the right of the main area.

© Optimizely 2022

Parameter	Description
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Space Between Content Paragraphs	Specify the space (vertical and horizontal) between content paragraphs within a grouping paragraph.
Space Between Sidebar and Main Area	Specify the space between the sidebar and the main area.
Mobile	
Position	In the mobile version, the sidebar is positioned above or below the main area, due to the reduced available space. Select the desired position from the drop-down list. This option is only in effect if the mobile version is activated in the general settings.
Border	
Show	Select if you want to apply a border around the entire paragraph.
Border Width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries:

© Optimizely 2022

Parameter	Description
	• 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Rounded Corners	**Show** must be selected for this parameter to be effective. The radius value is the same as the padding value set for this paragraph. If no padding value is set, a value of 10 pixels is assumed. If you select this option, only a single value for border width is used. If more than one value for border width be defined, only the first one is assumed for all sides.
Background	
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Image	The correct display of background images is not supported by all email clients. So, the background image should contain no important information. If you use a background image, the parameters **Alignment** and **Repeat** become effective. Note that background images are only visible at the border areas and at free spaces. Otherwise, they are covered by content and other backgrounds.
Alignment	Only effective if a background image is uploaded. Sets the alignment for the whole newsletter. Alignment of the content elements is defined in the content paragraphs.
Repeat	Only effective if a background image is uploaded. Repeats the background

Parameter	Description
	image.
Background (Mobile)	
Show Back-ground Image	Select this option to display the background image also in the mobile version of the newsletter.
Fit Background Image to Area	Select this option to automatically stretch or crop the background image to fill the entire paragraph area.

Options

Parameter	Description
Layout	
Background Color (Outer Area)	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.

Click profiles

Parameter	Description
Click Profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target Groups	To show this paragraph to one or more target groups only, select them. If more

Parameter	Description
	than one target group is selected, just one must match (OR logic). See Target groups. **Note:** For paragraphs in the header and footer you cannot select target groups, because these elements are considered mandatory in every mailing.

Content paragraphs

Within your mailing's Grouping paragraphs, you can insert the following types of content paragraphs and fill them with content. To do this, click **New: Content Paragraph** and select the desired type.

- Product paragraph (legacy). Adds a paragraph with predefined fields for product details. See also: General settings.
- Product paragraph with content interface (legacy). Imports product data, such as offer texts and product images, from your webspace or server into the Template Kit.
- Content interface paragraph. Add items from your web shop to a mailing.
- Source code paragraph. Enter HTML and a separate text version.
- Text or image paragraph. Contains a text area and an image, which you can place relative to a text block and headline.
- Table of contents paragraph. Automatically creates a table of contents from the headlines of content paragraphs or a grouping paragraph. It is placed in content paragraphs in the newsletter. Content paragraphs excluded from the table of contents are ignored.
- Image bar paragraph. Create a vertical or horizontal image bar with up to 10 images. The images are scaled down automatically; so, the more images you include, the smaller each image is displayed.
- Separator paragraph. Only for structuring purposes; contains no content.
- RSS feed paragraph. Load content from an RSS feed into your mailing.
- Recommendations paragraph. Adds automatically generated individual recommendations for each recipient through a URL. You need a software that generates recommendations based on a recipient's actions.
- Facebook paragraph. Integrate current Facebook posts into your message.

- Twitter paragraph. Integrate current tweets into your message.
- Navigation menu. Creates navigation bars with links to landing pages or deep links.

Product paragraph (legacy)

Use the product paragraph to add items from your web shop to a mailing. The paragraph contains input fields for:

- Product name
- Description
- Category
- Old price
- Current price
- Manufacturer

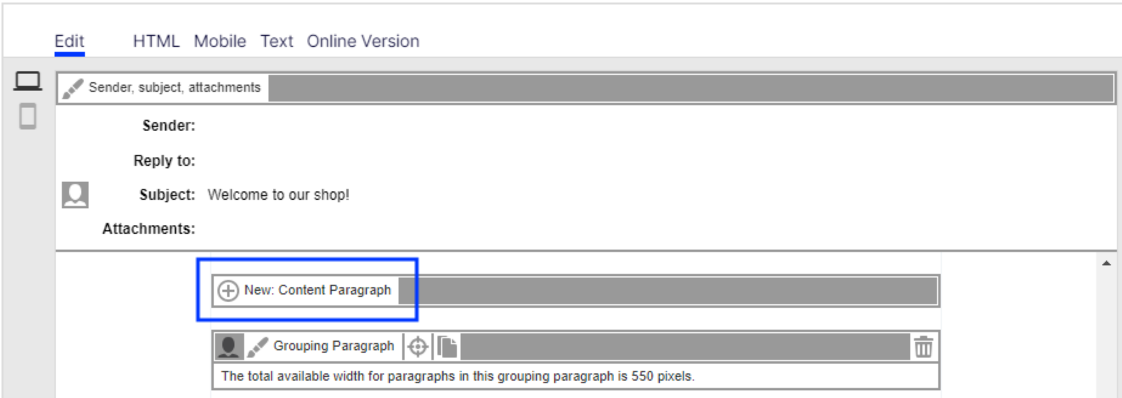
Define the order of the fields in the general settings. You can use your own categories instead of the standard categories. In this case, contact customer support before setting up the template.

Product paragraph fields have no formatting by default. To manually edit the paragraph, use the editor. Or, when using a content interface, use HTML, which can be transferred together with the contents.

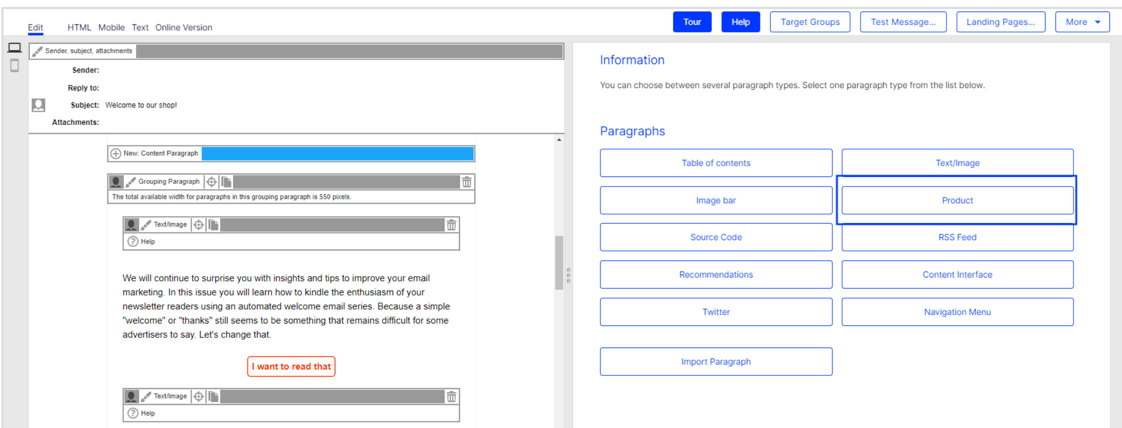
Creating a product paragraph

1. While editing the mailing content in the Template Kit, click **New: Content Paragraph**.

    > **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.



2. Click **Product**.



3. In the configuration window, click **Apply**. The new product paragraph appears in the preview window on the left.

Configuring a product paragraph

1. On the left, in the menu bar of the product paragraph, click **Product**. The configuration window opens on right.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.
   - General
   - Image
   - Button

- SWYN
- Options
- Click profiles
- Target groups

General

Parameter	Description
Content	
Heading	Enter a heading for this paragraph.
Name	Enter a product title or a work title.
Category	Enter a product category or a genre.
Author/Artist/Manufacturer	Enter the name of the author, artist, or manufacturer.
Text	Enter a product description or an abstract of a work.
Old Price	If you want to create a promotional campaign, a bargain, or a special offer, enter product's old price.
Current Price	Enter the product's current price.
Show in Desktop Version	Select to include this paragraph in the desktop mailing.
Show in Mobile Version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in Text Version	Select to show the paragraph in the text version of the mailing.
Link	
Text	Text entered here is linked to the URL below.

Parameter	Description
URL	This could be a landing page or a product details page from your web shop.
Alignment	The link can be aligned right, left, or center.

Image

Parameter	Description
Image	Upload an image or enter an image URL in the field **Alternatively External URL** that points to the image file.
Alternative Text	This text is displayed if a recipient blocks or disables images in the email client, or if the image cannot be displayed for another reason. Enter alternative text containing a short description or title for the image.
Link	You can link the image to a landing page or a page on your verbosity you entered a text link in this paragraph, you should use the same link for the image.
Subtitle	Enter an optional image subtitle.
Position	You can place the image in a separate column next to the heading and text block, or in a separate column next to the text block but below the headbanging most cases, these positions are recommended. If you use large images that cover the entire width of a paragraph or area, center them below the heading, the text, or the link.

Button

See Click2Go.

SWYN

You can enable the SWYN function for social networks individually for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her

© Optimizely 2022

Parameter	Description
	Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
WhatsApp	
Parameters for WhatsApp are identical to Twitter's.	
Email	
Show	Lets recipients share the paragraph via email.
Title	Displays up to 50 characters as email subject if the recipient shares the paragraph via email. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph via email. If you enter nothing here, the standard text is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Xing	
Parameters for Xing are identical to Twitter's.	

Options

For each content paragraph, you can define a layout that is different from the general newsletter layout.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Background Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Border	
Show	Check to apply a border around the paragraph.

Parameter	Description
Border Width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Table of Contents	
Show in Table of Contents	Select to display the paragraph in the table of contents for the section.
Alternative Table of Contents Entry	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click Profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target Groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups.

Product paragraph with content interface (legacy)

> **Note:** During setup, tell customer support the directory on your web space or your server where you will store your product data. This directory must allow HTTP requests. If the product data directory is only accessible with authentication, disable the authentication. If desired, you can only allow specific IP addresses to access product data.

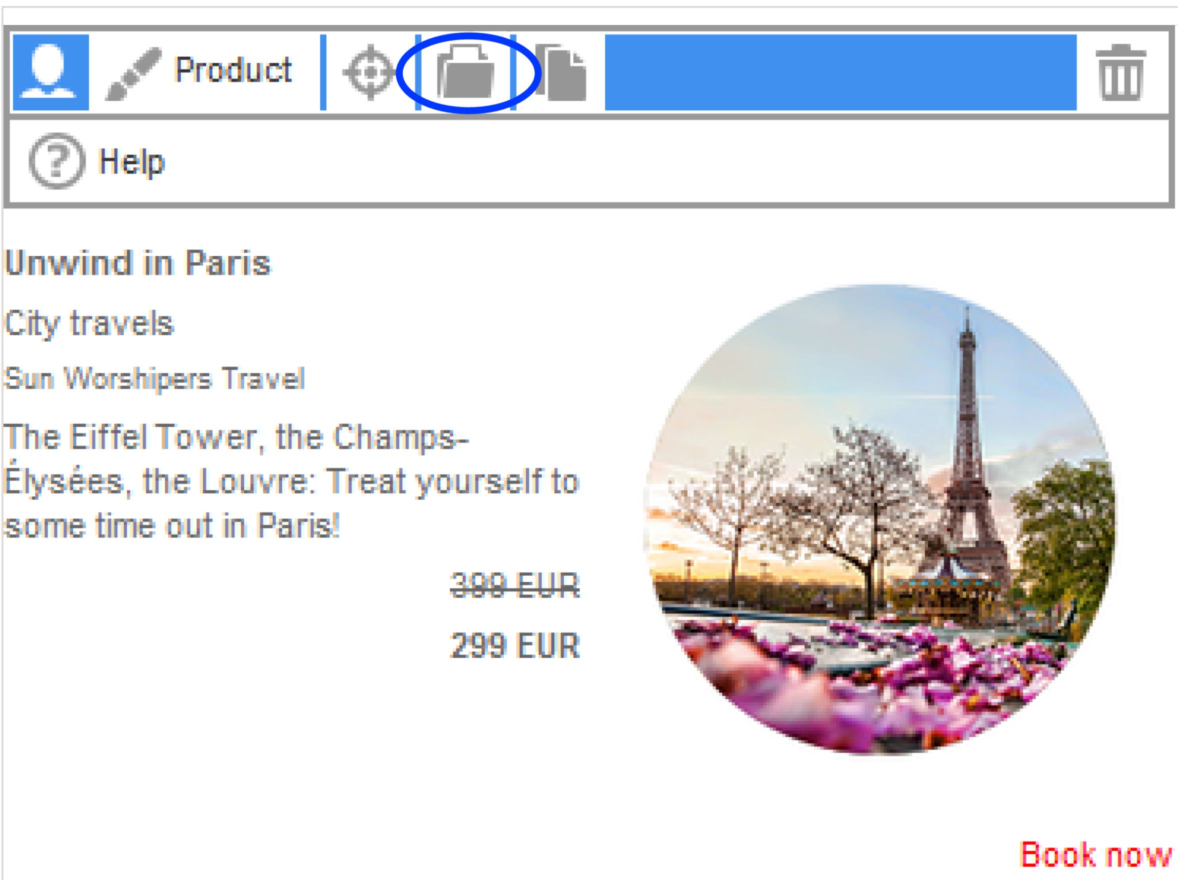
The product paragraph with content interface imports product data, such as offer texts and product images, from your web space or server to the Template Kit. It lets you create product offers in your merchandise management system then transfer them to the Template Kit. You can recommend products, offer discounts, provide notifications of new releases, create a new product paragraph, and import product offers with just a few clicks.

You can store product data statically as XML files on your server, have your server dynamically generate XML files as requested by the content interface. Optimizely Campaign retrieves your product data and makes it available to your messages.

> **Tip:** The content interface paragraph is the further development of the product paragraph with content interface and supports both CSV and XML formats.

Configuring the content interface

When the feature is enabled, a new button with a folder icon appears on the menu bar of the product paragraph.

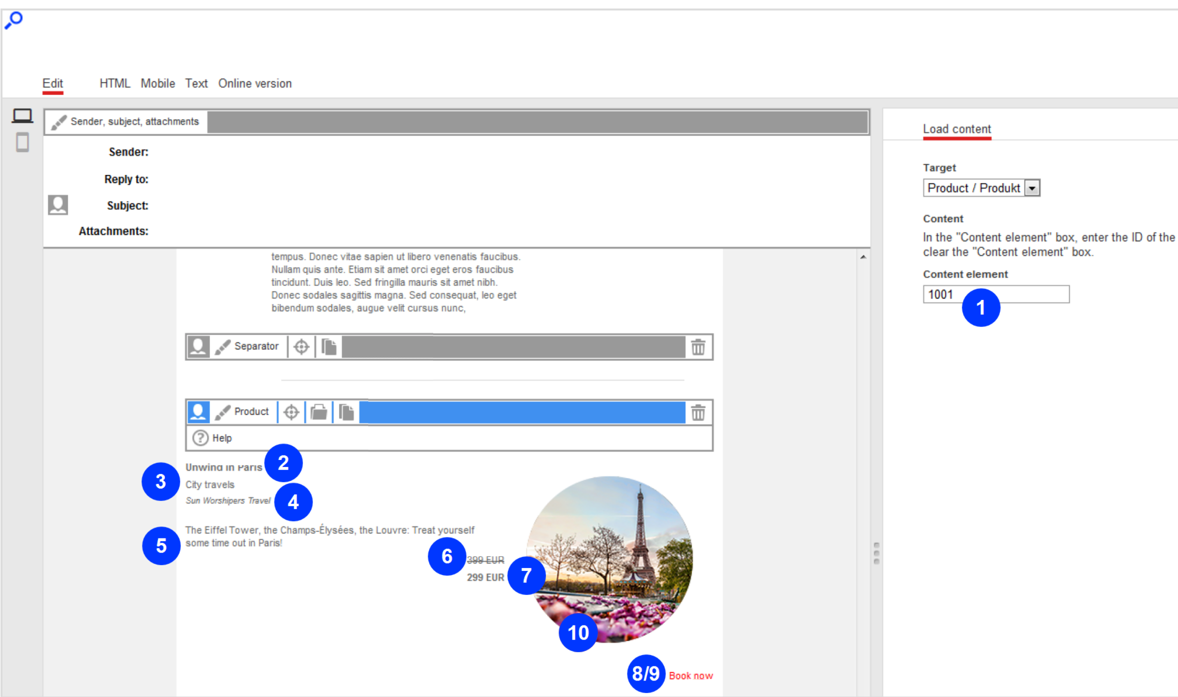


Default values

The product paragraph can load the following product data through the content interface:

1. unique ID
2. name
3. category
4. authors/performers/manufacturers/providers
5. description
6. old price
7. current price
8. URL link to the product, such as in your web shop
9. text label for the URL link, for example, "Book now"
10. an image URL, for displaying a product image

The following image shows the individual components of a sample product offer.



Making product data available as XML

An HTTP request is used to load product data from your web space or server to the Template Kit and start the import into Optimizely Campaign.

When the request is made, your product data must:

- exist on your web space or server as an XML file (static product data)

  or

- be generated dynamically in an XML format (dynamic product data)

> **Tip:** Your company's environment determines whether you import static or dynamic product data. Contact your system administrator to learn which implementation is in use.

Saving static product data as XML on the server

To save product data statically as XML files on your webspace or server, each product must be saved in an XML file. You cannot group multiple products into a single XML file. To save a product as an XML file, perform the following steps.

1. Open a text editor, such as Notepad (Windows) or Textedit (macOS/OS X).
2. Create a new document.

   > **Warning:** Set your text document to use UTF-8 character encoding. If you use another encoding, the text may not be represented properly.

3. Copy the following code into the document.
   Code sample

```
<element>
<property name="id"><![CDATA[123456]]></property>
<property name="name"><![CDATA[Name]]></property>
<property name="category"><![CDATA[Category]]></property>
<property name="manufacturer"><![CDATA[Author/Artist/Man-
ufacturer]]></property>
<property name="text"><![CDATA[Product description]]></property>
<property name="oldPrice"><![CDATA[<s>EUR 29.99</s>]]></property>
<property name="currentPrice"><![CDATA[<b>EUR 19.99 EUR</b>]]></property>
<property name="linkText"><![CDATA[Add to shopping cart]]></property>
<property name="linkUrl"><![CDATA[http://www.ex-
ample.com/product/123456]]></property>
<property name="imageUrl"><![CDATA
```

© Optimizely 2022

```
[http://img.example.com/product/123456.jpg]]></property>
</element>
```

> **Tip:** The following steps guide you through customizing this code for your setup. Only product ID (in code, the property **id**) and product name (in code, the property **name**) are mandatory. Other values are optional. Delete any unused values.
>
> Example: You do not want to specify product manufacturer, so delete the following line:
>
> ```
> <property name="manufacturer"><![CDATA[Author/Artist/Man-
> ufacturer]]></property>
> ```
>
> Alternatively, leave unneeded lines of code empty. For example, you want to enter the information later. If you do not want to specify the product manufacturer and want to leave the code in the document, the line looks like this:
>
> ```
> <property name="manufacturer"><![CDATA[]]></property>
> ```

> **Tip:** You can use HTML source code in these properties: **name**, **category**, **manufacturer**, **text**, **oldPrice**, **currentPrice**. For example, you want to insert links into the product description.

4. In the first property row, enter the product ID between the square brackets after **CDATA**.

   Example: The product ID is `ParisTrip01`.

   ```
   <property name="id"><![CDATA[ParisTrip01]]></property>
   ```

   > **Note:** Use only alphanumeric characters (letters and numbers) in the product ID. If you use special characters, you may encounter problems importing product data.

5. In the second property line, enter the product name between square brackets after **CDATA**.

```
<property name="name"><![CDATA[Unwind in Paris]]></property>
```

6. In the third property line, enter the product category between square brackets after **CDATA**.

```
<property name="category"><![CDATA[City travels]]></property>
```

7. In the fourth property line, enter the product manufacturer (or, depending on product, author, artist, operator, manufacturer, and so on) between square brackets after **CDATA**.

```
<property name="manufacturer"><![CDATA[Sun Worshipers Travel]]></property>
```

8. In the fifth property line, enter the product description, for example text and a website link, between the square brackets after **CDATA**.

```
<property name="text"><![CDATA[Eiffel Tower, Champs-Élysées, Louvre: Treat
yourself to some time out in Paris!”]]></property>
```

9. In the sixth property line, enter the product 's old price between `<s>` and `</s>`.

```
<property name="oldPrice"><![CDATA[<s>EUR 399</s>]]></property>
```

> **Note:** The old price is crossed out by default. To omit the strike-through in your communications, delete `<s>` and `</s>`.

10. In the seventh property line, enter your product's current price between `<b>` and `</b>`.

```
<property name="currentPrice"><![CDATA[<b>EUR 299</b>]]></property>
```

> **Note:** By default, the current price is displayed in bold. To omit the bold, delete `<b>` and `</b>`.

11. In the eighth property line, enter a text label for a product link between the square brackets after **CDATA**.

```
<property name="linkText"><![CDATA[Book now]]></property>
```

12. In the ninth property line, enter the URL link to your product between the square brackets after **CDATA**.

    ```
    <property name="linkUrl"><![CDATA[http://www.sonnen-
    hungrig.com/paris]]></property>
    ```

13. In the tenth property line, enter the URL to your product image between the square brackets after **CDATA**.

    ```
    <property name="imageUrl"><![CDATA[http://www.sonnen-
    hungrig.com/eiffeltower.jpg]]></property>
    ```

14. Save the text document. For the file name, use the product ID (the value you inserted for the **id** property). For file type. use .xml.
15. Delete the document's file extension. For example, if the document is named `ParisTrip01.xml`, rename the file as `ParisTrip01`.

    > **Warning:** If you do not remove the file extension, your product data cannot be loaded.

16. Save the document in your webspace or on your server in the directory that you communicated for the setup of the product paragraph with content interface.

    > **Warning:** Do not change the location of the product description documents without consulting customer support. If you change directories without consulting customer support, you cannot load product data using the content interface.

    After saving these documents, you can access your product offer in the Template Kit. Follow the steps in Load and edit product data to upload your product offer into the Template Kit using the content interface.

Generating dynamic product data on the server

XML files are not prepared manually, but are loaded from a database when requested (by HTTP request) via the content interface and automatically generated as XML. If you want to generate dynamic product data, see your system administrator.

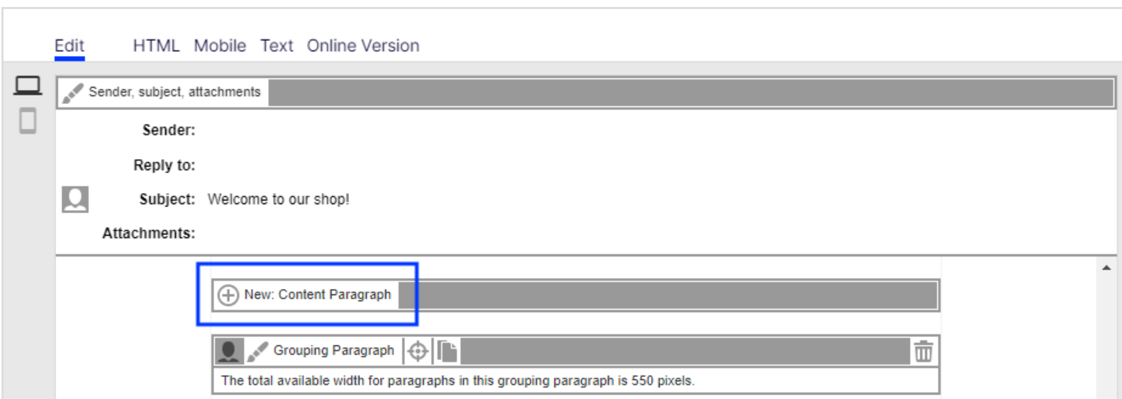
© Optimizely 2022

Loading and editing product data

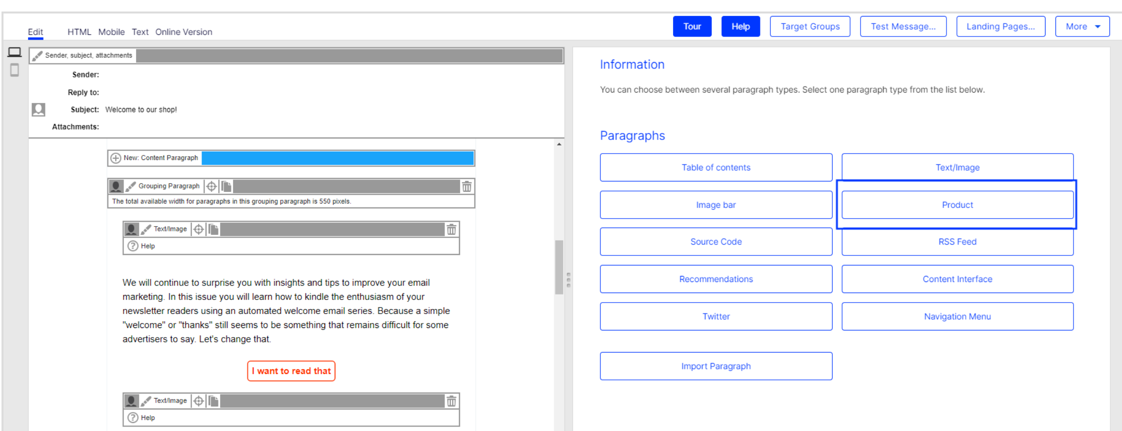
After product data is made available as XML files in your webspace or on your server, and customer support has stored your data source in your client, you can load product data into the Template Kit. After the import is complete, you can edit the data in the Template Kit using the content interface.

Loading product data

1. In the Template Kit, click **New: Content Paragraph**.



2. Click **Product**.



3. In the configuration window, change no settings and click **Apply**. The new product paragraph appears on the left, in the preview window.
4. In the menu bar of the new product paragraph, click **Content Interface** .
5. In the **Content element** box, enter the ID of the product offer that you want to load into the Template Kit.
6. On the bottom right of the window, click **Apply**. When the import is completed, the product offer appears on the left of the preview window.

Editing product data

If product offers were loaded from your webspace or server via the content interface into the Template Kit, you can edit them there. The steps for doing this are the same as those processing product paragraphs needing an extension through the content interface. See Product paragraph.

> **Tip:** If you use product paragraphs with an extension through the content interface, you should make changes to product offers in your system and update the product paragraphs in the Template Kit by loading the changes. This ensures that your product offers are up to date and that no outdated, modified content is loaded into the Template Kit later. To update a product paragraph, click **Content interface** in the menu bar of the product paragraph, then **Apply**.

> **Warning:** The product paragraph with the content interface can be configured by customer support so that your product offers are automatically updated on the ship date. This option is useful if your products' prices often change between the time of message creation and shipping. If this option is configured for you, any changes to your product offers must be made on your system. If you only perform changes in the Template Kit, they are overwritten on the shipping date with the old content from your webspace or server.

Editing HTML layouts

The product paragraph with the content interface provides a default layout for formatting offer text and images.

> **Note:** To receive an alternate layout customized to your products and services, contact customer support.

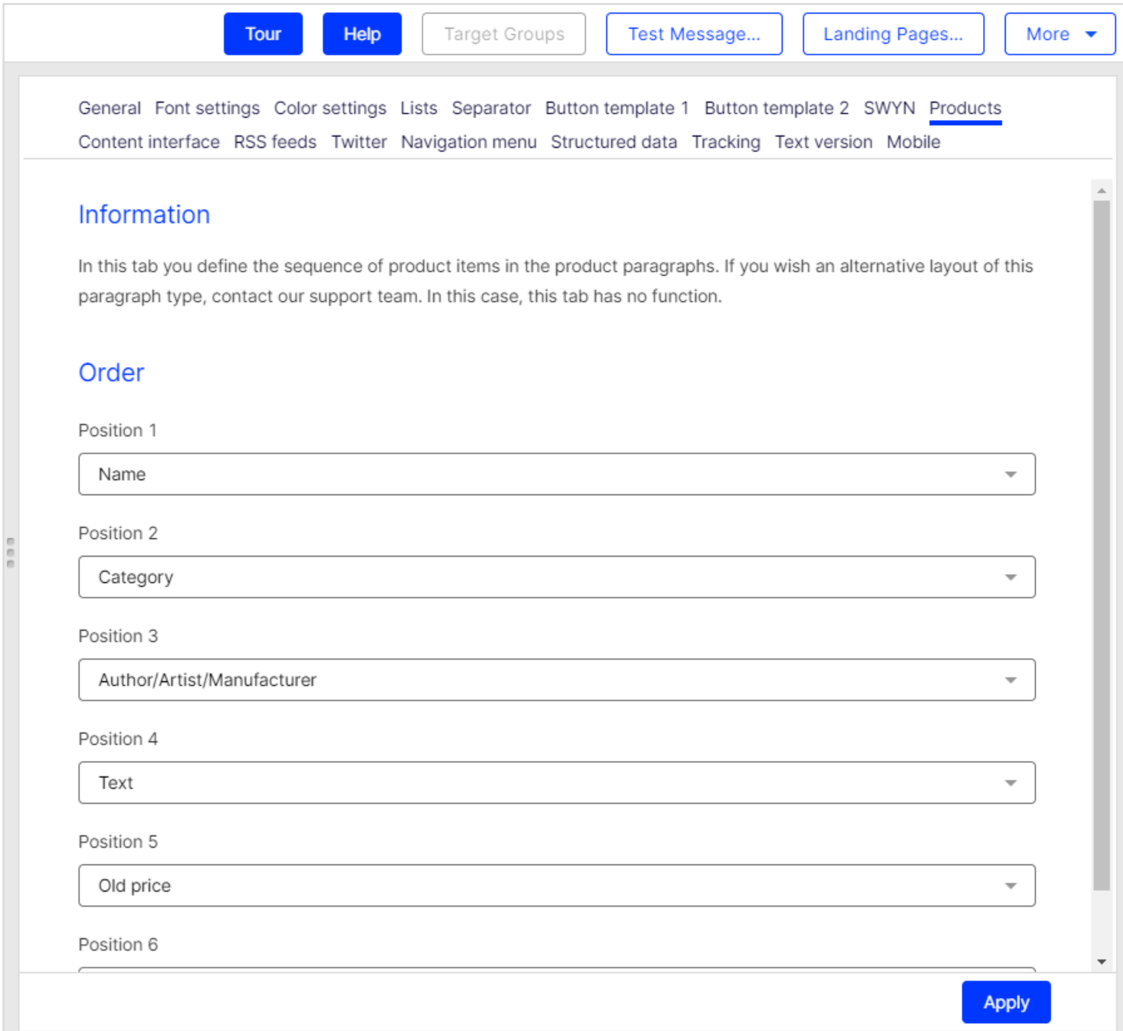
Standard layout

You can change the order of components in your product offer in the default layout. For example, you can determine whether the current price should be shown first followed by the old one, or whether the product manufacturer should appear before the product category.

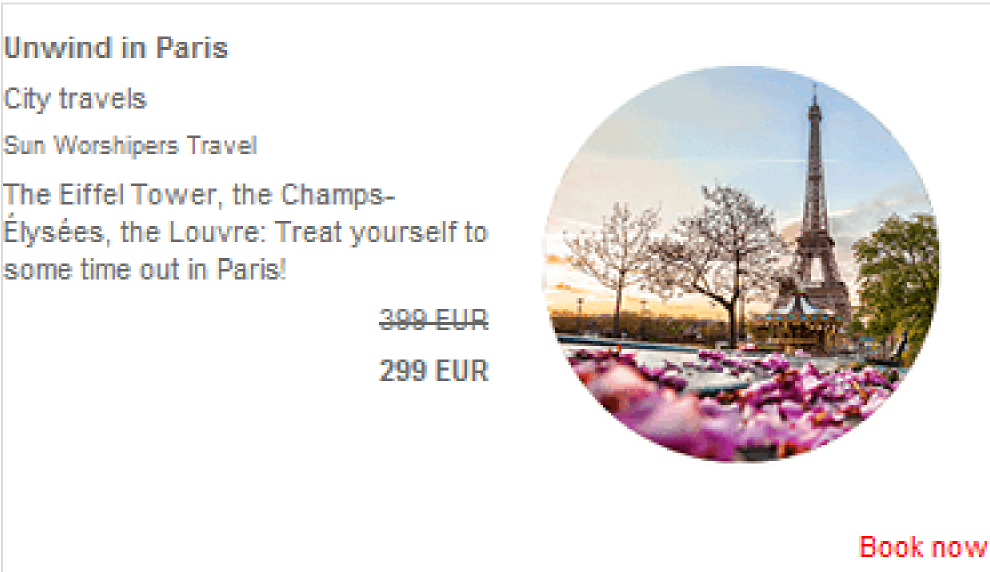
To change the order of product offer components in a default layout, perform the following steps:

1. In the Template Kit, click **Settings**. The settings window opens on the right.
2. Click the **Products** tab.
3. In the **Order** area, determine the order of product offer components by selecting from

drop-down lists.



Standard layout example



Alternate Layout

If customer support sets up an alternate layout, product offers are formatted according to its specifications. You cannot change the order of components in an alternate layout. To change an alternate layout, contact customer support.

> **Tip:** If an alternate layout is set up, you cannot access the default layout.

Alternate layout example

Troubleshooting

This topic describes how to troubleshoot common errors that can arise while working with the product paragraph with content interface.

Issue	Possible cause	Solution
Product data not loading	Product ID is entered incorrectly.	Enter the correct product ID.
Product data not loading	XML file has a file extension.	Remove the file extension.
Product data not loading	Corresponding product offer no longer exists on your webspace or server.	Save the product offer again on your webspace or server.
Product data not loading	Product data saved in wrong directory on server or webspace.	Transfer the product data you are trying to load to the directory indicated when setting up the content interface.
Product data not load-	Directory in which the	• Check whether the directory is reach-

Issue	Possible cause	Solution
ing	product data is stored is not available.	able only after prior authentication and disable authentication. • Check whether there is a problem with your server or webspace. Try loading product data again later.
Some content not loading. For example, the product image is missing.	Error in XML code you generated.	Correct the XML code.
Special characters not displayed correctly, such as German umlauts.	Incorrect character encoding in XML.	Set encoding of XML file to UTF-8.

Tip: If the problem continues after you try all suggested solutions, contact customer support.

Content interface paragraph

Note: To enable this feature, contact customer support.

The content interface paragraph imports product data, such as offer texts and product images, from your e-commerce system into the Template Kit. Whether Optimizely Commerce, Magento, in-house software development by your company, or another system, the content interface paragraph is flexible and supports a variety of data sources.

Tip: To learn about importing Optimizely Commerce catalog data, see Exporting Optimizely Commerce catalog data to Optimizely Campaign.

The technical implementation supports the open XML standard and CSV file format – many data sources support both formats.

Export product data from your data source and let Optimizely Campaign process it. In the Template Kit, create a new content interface paragraph with individual items, then import your current product offering with just a few mouse clicks.

Your data source can handle product data either by:

- saving it as static XML files on your webspace or server
- your server generating dynamic XML files when queried
- saving product data as a CSV file on the server (both manually or automatically)

> **Tip:** The content interface paragraph is the further development of the product paragraph with a content interface and supports both CSV and XML formats. You can use both file formats together.

Static and dynamic content

The content interface paragraph supports static and dynamic content.

- **Static content**. Product data is loaded when you create the mailing. The data can then be edited. If you integrate static content, all recipients receive the same content.
- **Dynamic content**. The content is loaded when the message is being sent. You cannot edit content in advance. However, you can send different product recommendations to each recipient. For more information, see Dynamic CSV and XML articles.

> **Tip:** You can use static content with dynamic content in the same mailing. Customer support can advise you about combining content types.

Paragraph types

There are four paragraph types. Only types enabled in your client appear in the Template Kit.

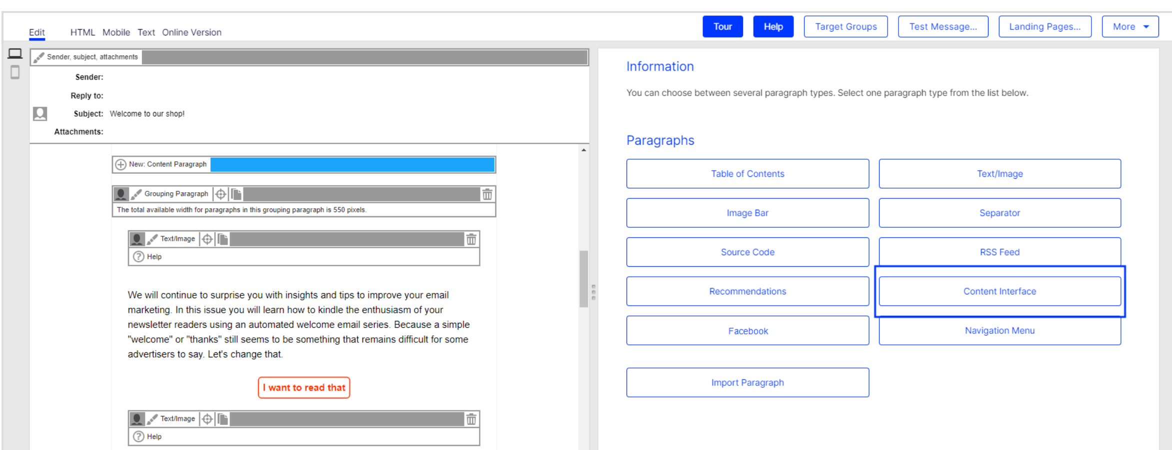
- Static CSV article
- Static XML article
- Dynamic CSV article
- Dynamic XML article

Setting up the content interface paragraph

To set up the content interface paragraph, provide customer support with the following information:

- XML or CSV, or XML and CSV together: Which format do you want for product data?
  - **XML**. In which directory on your webspace or server will you store product data? That directory must allow HTTP requests. If the directory is only accessible with authentication, disable it. You can restrict access to product data to specific IP addresses.
  - **CSV**. What will you call the CSV file to which your product catalog is saved? If you update the product catalog later, you must save that version of the CSV under the name given when setting up the content interface.
- Static content, dynamic content or a combination of both content types: Do you want to send the same content or customized product recommendations to your recipients?

After setup, the **Content Interface** paragraph type is available in the Template Kit.



Updating mailing content prior to dispatch

> **Note:** To enable this feature, contact customer support.

Days may pass between a mailing's creation date and its dispatch date. This delay can cause content to be out-of-date, such as a product that is no longer available.

This add-on verifies the imported content in the mailing when it was created. Product information is validated with the help of a unique product ID. Also, if a product is not available at dispatch, or if some information is incorrect, the add-on pauses sending.

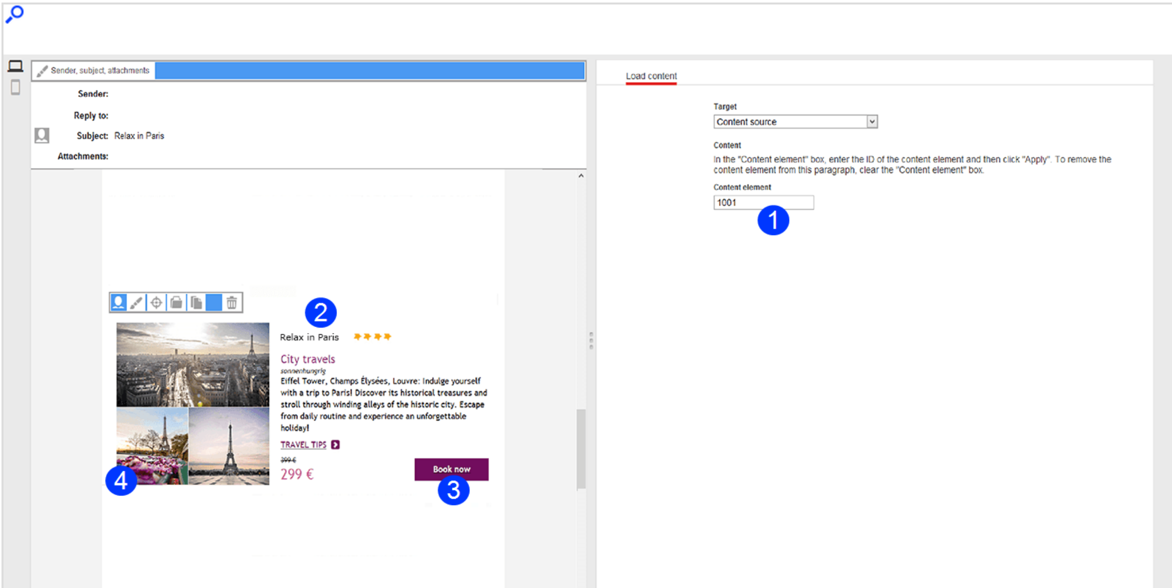
Standard values of a product offer

The content interface paragraph can load the following product data:

1. the product’s unique ID (not displayed in the message)
2. up to 10 text elements per product offer, in which you can enter the heading for a product offer, the product description, or the product price
3. up to 3 text links per product offer, such as calls to action (*Buy now*, *Learn more*, and so on)
4. up to 6 product images per product offer (by entering a URL)
    - up to 6 links to product images (one link per image) that direct the recipient to additional information by clicking the image
    - up to 6 alternative texts for product images in case a recipient cannot load product images and to support accessible messages

> **Note:** You can also transfer up to 20 additional datasets as metadata for HTML layout program logic.

The following image shows the components of your product offer.



Exporting product data with a CSV file

If you select CSV format, your product data is prepared in two steps:

1. Export product data from your e-commerce system or another data source into a CSV file.
2. Move the CSV file to your personal directory on the server. Optimizely Campaign retrieves the CSV file then makes its product data available in the Template Kit.

> **Tip:** If you have a personal directory on the server but no login information, contact customer support to set up a user account.

Export product data from your system as a CSV file. CSV files exported from different systems can differ widely. For example, names and column heading order can be different. Such differences can create problems when importing product data. If no information is provided about what the dataset columns contain (for example, the column that contains the product name), Optimizely Campaign cannot read the CSV file properly nor correctly classify the individual datasets.

But, if you use an Optimizely integration for one of these e-commerce systems, the content interface can recognize CSV files with different structures and process them correctly :

- Magento

If you use Optimizely integration with one of these systems, you can export product data using the Optimizely plug-in with no adjustment.

> **Note:** If you do not use an Optimizely integration, you must use Optimizely Campaign's generic CSV structure.

Generic CSV structure

Optimizely Campaign's generic CSV structure standardizes the structure and naming of column headings in CSV files, ensuring the correct import of product data.

If your system/your data source has a feature that supports the export of datasets to a CSV file (such as a plug-in), configure the CSV file with the following structure and column headings:

```
"id";"name";"category";
"text1";"text2";"text3";"text4";"text5";
"text6";"text7";"text8";"text9";"text10";
"link1Text";"link1Url";
"link2Text";"link2Url";
"link3Text";"link3Url";
"image1ImageUrl";"image1AltText";"image1Link";
"image2ImageUrl";"image2AltText";"image2Link";
"image3ImageUrl";"image3AltText";"image3Link";
"image4ImageUrl";"image4AltText";"image4Link";
"image5ImageUrl";"image5AltText";"image5Link";
"image6ImageUrl";"image6AltText";"image6Link";
"addi-
tion-
alData1";"additionalData2";"additionalData3";"additionalData4";"additionalData5";

"addi-
tion-
alData6";"ad-
ditionalData7";"additionalData8";"additionalData9";"additionalData10";

"addi-
tion-
alData11";"ad-
ditionalData12";"additionalData13";"additionalData14";"additionalData15";

"addi-
```

```
tion-
alData16";"ad-
ditionalData17";"additionalData18";"additionalData19";"additionalData20";
```

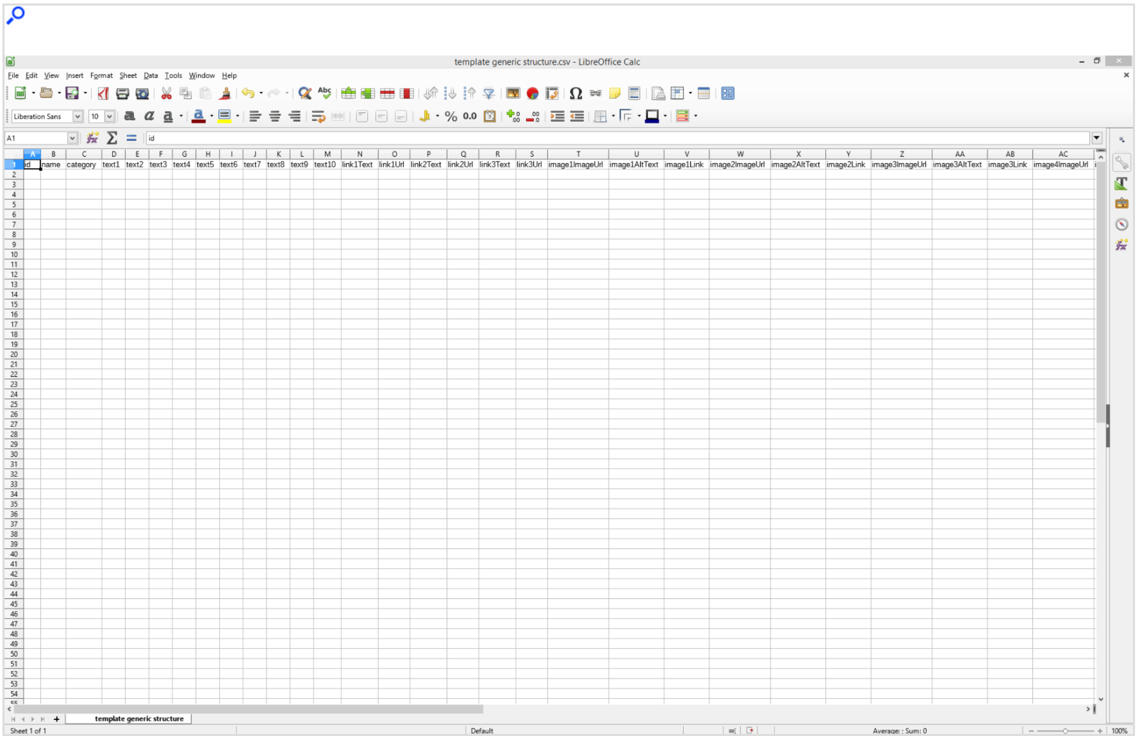
> **Tip:** Configuring an export feature generally requires programming.

> **Warning:** When configuring the export feature, observe the following:
>
> - The CSV file must be RFC-compliant. Technical notes are contained in RFC 4180.
> - Set character encoding for the CSV file to UTF-8 without BOM.
> - Use the semicolon (;) as a separator.
> - If some product data includes quotation marks (inverted commas), mask them with escape characters. Use the quotation mark **"** as the escape character. If you do not mask quotation marks, they are misinterpreted as code, and the product data import fails.
>
>   Example: You surround a word or a word group with quotation marks, such as "Savoir Vivre." In your CSV file, wrap the quoted text with double quotation marks: ""Savoir Vivre"". The outer quotation marks are recognized as escape characters so are not displayed in the message text.

Creating a CSV file manually

If your system/your data source does not have a feature for exporting product datasets to a CSV file, and you want to manually create a CSV file with product data, perform the following steps:

1. Download the template for the generic CSV structure here: template generic structure.csv
2. Open the template using a spreadsheet program, such as Microsoft Excel or LibreOffice Calc.



Note: When opening the template, if you need to enter a separator, select **semicolon**. If you need to specify character encoding, use **UTF 8 without BOM**. Some programs, such as Microsoft Excel, do not provide **UTF-8 without BOM**. In that case, select **UTF-8**.

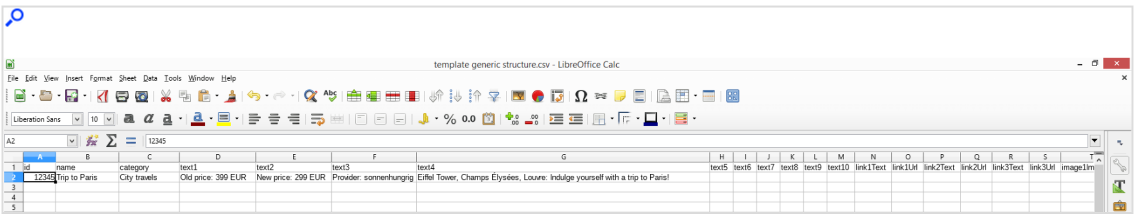
Warning: When filling out the template in the generic CSV structure, you must observe the following:

If some product data includes quotation marks (inverted commas), mask them with escape characters. Use the quotation mark **"** as the escape character. If you do not mask quotation marks, they are misinterpreted as code, and the product data import fails. Example: You surround a word or a word group with quotation marks, such as "Savoir Vivre." In your CSV file, wrap the quoted text with double quotation marks: ""Savoir Vivre"". The

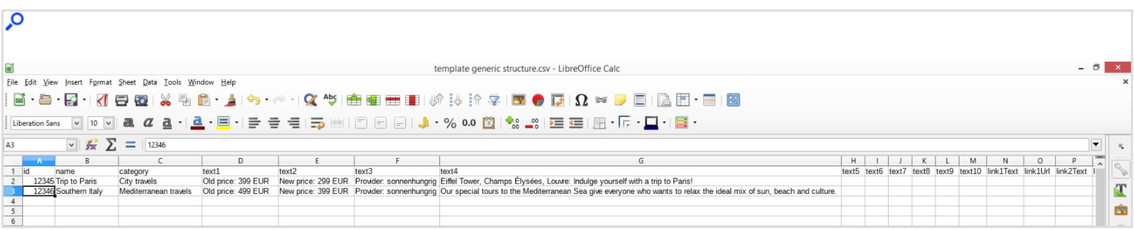
> outer quotation marks are recognized as escape characters so are not displayed in the message text.

3. Begin entering product data in row 2. Enter the data for each product side by side (see image).

> **Warning:** Do not change the column headings or their order in row 1. If you do, your product data cannot be loaded into the Template Kit.



To add another product offer, insert the data again side-by-side in the next row (see image).



Template column heading	Product data to enter
id	Enter the unique product ID. It is not shown in your messages. You may only enter a product ID in the document once.
name	Enter a name for your product offer. Later, in the Template Kit, you can select the product offer by its name to include it in your messages (static CSV article only). It is not shown in your messages.

<table>
<tr><th>Template column heading</th><th>Product data to enter</th></tr>
<tr><td>category</td><td>Enter the product category. It is not shown in your messages. With the product category, you can create overview category trees in the Template Kit and compile related products together to find specific products (static CSV article only). Enter the subcategories in this field, separated by hash symbols. Example: <code>Mediterraneantravel#Italy#Sicily</code>

Note: A category may have up to 10 sub-categories.</td></tr>
<tr><td>text1 – text10</td><td>Up to 10 text fields are available. Enter one piece of information in each field. For example:
the heading for your product offer, such as text1 in the text field
the name of the product to be shown in your message, such as text2 in the text field
the description of your product, such as text3 in the text field
the old price of your product, such as text4 in the text field
the current price of your product, such as text5 in the text field
the supplier/manufacturer of your product, such as text6 in the text field
You can choose what you want to enter in the text fields. Adapt the content according to your wants and the requirements of your product/your service.

It may be best to organize product offer components sequentially from text1 through text10, which is how they are shown from top to bottom in the finished product offer. If you are not sure of the best order, contact customer support.

The formatting (text size and text color) of the text field content is set later using an HTML layout.</td></tr>
</table>

Template column heading	Product data to enter
link1Text – link3Text	Enter the heading for the link or links to your product offer. For example: *Offer*, *More Information* or *Buy Now*.
link1Url – link3Url	Enter links to pages to which recipients are directed if they click a link (such as the corresponding product page in your web shop).
image1ImageUrl – image6ImageUrl	Enter the URLs for the corresponding product images. The images are loaded by Optimizely Campaign and displayed in your messages.
image1AltText – image6AltText	Enter alternative text for images. This text appears if an image cannot be loaded.
image1Link – image6Link	Enter a link to the product image. If the image is clicked, the recipient is forwarded to the link target. This can be your web shop or another address that you want to connect to the image. Avoid mixing up **ImageLink** with **ImageURL**, which indicates the saved location of the image.
additionalData1 – additionalData20	Enter additional data records that you can use, such as metadata for the program logic of the HTML layouts.

4. Save and rename the file.

> **Warning:** Give the file the name you entered for your CSV file when setting up content interface paragraphs. If you use a different name, the product data import will fail. If you forgot the name, contact customer support.

> **Note:** When saving the file, make sure the spreadsheet program does not assign a new file type. The file must have the file type CSV or file extension .csv.

Transferring the CSV file to the Optimizely server

After you save the completed and renamed CSV template, transfer it to your personal directory on the Optimizely server.

> **Tip:** If you use an Optimizely integration for Magento, or OXID, the transfer is automatic. If you do not use an Optimizely integration, but want to automate the transfer, use a script. Consult your system administrator or software service provider for a programming solution.

To transfer the completed and renamed Optimizely template in your directory to the Optimizely server, perform the following steps:

1. Log in to the Optimizely server with your user data.

   > **Tip:** If you do not have a user account for the Optimizely server, contact customer support. See FTP API (Windows) for information about logging in to the Optimizely server; see FTP API (macOS/OS X) for macOS.

2. Upload the Optimizely template to your personal directory on the Optimizely server.

   > **Warning:** If you have multiple directories on the Optimizely server, save the template in the directory set up for your CSV files during the configuration of the content interface. If you save the template to another directory, your product data import fails.

   After you load the completed and renamed template into the correct directory, your current product offers are available in the Template Kit for integration into your messages.

   > **Note:** It can take some time for your product offers, transferred as a CSV file, to be available in the Template Kit. You should

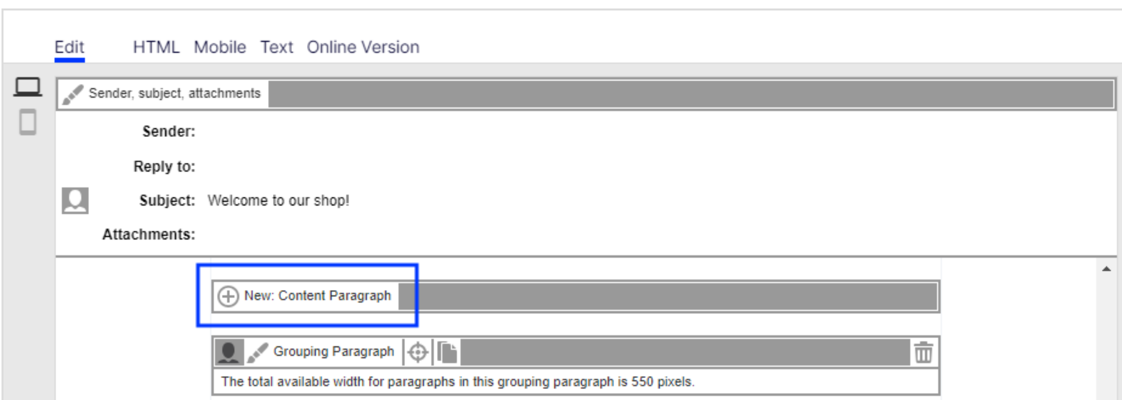
automatically perform the data transfer at night.

Loading and editing static CSV product data

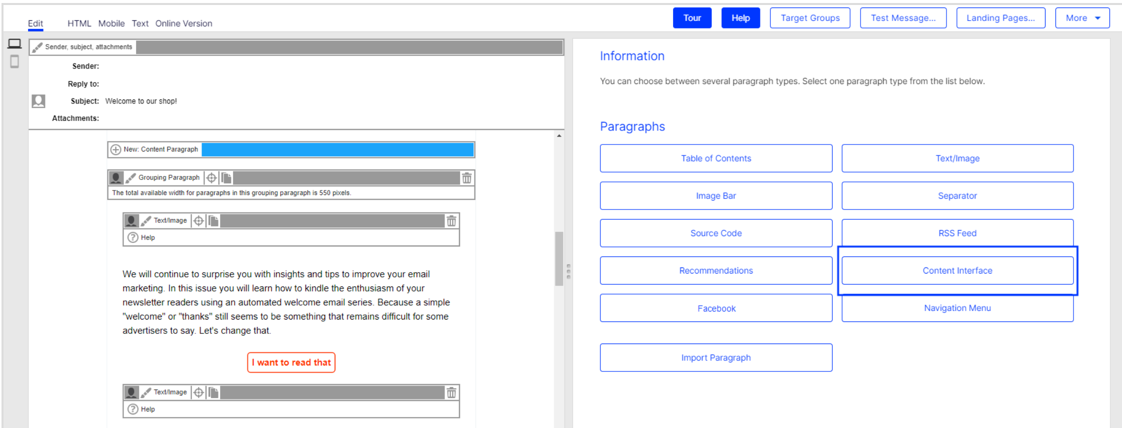
If you saved product data as a CSV file in your personal directory on the Optimizely server, you can load product offers into your messages and edit them as necessary in the Template Kit within a static CSV article. See general settings to change content interface paragraph settings. To integrate dynamic product data into the Template Kit, see Dynamic CSV and XML articles.

Loading product data

1. While editing a message in the Template Kit, click **New: Content Paragraph**.



2. Click **Content Interface**.



3. Change no settings in the configuration window. Click **Apply**. The new paragraph appears on the left in the preview window, and the **Content Interface Article** button appears below the new paragraph.

> **Tip:** Your product offers are created as content interface articles, which are subparagraphs of the content interface paragraphs.

4. Create a new content interface article by clicking **Content Interface Article** on the left. The configuration window for that article opens.
5. Change no settings in the configuration window. Click **Apply**. To the left of the preview window, the menu for the content interface article expands to include the button **Content Interface** .
6. Click **Content Interface** . The **Load Content** window opens on the right.
7. In the list, select the product offer to load into your message and click **Apply**. When the loading is complete, the product offer appears on the left of the preview window.

> **Tip:** To load additional product offers, create a new content interface article for each additional offer.

Editing product data in content interface article

Once your product offer is loaded into your message, you can edit the offer in the Template Kit. To do this, perform the following steps:

1. On the left of the preview window, in the menu for the corresponding content interface article, click **Static CSV Article**. The configuration window for that article opens.
2. Make your changes and click **Apply**.

> **Warning:** Do not change the layout template if you lack advanced HTML and CSS skills. Doing so can lead to errors, which means that your product offers will not display properly. If you want to modify the layout template but lack HTML and CSS skills, contact customer support.

Edit the content of your product offers in the CSV file. Then, re-upload the modified CSV file to the server. This ensures that your product offers are up-to-date and that no old, subsequently modified content in the CSV file is loaded into the Template Kit.

To update an existing content interface article, go to the article's menu bar, click **Content Interface**, select the appropriate product offer again, and click **Apply**.

> **Warning:** Customer support can configure the content interface paragraph so that product offers are updated at dispatch by comparing it with your CSV file. If this option is configured, changes to product offers must be made in the CSV file. If you only make changes in the Template Kit, they are overwritten at dispatch with old content from the CSV file.

Using XML

You can use the XML format for the content interface paragraphs. If you choose XML (Extensible Markup Language), do not save your product data with the CSV solution on the Optimizely server. Instead, Optimizely Campaign retrieve product data from your web space or server using a HTTP request.

When the request is made, your product data must:

- exist on your web space or server as an XML file (static product data)

  or

- be generated dynamically in an XML format (dynamic product data)

> **Tip:** Your company's environment determines whether you import static or dynamic product data. Contact your system administrator to learn which implementation is in use.

Saving static product data on the server

To save product data statically as XML files on your webspace or server, each product must be saved in an XML file. You cannot group multiple products into a single XML file. To save a product as an XML file, perform the following steps.

1. Open a text editor, such as Notepad (Windows) or Textedit (macOS/OS X).
2. Create a new document.

   > **Warning:** Set your text document to use UTF-8 character encoding. If you use another encoding, the text may not be represented properly.

3. Copy the following code into your document.
   Code to copy

```
<?xml version="1.0" encoding="UTF-8"?>
<element>
<property name="id">123456</property>
<property name="text1"><![CDATA[<b>Text field 1</b>]]></property>
<property name="text2"><![CDATA[Text field 2]]></property>
<property name="text3"><![CDATA[Text field 3]]></property>
<property name="text4"><![CDATA[Text field 4]]></property>
<property name="text5"><![CDATA[Text field 5]]></property>
<property name="text6"><![CDATA[Text field 6]]></property>
<property name="text7"><![CDATA[Text field 7]]></property>
<property name="text8"><![CDATA[Text field 8]]></property>
```

```
<property name="text9"><![CDATA[Text field 9]]></property>
<property name="text10"><![CDATA[Text field 10]]></property>
<property name="link1Text"><![CDATA[Text for link 1]]></property>
<property name="link1Url"><![CDATA[URL for link 1]]></property>
<property name="link2Text"><![CDATA[Text for link 2]]></property>
<property name="link2Url"><![CDATA[URL for link 2]]></property>
<property name="link3Text"><![CDATA[Text for link 3]]></property>
<property name="link3Url"><![CDATA[URL for link 3]]></property>
<property name="image1ImageUrl"><![CDATA[Image URL for image 1]]></-
property>
<property name="image1AltText"><![CDATA[Alternative text for image
1]]></property>
<property name="image1Link"><![CDATA[Link for image 1]]></property>
<property name="image2ImageUrl"><![CDATA[Image URL for image 2]]></-
property>
<property name="image2AltText"><![CDATA[Alternative text for image
2]]></property>
<property name="image2Link"><![CDATA[Link for image 2]]></property>
<property name="image3ImageUrl"><![CDATA[Image URL for image 3]]></-
property>
<property name="image3AltText"><![CDATA[Alternative text for Image
3]]></property>
<property name="image3Link"><![CDATA[Link for image 3]]></property>
<property name="image4ImageUrl"><![CDATA[Image URL for image 4]]></-
property>
<property name="image4AltText"><![CDATA[Alternative text for image
4]]></property>
<property name="image4Link"><![CDATA[Link for image 4]]></property>
<property name="image5ImageUrl"><![CDATA[Image URL for image 5]]></-
property>
<property name="image5AltText"><![CDATA[Alternative text for image
5]]></property>
<property name="image5Link"><![CDATA[Link for image 5]]></property>
<property name="image6ImageUrl"><![CDATA[Image URL for image 6]]></-
property>
<property name="image6AltText"><![CDATA[Alternative text for image
6]]></property>
<property name="image6Link"><![CDATA[Link for image 6]]></property>
<property name="additionalData1"><![CDATA[Additional information 1]]></-
property>
<property name="additionalData2"><![CDATA[Additional information 2]]></-
property>
<property name="additionalData3"><![CDATA[Additional information 3]]></-
property>
<property name="additionalData4"><![CDATA[Additional information 4]]></-
property>
<property name="additionalData5"><![CDATA[Additional information 5]]></-
property>
<property name="additionalData6"><![CDATA[Additional information 6]]></-
property>
<property name="additionalData7"><![CDATA[Additional information 7]]></-
property>
```

```
<property name="additionalData8"><![CDATA[Additional information 8]]></-
property>
<property name="additionalData9"><![CDATA[Additional information 9]]></-
property>
<property name="additionalData10"><![CDATA[Additional information 10]]></-
property>
<property name="additionalData11"><![CDATA[Additional information 11]]></-
property>
<property name="additionalData12"><![CDATA[Additional information 12]]></-
property>
<property name="additionalData13"><![CDATA[Additional information 13]]></-
property>
<property name="additionalData14"><![CDATA[Additional information 14]]></-
property>
<property name="additionalData15"><![CDATA[Additional information 15]]></-
property>
<property name="additionalData16"><![CDATA[Additional information 16]]></-
property>
<property name="additionalData17"><![CDATA[Additional information 17]]></-
property>
<property name="additionalData18"><![CDATA[Additional information 18]]></-
property>
<property name="additionalData19"><![CDATA[Additional information 19]]></-
property>
<property name="additionalData20"><![CDATA[Additional information 20]]></-
property>
</element>
```

> **Note:** The following steps guide you through customizing this code for your setup. Only product ID (in code, the property **id**) is mandatory. Other values are optional. Delete any unused values.

4. In the first property row, enter the product ID . Insert your product ID between the brackets.

   Example: Your product has the product ID "FR123". `<property name-e="id">FR123</property>`

   > **Note:** Use only alphanumeric characters (letters and numbers) in the product ID. If you use special characters, you may encounter problems importing product data.

> **Tip:** In all steps below, you insert the value between brackets, after **CDATA**.

5. In the 2nd through 11th property rows (**text1** through **text10**), enter up to ten text elements for your product offer. "Text field 1", "Text field 2", "Text field 3" and so on are entered as placeholders for your text elements.

   The text elements can include things such as the heading for the product offer, the product name, the product category, the product description, the old price, the current price, the manufacturer/supplier, and so on. Adapt the content to your needs and your product or service's requirements.

   Example: The header of the product offer is: *Relax in Paris*. `<property name="text1"><![CDATA[Relax in Paris]]></property>`

   > **Tip:** It is best to organize product offer components sequentially, from **text1** through **text10**, which is how they are shown in the finished product offer. If you are not sure what order is best for you, contact customer support. The formatting (text size and text color) of the text field content is set separately using an HTML layout.

6. In the 12th property row, enter the heading for the link to your product offer. For example: *Offer*, *More Information* or *Buy Now*.

   Example: The link text is: *Book now*. `<property name="link1Text"><![CDATA[Book now]]></property>`

7. In the 13th property row, enter the URL that leads to the product page in your web shop.

   Example: The URL of the product page is http://www.sonnenhungrig.com/paris: `<property name="link1Url"><![CDATA[http://www.sonnenhungrig.com/paris]]></property>`

8. In the property rows 14 through 17, if your product offer needs more than one link, enter two additional links and link texts. Enter the information as specified in steps 6 and 7.

> **Tip:** Example: Next to the link to the booking page for the Paris trip, another link leads to the current weather in Paris.

9. In the 18th property row enter the URL to the product image. Optimizely Campaign loads the product image using that URL and shows it in your message.

   Example: The URL of the product image is "http://www.sonnenhungrig.com/eiffeltower.jpg". `<property name="image1ImageUrl"><![CDATA[http://www.sonnenhungrig.com/eiffeltower.jpg]]></property>`

10. In the 19th property row, enter the alternative text for your product image. An alternative text is the text that is shown when an image cannot be loaded. Enter alternative texts, because visually impaired people can read these using special programs, promoting an accessible Internet.

    Example: The alternative text for your product is "The Eiffel Tower in Paris in springtime". `<property name="image1AltText"><![CDATA[The Eiffel Tower in Paris in springtime]]></property>`

11. In the 20th property row, enter a URL for the product image. If a recipient clicks on the image, he or she is led to the associated URL. This can be your web shop or also any other address that you want to connect to the image.

    > **Warning:** To display the image in messages, be certain that you are using the **ImageURL**, which indicates the image's saved location. The **ImageLink**, on the other hand, directs the recipient to the link target, which has additional information.

    Example: The URL associated with your product image is: "http://www.sonnenhungrig.com/sightsinfrance". `<property name="image1ImageUrl"><![CDATA[http://www.sonnenhungrig.com/sightsinfrance]]></property>`

12. In the property lines 21 through 35, up to five additional URLs for the locations where the product images are stored can be entered, and five additional alternative texts and five additional links that direct the recipient to the link target when clicked. This means: Up to six product images, each with an alternative text and a link can be associated with each product offer. Enter the information as specified in steps 9 and 11 of this manual.

13. In the property lines 36 to 55, enter additional data records that you can use, such as metadata for the program logic of the HTML layouts.
14. Save the text document. For the file name, use the product ID (the value you inserted for the **id** property). For file type, use .xml.
15. Delete the document's file extension. For example, if the document is named *ParisTrip01.xml*, rename the file as *ParisTrip01*.

    > **Warning:** If you do not remove the file extension, your product data cannot be loaded.

16. Save the document in your webspace or on your server in the directory that you communicated for the setup of the product paragraph with content interface.

    > **Warning:** Do not change the location of the product description documents without consulting customer support. If you change directories without consulting customer support, you cannot load product data using the content interface.

    When you have saved your text document in your web space or on your server, you can access your product offer in the Template Kit. Follow the individual steps in the Static XML article section to upload your product offer into the Template Kit using the content interface.

Generating dynamic product data on the server

The preparation of dynamic product data generally follows the same scheme as static product data, but the XML files are not prepared manually. Instead, they are loaded from a database when called (by HTTP request) via the content interface and automatically generated as XML. Your company needs to program this process. To generate dynamic product data, consult your system administrator.

> **Note:** When performing the configuration:

1. The XML feed must be UTF-8 encoded.
2. The product ID must be positioned at the end of the URL.

   Correct: `http://request.example.com/product?id=123456789`

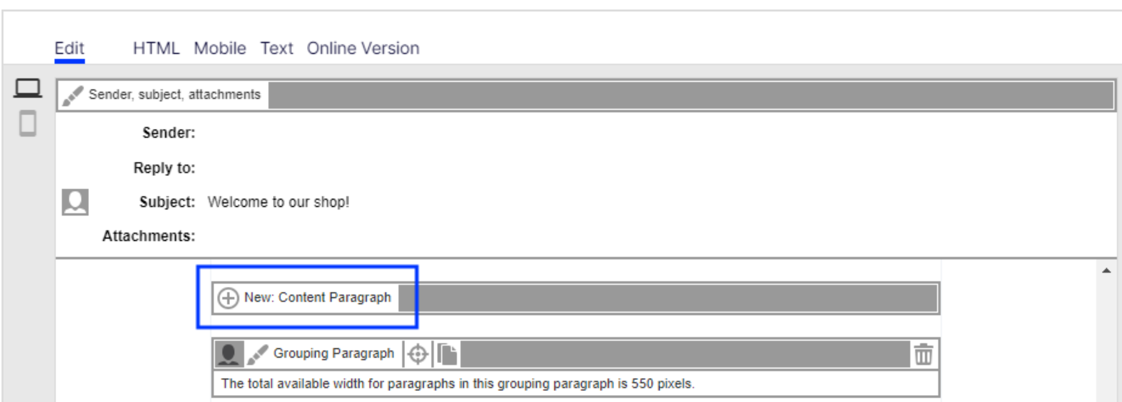
   Incorrect: `http://request.example.com/product/123456789/data`

Loading and editing static XML product data

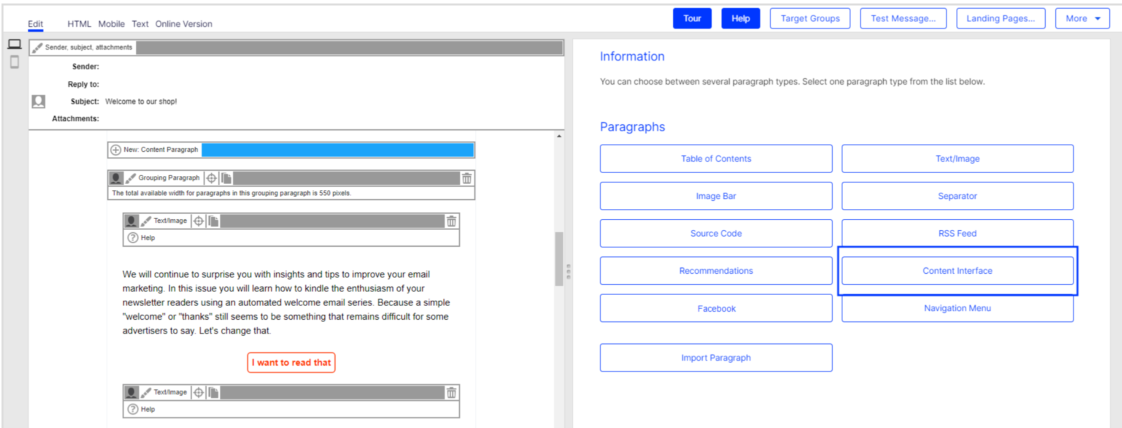
When your product data is available as XML files in your web space or on your server, you can load the data into the Template Kit, then edit it. See general settings to change content interface paragraph settings. If you want to integrate dynamic product data into the Template Kit, see Dynamic CSV and XML articles.

Loading product data

1. In the Template Kit, click **New: Content Paragraph**.



2. Click **Content Interface**.



3. Do not change settings in the configuration window. Click **Apply**. The new paragraph appears on the left, in the preview window.

> **Tip:** Product offers are created as content interface articles, which are subparagraphs of content interface paragraphs.

4. Create a new content interface article by clicking **Content Interface Article** on the left of the preview window. The configuration window opens.
5. Change no settings in the configuration window. Click **Apply**. On the left side of the preview window, the menu bar for the content interface article expands to include the button **Content Interface** .
6. Click **Content Interface** . The **Load Content** window opens on the right.
7. In the **Content Element** box, enter the ID of the product offer that you want to load into the Template Kit.
8. On the bottom right of the window, click **Apply**. Your product data is loaded via the content interface from your webspace or your server into the Template Kit. When the import is complete, the product offer appears on the left of the preview window.

Editing XML product data in content interface article

If your product offer is loaded into your message, you can later edit it directly in the Template Kit. To do this, perform the following steps:

1. On the left side of the preview window, in the menu bar for the corresponding content interface article, click **Static XML Article**. On the right, a window for selecting the paragraph type opens.
2. Make changes and confirm them by clicking **Apply**.

> **Warning:** Do not change the layout template if you lack advanced HTML and CSS skills. Doing so can lead to errors, which means that your product offers will not display properly. If you want to modify the layout template but lack HTML and CSS skills, contact customer support.

If you update the content of product offers in the XML file, you can re-upload the modified file to the server. This ensures that your product offers are up-to-date and that no old, subsequently-modified content in the XML file is loaded into the Template Kit.

To update an content interface article, open the article's menu bar, click **Content Interface**, enter the corresponding product ID, and click **Apply**.

> **Warning:** Customer support can configure the content interface paragraph so that product offers are updated at dispatch by comparing it with your CSV file. If this option is configured, changes to product offers must be made in the CSV file. If you only make changes in the Template Kit, they are overwritten at dispatch with old content from the CSV file.

Dynamic CSV and XML articles

You can send personalized product recommendations with dynamic CSV and XML articles. Product data is loaded from the CSV or XML source for each individual recipient while sending.

> **Note:** URLs that reference image files are dynamically inserted into the mailing during dispatch. Ensure that your server can handle a large number of requests when the mailing is sent.

Prerequisites

- Dynamic CSV articles and/or XML items are enabled in your client.
- For CSV product data source, see Exporting product data with a CSV file. For XML source, see Using XML.

Creating a mapping reference

When sending the message, Optimizely Campaign uses the product ID from the mapping reference to load product data from the data source. This loads different products into the message for each recipient.

To send a different product to each recipient, create a *mapping reference* that lists product recommendations for each recipient using the product ID. There are two ways to create a mapping reference:

- **Recipient list**. Import the product IDs to be mapped into a recipient list field in your recipient list.
- **Mapping file**. Create a CSV file that contains the recipient ID of each mailing recipient on a separate line. Add to each recipient ID an additional column that specifies the product ID to be mapped.

  Structure of the mapping file

A	B
recipient1@example.com	ProductID001
recipient2@example.com	ProductID002
recipient3@example.com	ProductID003
and so on	and so on

> **Warning:** If you enter several product IDs, leave no space after the separator.

> Wrong: `001, 002, 003`
>
> Correct: `001,002,003`

Using a recipient list as a mapping reference

1. To set up the recipient list field for mapping product IDs, contact customer support. Up to 256 characters may be transferred to the recipient list field. If you want more, tell customer support.

   Several methods (including CSV file import and SOAP API) are available for importing recipient-specific product IDs to recipient lists.

2. Transfer product IDs to the recipient list.

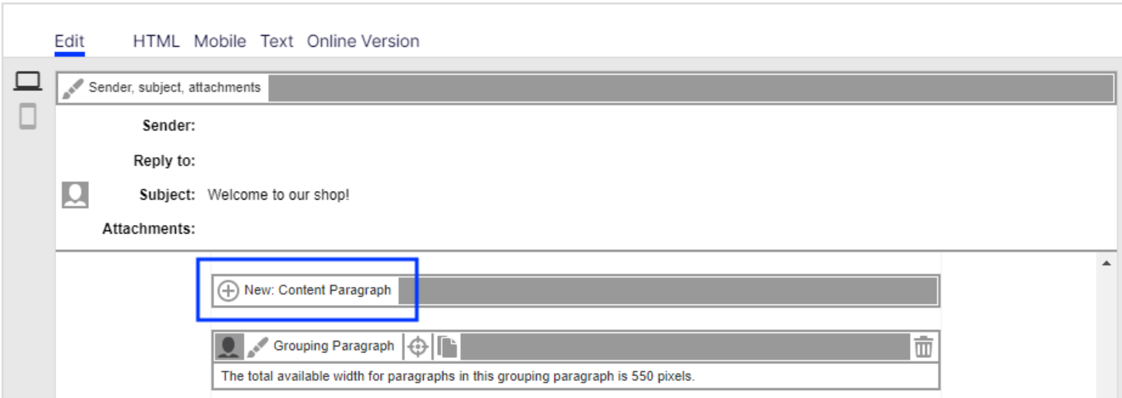
Using a mapping file as a mapping reference

1. Create a CSV file whose first column contains recipient IDs. Each ID must be on a new line.
2. In the second column, enter the product IDs for each recipient.
3. Transfer the mapping file to the server, in the mapping file location specified when you set up dynamic articles.

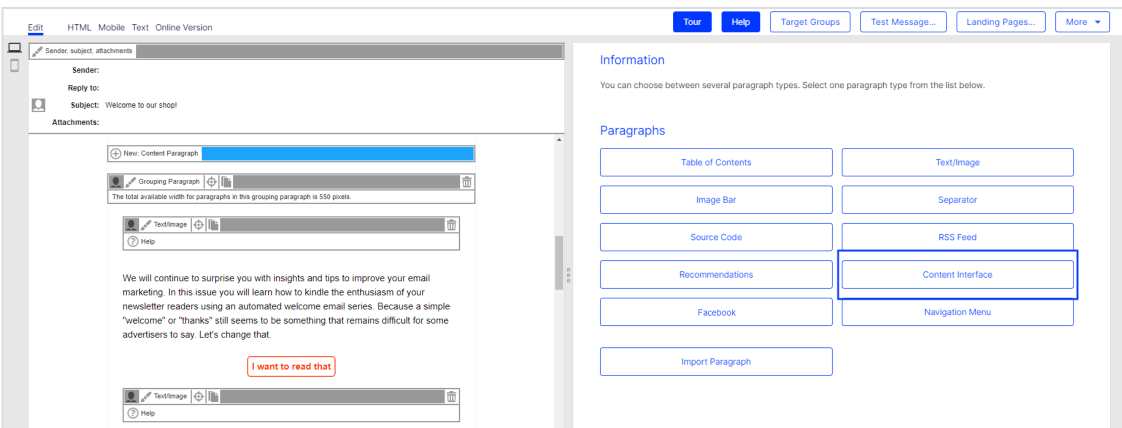
   > **Tip:** Alternatively, use the **Upload file** feature, located in the Optimizely Campaign menu under **More**. (To enable this feature, contact customer support.)

Creating dynamic CSV and XML articles

1. To create a dynamic CSV or XML article, in the Template Kit, create a new content paragraph by clicking **New: Content Paragraph**.



2. Select the content interface paragraph type by clicking **Content Interface**.



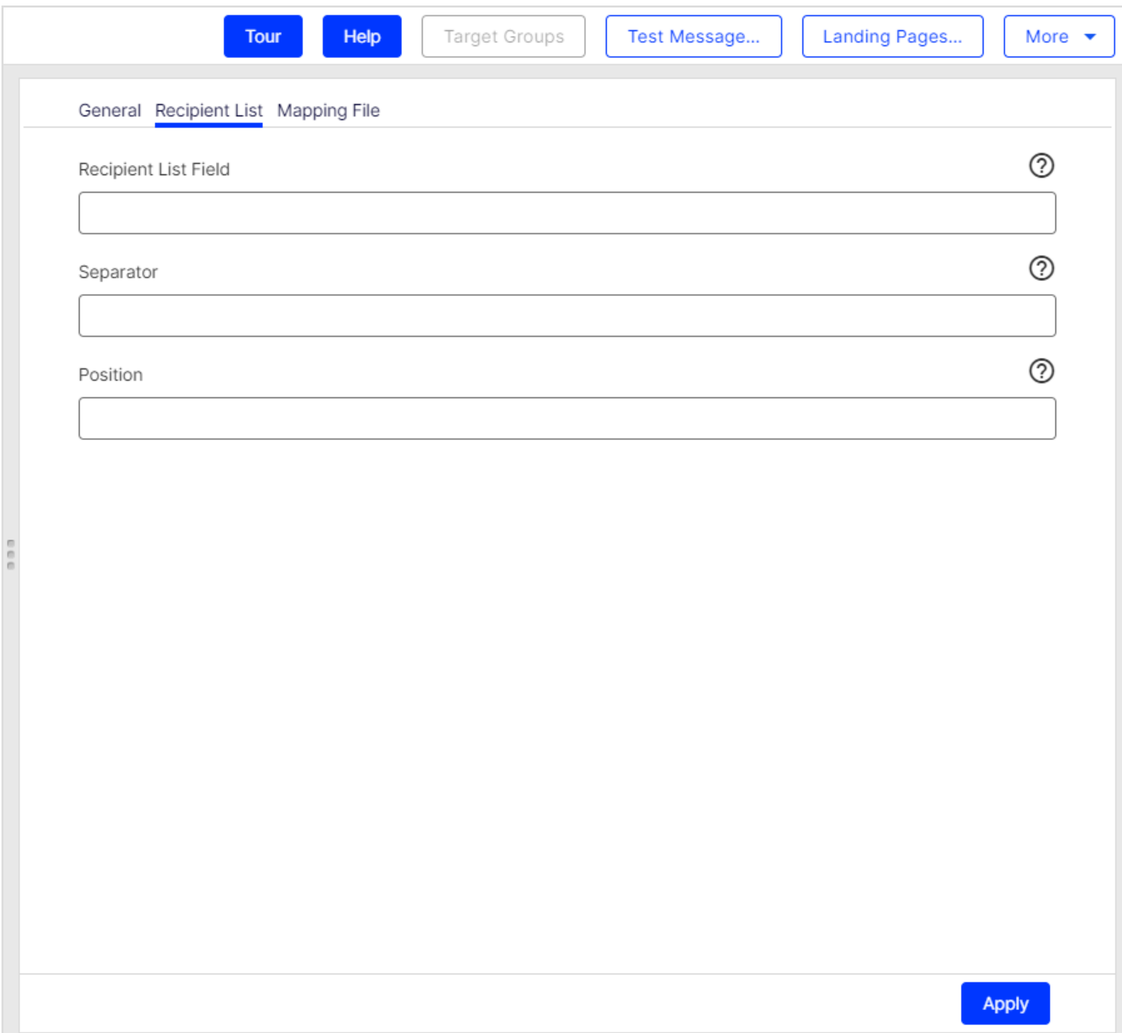
3. Click **Apply**. A new content paragraph of type content interface is created. On the left of the preview is the **Content Interface Article** button.
4. Click **Content interface article**. A new content interface article is created. The configuration window for the article opens.

Configuring dynamic CSV and XML articles

After you create a dynamic CSV or XML article, configure it by following these steps:

Recipient list as the mapping reference

1. On the right of the content interface article configuration window, open the **Recipient List** tab.



2. In the **Recipient List Field** box, enter the name of the recipient list field that contains the product ID. Enclose the name with curly brackets: {Name}.
3. If multiple product IDs are contained in the recipient list field, enter the separator used between product IDs.

> **Note:** If you enter nothing, a comma is assumed.

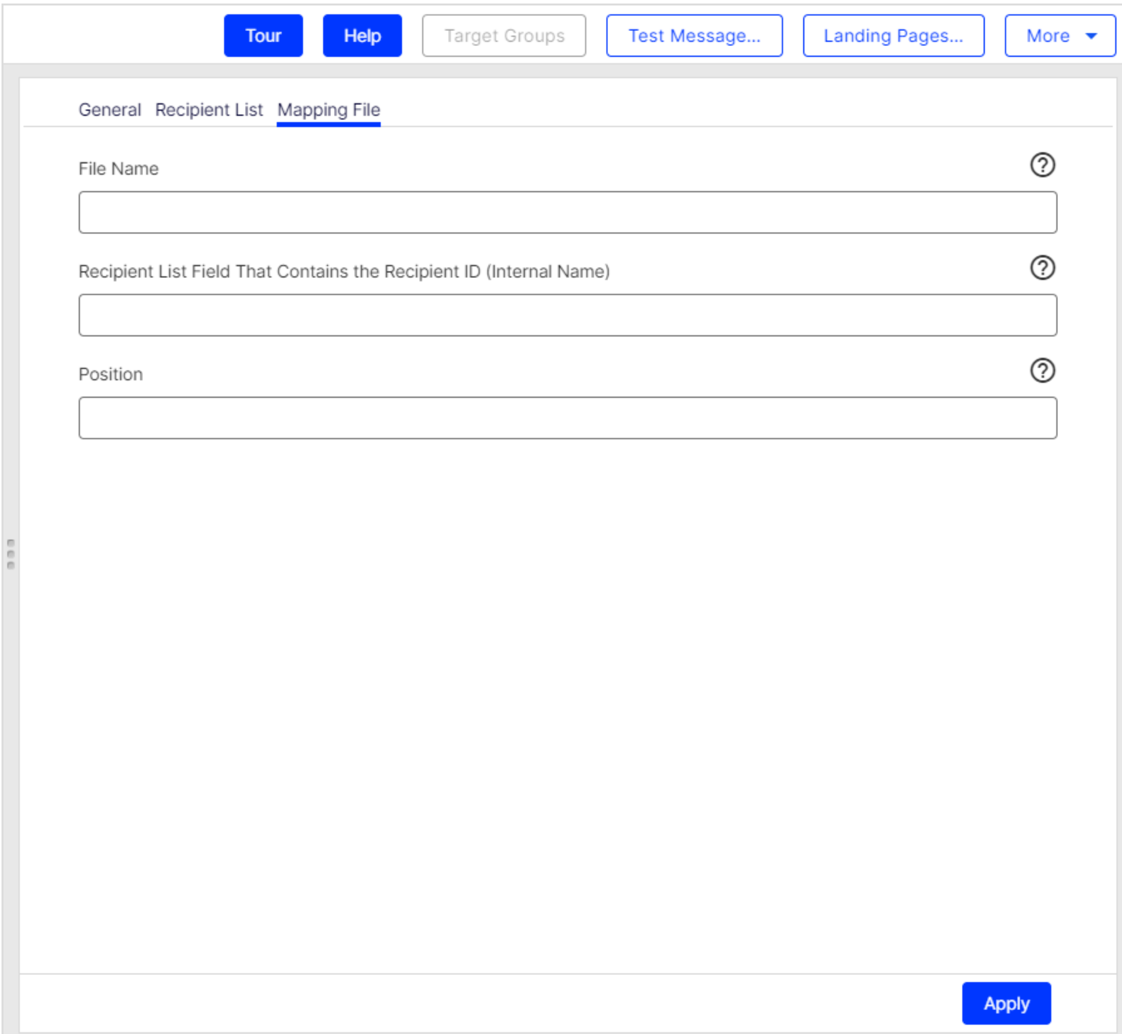
4. If the recipient list field contains multiple product IDs, enter the position number of the product to be loaded.

   For example, your recipient list field contains three comma-separated product IDs: "001,002,003." To select the product with the ID "003", enter position number "3," because the product ID "003" is in the third position. If you do not enter a position number, the product in the first position is selected automatically.

5. Click **Apply**. To the left of the preview, you see configuration data on the content interface article. When the message is sent, product data is loaded from the data source using this configuration.

Mapping file as a mapping reference

1. On the right of the content interface article configuration window, open the **Mapping File** tab.



2. In the **File name** box, enter the name of the mapping file.
3. In the **Recipient list field that contains the recipient ID (internal name)** box, enter the internal name of the recipient list field. If you do not know the internal name, contact customer support.
4. If the mapping file in the product ID column contains multiple product IDs, enter the position number of the product to be loaded.

   For example, Your recipient list field contains three comma-separated product IDs: "001,002,003." To select the product with the ID "003", enter position number "3," because the product ID "003" is in the third position. If you do not enter a position number, the product in the first position is selected automatically.

5. Click **Apply**. To the left of the preview is the configuration data on the content interface article. When the message is sent, product data is loaded from the product data source using this configuration.

General settings

You create individual product offers as content interface articles, which are subparagraphs of the content interface paragraphs. Within a single message, you can create multiple content interface paragraphs, using multiple lower-level content interface articles. To apply changes to a higher-level content interface paragraph, perform the following steps:

In the left side of the preview, click **Content Interface** in the menu bar of the content interface paragraph. On the right side, the configuration window for general settings for the content interface paragraphs open.

See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.

General

Parameter	Description
Content	
Heading	Enter a heading for the paragraph.
Show in desktop version	Select to include this paragraph in the desktop mailing.
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in text	Select to show the paragraph in the text version of the mailing.

Parameter	Description
version	
Link	
Text	Enter text to describe the link.
URL	Enter a link (such as a landing page for the product group).
Alignment	You can position the link on the right, the left or center.

Button

See Click2Go.

SWYN

You can activate sharing via social networks (SWYN) for each content paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph

Parameter	Description
	over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
WhatsApp	
Parameters for WhatsApp are identical to Twitter's.	

Parameter	Description
Email	
Show	Lets recipients share the paragraph via email.
Title	Displays up to 50 characters as email subject if the recipient shares the paragraph via email. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph via email. If you enter nothing here, the standard text is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Xing	
Parameters for Xing are identical to Twitter's.	

Options

You can give each content paragraph a different appearance from the general layout. To do so, use the layout configuration in this tab.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	The paragraph is displayed over the entire height as standard, taking into account the content. Alternatively, you can specify a fixed height value here. If the content exceeds this height, the value is ignored and the content displayed at the corresponding height.

Parameter	Description
Background color	The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Spacing between the articles	A space with this height is placed between articles. By default, the first number in the Padding option is used. This option is enabled only when using the default layout.
Image quality	Select **Same as image quality in template settings** to use the image quality specified under **Settings** > **General**. The **Normal** and **High-resolution** options allow you to set the image quality independently of the template settings. If **High-resolution** is selected, the uploaded image must be at least double the width of the image in the mailing. Example: For a 640 pixel wide image in the mailing you need an image with a width of 1280 pixels. This ensures that images do not lose sharpness during rendering of the mailing.
Layout	Set the general settings for the article layouts in the general settings. If there is no content available for the selected layout, the default layout is used.
Border	
Show	Select if you want to apply a border around the paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually.

Parameter	Description
	Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the width (in percent; 100% default) of the paragraph in the mobile view. If you want two paragraphs to be displayed next to one another in the mobile view, set their widths so they combine to 100%. Otherwise, the two paragraphs are displayed on top of one another with the allocated widths.
Table of contents	
Show in table of contents	Select to display the paragraph in the table of contents for the section.
Alternative table of contents entry	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic) .See Target groups.

HTML layouts

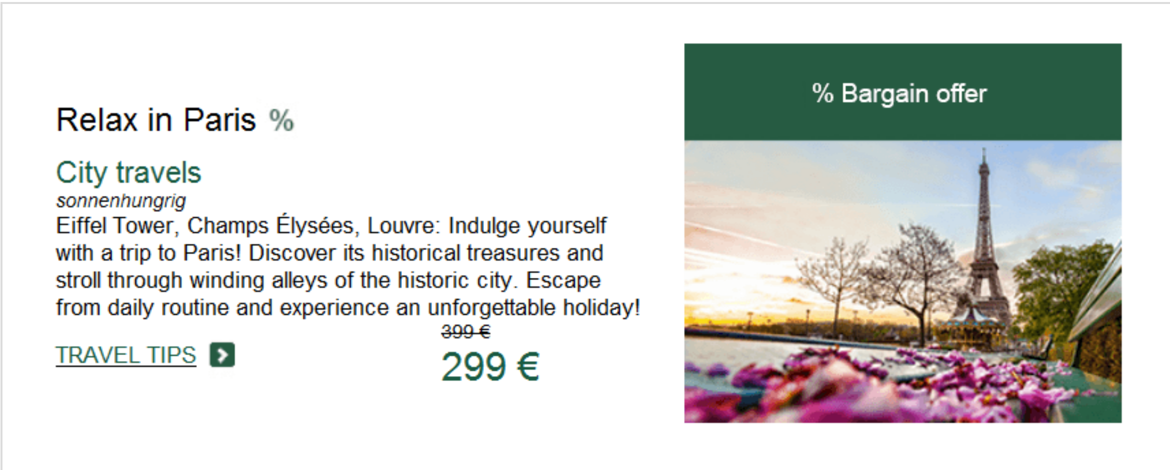
The content interface paragraph has a default layout for formatting offer texts and images. You can additionally set up up to 5 alternate layouts. For alternate layouts, contact customer support.

If you have advanced HTML and CSS skills, you can set up alternate HTML layouts yourself. If no alternate layouts are saved for the mobile and text versions, the default layout is used.

> **Note:** In some cases, some text elements will not be in the desired order.

Sample default layout

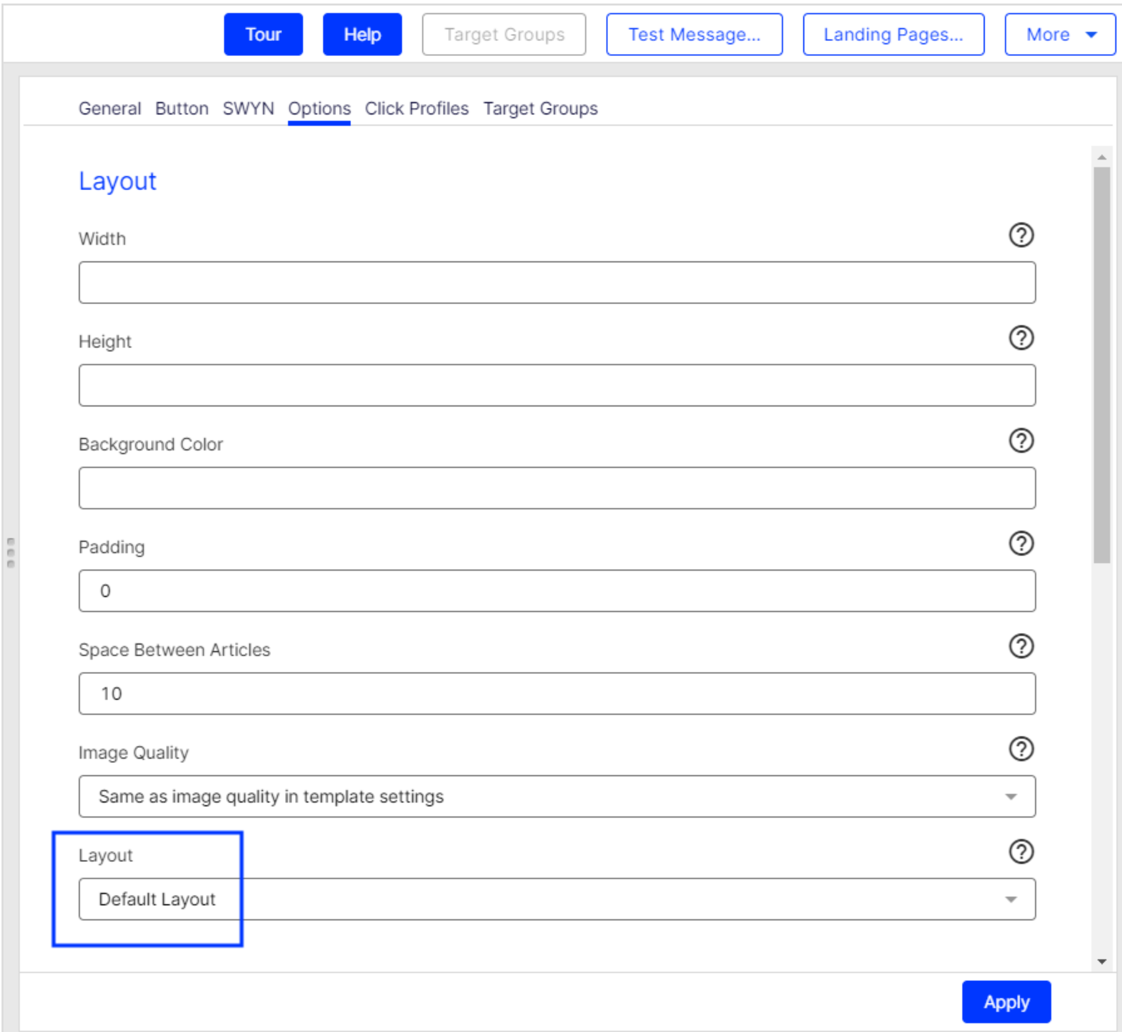
Sample alternate layout



Selecting a layout

1. To select a standard or alternate layout, while editing a message in the Template Kit, look at the left side of the preview. On the content interface paragraph to which your product offer belongs, click **Content interface**. The configuration window opens on the right.
2. Open the **Options** tab.

3. In the **Layout** area, in the **Layout** drop-down list, select the layout you want to use.



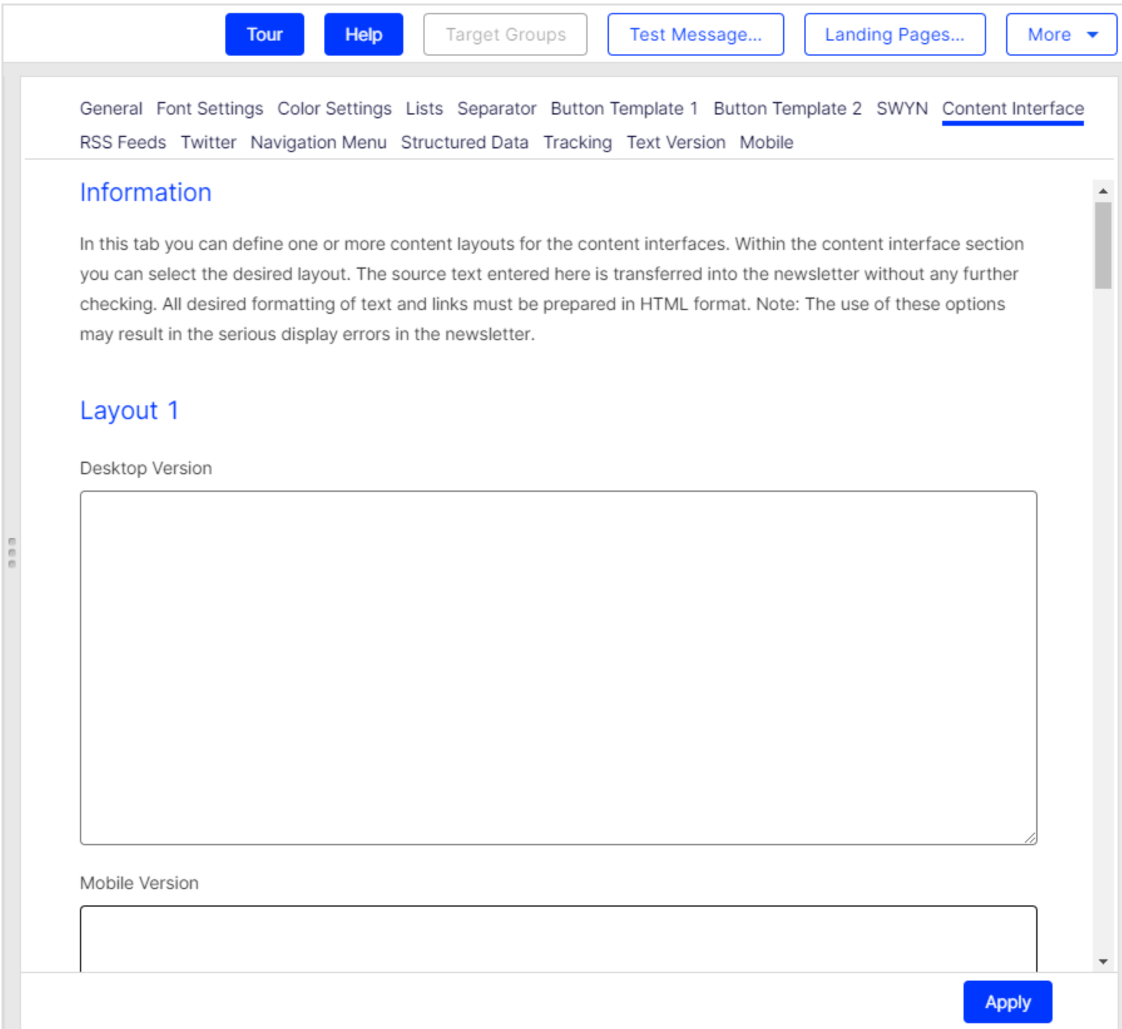
4. Click **Apply**. On the left side of the preview, the formatting of your product offer changes accordingly.

Editing a layout

You can edit alternate layouts at any time. You cannot change the default layout.

> **Warning:** Editing alternate layouts without advanced HTML and CSS skills can lead to severe errors in your messages.

1. On the left side of the preview, click **Settings**.
2. Open the **Content Interface** tab. Each layout has source text fields for the desktop, mobile, and text version.



3. Edit the layout source code as desired.
4. Click **Apply**.

Troubleshooting CSV and XML

This topic describes how to troubleshoot common errors that can arise while working with the content interface paragraph.

CSV troubleshooting

Issue	Possible cause	Solution
Product data does not load or loads incorrectly	Semicolons were not used as separators.	Change the separating characters in your CSV file to semicolons.
Product data does not load or loads incorrectly	Quotation marks in texts were not masked with an escape character and were erroneously interpreted as code.	Mask quotation marks in texts with the escape character **"** (with an additional quotation mark for each quotation mark).
Product data was loaded incorrectly	The CSV file is not encoded as UTF-8 without BOM.	Encode the CSV file as UTF-8 without BOM or UTF-8.
Product data was loaded incorrectly	One or more HTML layouts contain incorrect source text.	Correct the source text. If you do not have advanced HTML and CSS skills, contact customer support.
Product data is not loading	The CSV import is not (yet) performed.	Contact customer support so that they can review the CSV import.
Product data is not loading	The CSV file is saved in the wrong directory on the server.	Transfer the CSV file to the directory you indicated when setting up the content interface.
Product data is not loading and a server error message appears.	The CSV file path is incorrect.	Contact customer support.
The content interface paragraph type is not available.	The feature was not activated.	Contact customer support.
Components of a product offer are not being shown. For example, a product image is not displayed.	The source text of the HTML layout contains invalid code. For example, a tag is not closed.	Contact customer support. If you have advanced HTML and CSS skills, correct the source text.

Issue	Possible cause	Solution
Links are not being tracked	You entered the link into a standard text field.	Enter the link in a link field. Links placed into a standard text field cannot be tracked.

XML troubleshooting

Issue	Possible cause	Solution
Product data is not loading	The product ID is entered incorrectly.	Enter the correct product ID.
Product data is not loading	The saved XML file has a file extension.	Remove the file extension.
Product data is not loading	The corresponding product offer no longer exists on your webspace or server.	Save the product offer again on your webspace or server.
Product data is not loading	The product data is saved in the wrong directory on the server or webspace.	Transfer the product data you are trying to load into the directory that you indicated when setting up the content interface.
Product data is not loading	The product ID is not positioned at the end of the URL.	Change your system configuration so that the product ID is positioned at the end of the URL. **Correct**: https://www.example.com/products/?id=123456789

Issue	Possible cause	Solution
		Incorrect: https://www.example.com/products/?id=123456789?param1=XY?param2=abc
Some content is not loading. For example, the product image is missing.	Error in the XML code you generated.	Correct the XML code.
The content interface paragraph type is not available.	The feature has not been activated for you.	Contact customer support.
Components of a product offer are not being shown. For example, a product image is not displayed.	The source text of the HTML layout contains invalid code. For example, a tag is not closed.	Correct the source text. If you do not have advanced HTML and CSS skills, contact customer support.
Links are not being tracked	You entered the link into a standard text field.	Enter the link in a link field. Links placed into a standard text field cannot be tracked.

Source code paragraph

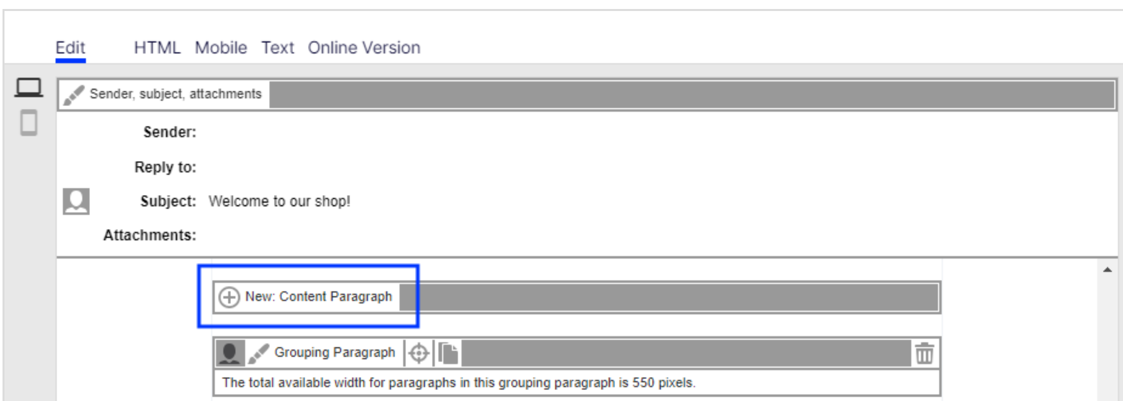
You can enter HTML code in the source code paragraph. Email programs do not show HTML to the full extent, so code entered here may lead to a faulty layout in your mailing.

The source code paragraph can be used by the Content interface paragraph, which you can use to automatically fill in the content fields.

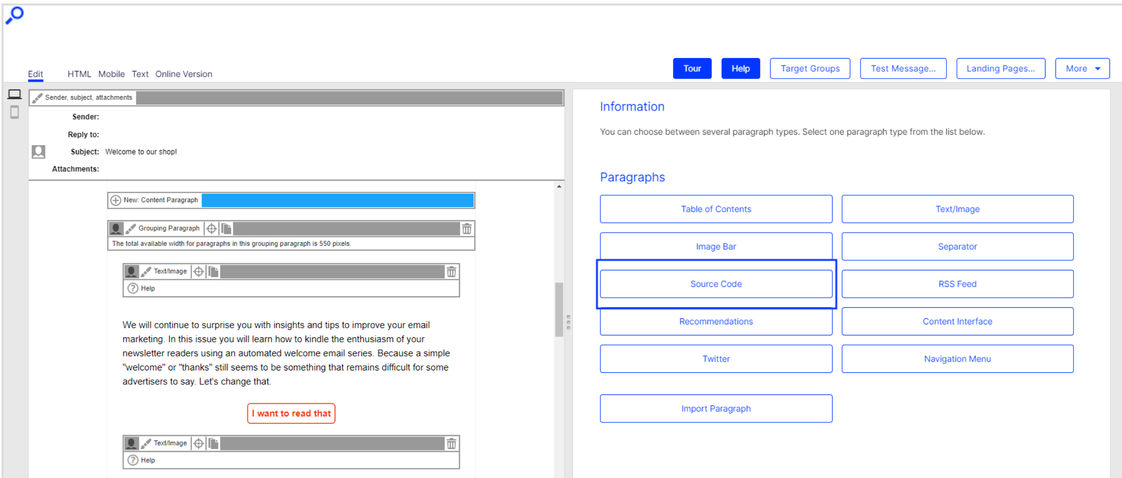
Creating a source code paragraph

1. While editing the mailing content in the Template Kit, click **New: Content Paragraph**.

> **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.



2. Click **Source Code**.



3. In the configuration window, click **Apply**. The newly created source code paragraph will appear on the left side in the preview window.

Configuring a source code paragraph

1. On the left side of the preview, in the menu bar of the source code paragraph, click **Source Code**.The configuration window opens on the right-hand side.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.
   - HTML
   - Mobile
   - Text
   - Options
   - Click profiles
   - Target groups

HTML

Parameter	Description
Source Code	Enter HTML source code. Do not enter the HTML declaration, meta, or body tags.

Mobile

Parameter	Description
Source Code	Enter an alternative source code for the mobile version of the mailing. For this option to take effect, you must activate the setting **Activate Mobile Version** in the general settings.If the mobile version is activated and you enter nothing here, the **HTML** tab's source code is used for the mobile version.

Text

Parameter	Description
Text	Enter the text for the text version of this paragraph. Do not use HTML or other formatting. However, you can insert line breaks and special characters for separator elements (for example ***** or ++++++).

Options

You can define an individual layout, different from the general newsletter layout, for each content paragraph.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Background	To define the color, enter a hexadecimal value preceded by **#** (such as

Parameter	Description
Color	#000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Border	
Show	Check to apply a border around the paragraph.
Border Width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	

© Optimizely 2022

Parameter	Description
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Table of Contents	
Show in Table of Contents	Select to display the paragraph in the table of contents for the section.
Heading	Enter a heading to be displayed in the table of contents. If you leave the field blank, the heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click Profile	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target Group	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic)see Target groups.

Loading content via the content interface

If the content interface is activated for the source code paragraph in your client, you can provide the content of the HTML, mobile, and text version in a CSV file and import them into the source code paragraph. The CSV format cannot be changed.

Format the CSV file as follows:

```
 id;name;html;mobile;text 1;Source code 1;
   <div class="html-version" style="background-color: #ff0000;">HTML ver-
sion</div>;
"    <div class="mobile-version" style="background-color: #ff0000;">Mobile
version</div>";
   Text version
```

To integrate the content in the source code paragraph, click the menu bar of the paragraph **Open** and select the desired content in the right column.

Hints

- The **id** and **name** columns are only used internally. Enter a name to help you identify the paragraph in the editor.
- The **html**, **mobile** and **text** columns can contain HTML source code that is added unchanged to the source code paragraph.
- Values must be CSV-compliant.
- To format the content, you must have strong HTML knowledge, particularly of email. The use of invalid or non-supported HTML code may lead to major display errors in the mailing.

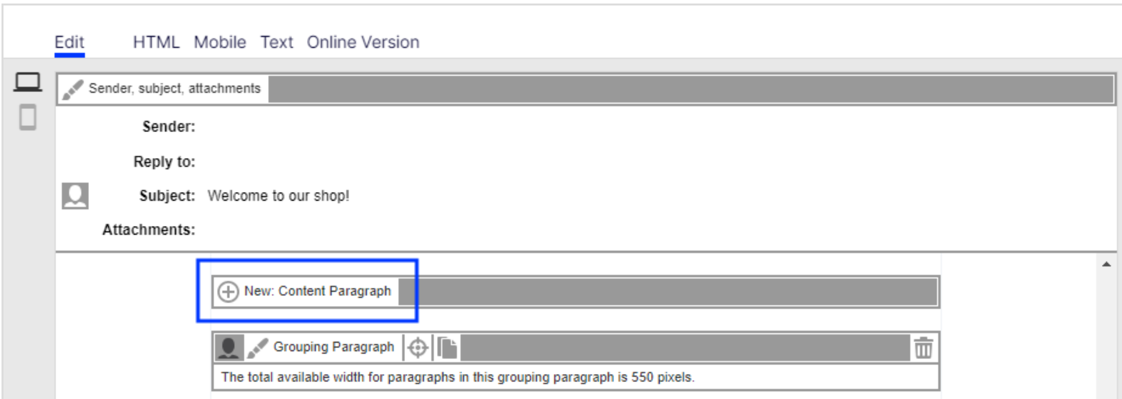
Text/image paragraph

Use the text/image paragraph to add a text block or image to your mailing. You can also position the elements relative to one another.

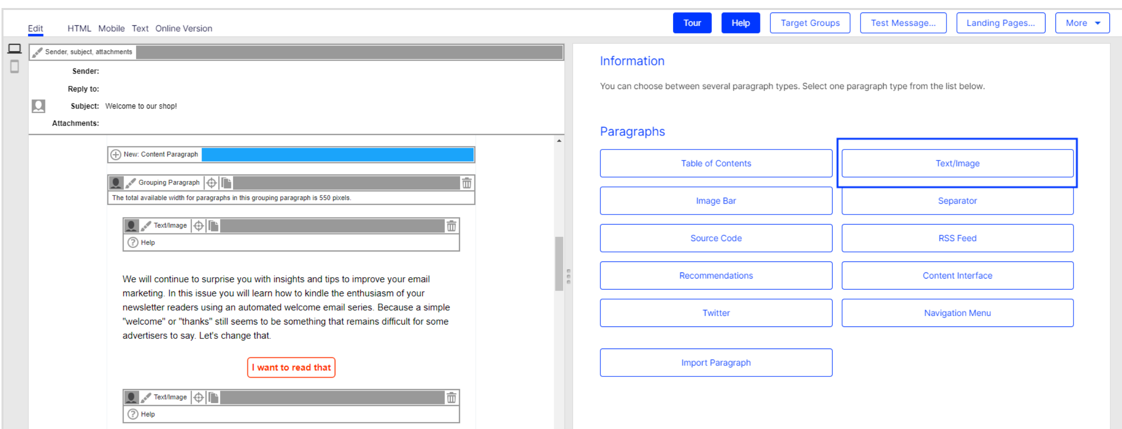
Creating a text/image paragraph

1. While editing the mailing content in the Template Kit, click **New: Content Paragraph**.

> **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.



2. Click **Text/Image**.



3. In the configuration window, click **Apply**. The newly created text/image paragraph appears on the left of the preview window.

Configuring a text/image paragraph

1. On the left side of the preview, in the menu bar of the text/image paragraph, click **Text/Image**. The configuration window opens on the right side.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.
   - General
   - Image
   - Button

- SWYN
- Options
- Click profiles
- Target groups

General

Parameter	Description
Content	
Heading	Enter a heading for the paragraph.
Text	Enter text using the Rich Text Editor. You can use additional formatting, for example insert breaks, create lists and tables and use other text decorations and colors. For formatting purposes, use the Rich Text Editor toolbar.
Show in Desktop Version	Select to include this paragraph in the desktop mailing.
Show in Mobile Version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in Text Version	Select to show the paragraph in the text version of the mailing. You might do this, for example, with an image bar paragraph, because images are not displayed in the text version. Alternative text is displayed there instead.
Link	
Text	This text is linked to the URL entered below.
URL	Enter a target URL here, for example a landing page.
Alignment	Alignment can be right, left or centered.

Image

Parameter	Description
Image	Upload an image from your computer or enter an image URL in the **Alternative external URL** field that points to the image file.
Image Quality	Select **Same as image quality in template settings** to use the image quality specified under **Settings** > **General**. The **Normal** and **High-resolution** options allow you to set the image quality independently of the template settings. If **High-resolution** is selected, the uploaded image must be at least double the width of the image in the mailing. Example: For a 640 pixel wide image in the mailing you need an image with a width of 1280 pixels. This ensures that images do not lose sharpness during rendering of the mailing.
Alternative Text	This text is displayed if a recipient blocks or disables the display of images in his/her email client, or if the image cannot be displayed for another reason. Enter a short image description or title.
Link	You can link the image to a landing page or a page from your website. If you entered a text link in this paragraph, you should use the same link for the image.
Subtitle	Enter an optional image subtitle here.
Position	You can place the image in a separate column next to heading and text block, or in a separate column next to the text block and below the heading. These positions are recommended in most cases. If you use large images that cover the entire width of a paragraph or area, place them centered below the heading, text, or the link. If you select the **Below the heading right aligned** or **Below the heading left aligned** options, the text floats around the image.

Button

See Click2Go.

SWYN

You can enable the SWYN function for social networks individually for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her

Parameter	Description
	Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
WhatsApp	
Parameters for WhatsApp are identical to Twitter's.	
Email	
Show	Lets recipients share the paragraph via email.
Title	Displays up to 50 characters as email subject if the recipient shares the paragraph via email. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph via email. If you enter nothing here, the standard text is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Xing	
Parameters for Xing are identical to Twitter's.	

Options

You can define an individual layout, different from the general newsletter layout, for each content paragraph.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Background Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Border	
Show	Select if you want to apply a border around the entire paragraph.

© Optimizely 2022

Parameter	Description
Border Width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Table of Contents	
Show in Table of Contents	Select to display the paragraph in the table of contents for the section.
Alternative Table of Contents Entry	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click Profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target Groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups.

Table of contents paragraph

Use the table of contents paragraph to create a table of contents for your mailing. You can control the display of items in the table of contents by including only certain areas.

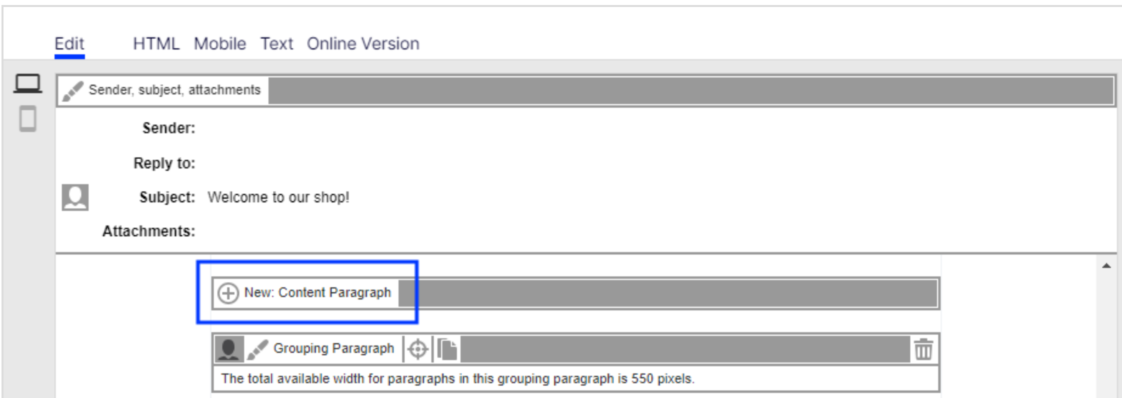
- List paragraphs instead of the header and footer
- List paragraphs including the header, except for the footer
- List paragraphs including the footer, except for the header
- List paragraphs including the header and footer
- Only list the paragraphs of a grouping paragraph

> **Tip:** To exclude content paragraphs from the table of contents, edit the corresponding content paragraph. In the content paragraph's configuration window, edit the **Options** tab > **Table of Contents** setting and enter the desired value.

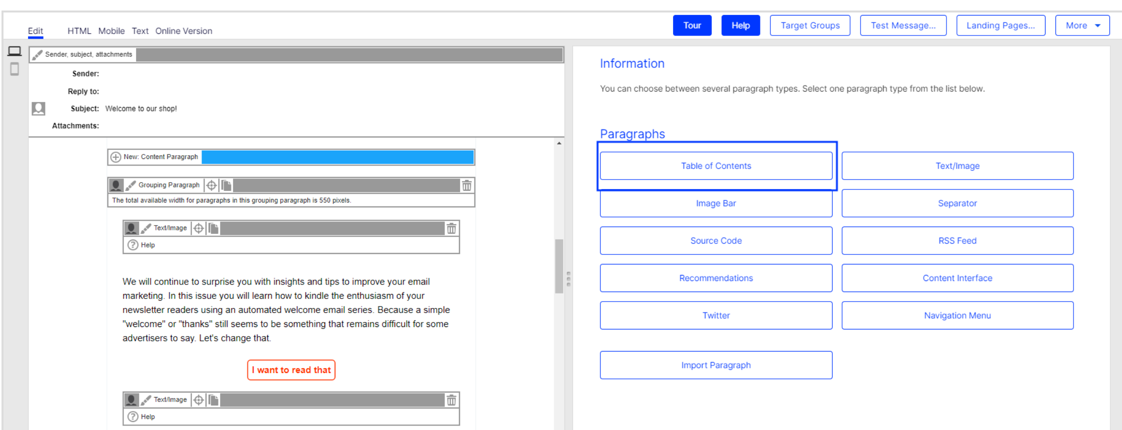
Creating a table of contents paragraph

1. While editing the mailing content in the Template Kit, click **New: Content Paragraph**.

> **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.



2. Click **Table of Contents**.



3. In the configuration window, click **Apply**. The new table of contents paragraph appears on the left.

Configuring a table of contents paragraph

1. On the left side of the preview, in the menu bar of the table of contents paragraph, click **Table of Contents**. The configuration window opens on the right.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.
   - General
   - Options
   - Target groups

General

Parameter	Description
Content	
Heading	Enter a title for the table of contents.
Show in Desktop Version	Select to include this paragraph in the desktop mailing.
Show in Mobile Version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in Text Version	Select to show the paragraph in the text version of the mailing.

Options

You can define an individual layout, different from the general newsletter layout, for each content paragraph.

© Optimizely 2022

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Area	Select the paragraph areas to be included in the table of contents.
Background Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Border	
Show	Select if you want to apply a border around the entire paragraph.
Border Width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries:

Parameter	Description
	• 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Lists	
List Type	You can layout the table of contents in a default CSS style. Use a custom label or no label.
Custom List Item Label	If you want to use a custom list item label, upload a graphic. The maximum width is 30 pixels.Larger images are scaled down to this size.

Target groups

Parameter	Description
Target Groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups.

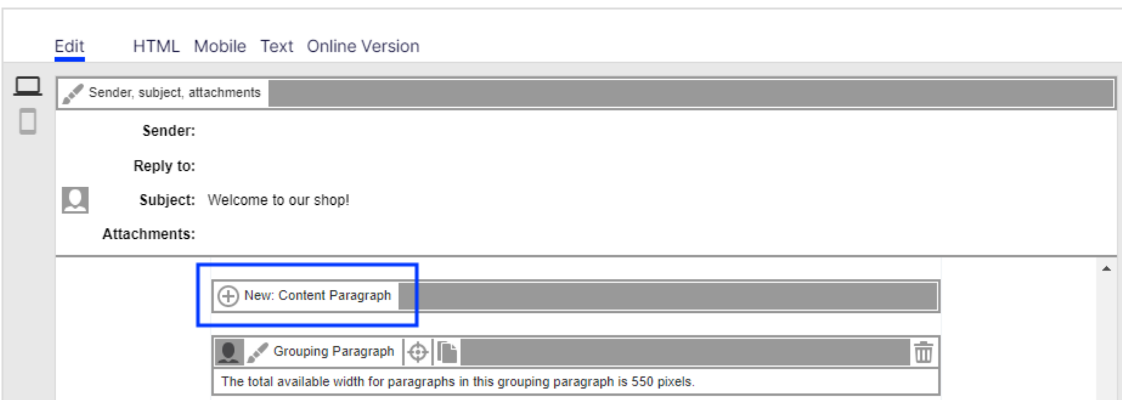
Image bar paragraph

Create a horizontal or vertical image bar that contains up to ten images. Uploaded images are automatically scaled and adapted to the available width.

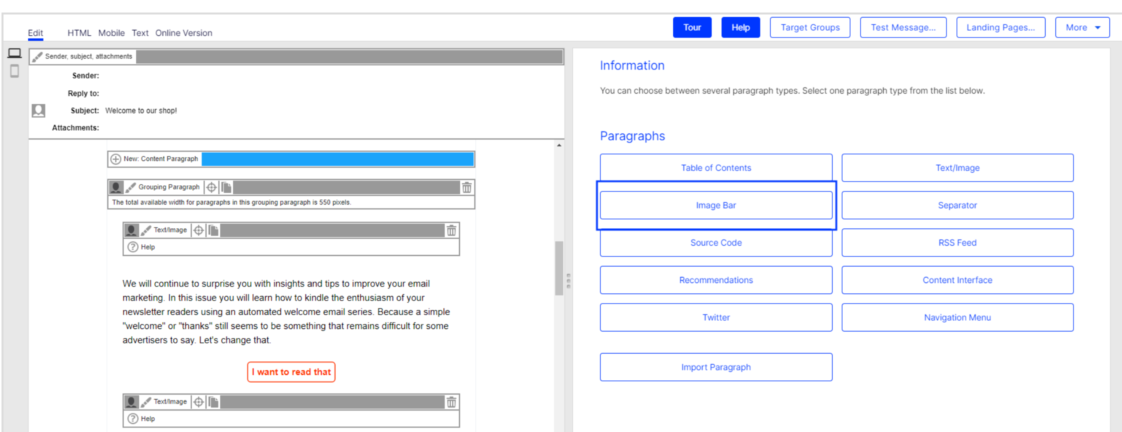
Creating an image bar paragraph

1. While editing the mailing content in the Template Kit, click **New: Content Paragraph**.

> **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.



2. Click **Image Bar**.



3. In the configuration window, click **Apply**. The new image bar paragraph appears on the left side in the preview window.

Configuring an image bar paragraph

1. On the left side of the preview, in the menu bar of the image bar paragraph, click **Image Bar**. The configuration window opens on the right-hand side.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.
   - General
   - Button
   - SWYN
   - Options
   - Click profiles
   - Target groups

General

Parameter	Description
Content	
Heading	Enter a heading for the paragraph.
Show in Desktop Version	Select to include this paragraph in the desktop mailing.
Show in Mobile Version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in Text Version	Select to show the paragraph in the text version of the mailing.
Image 1-10	

© Optimizely 2022

Parameter	Description
Image	Upload an image from your computer or enter an image URL in the field **Alternatively external URL** that points to the image file.
Alternative Text	This text is displayed, if a recipient has blocked or disabled the display of images in the email client, or if the image cannot be displayed for any other reason. Enter an alternative text that may contain a short image description or title.
Link	You can link the image to a landing page or a page from your website. If you have entered a text link in this paragraph, we recommend that you use the same link for the image.

Button

See Click2Go.

SWYN

You can enable the SWYN function for social networks for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default Values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph

© Optimizely 2022

Parameter	Description
	over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
WhatsApp	
Parameters for WhatsApp are identical to Twitter's.	
Email	
Show	Lets recipients share the paragraph via email.
Title	Displays up to 50 characters as email subject if the recipient shares the paragraph via email. If you enter nothing here, the standard title is displayed.

© Optimizely 2022

Parameter	Description
Text	Displays up to 250 characters if the recipient shares the paragraph via email. If you enter nothing here, the standard text is displayed.
Xing	
Parameters for Xing are identical to Twitter's.	

Options

On the **Options** tab, define an individual layout, different from the general newsletter layout, for each content paragraph.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Separation space	Enter an integer value (pixels) to create a space between the images.
Arrangement	By default, a horizontal image bar is created. Alternatively, you can laid out the image bar vertically.
Image quality	Select **Same as image quality in template settings** to use the image quality specified under **Settings** > **General**. The **Normal** and **High resolution** options allow you to set the image quality independently of the template settings.

Parameter	Description
	If **High resolution** is selected, the uploaded image must be at least double the width of the image in the mailing. Example: For a 640 pixel wide image in the mailing you need an image with a width of 1280 pixels. This ensures that images do not lose sharpness during rendering of the mailing.
Alignment	Select how the image bar is to be positioned. If you have a horizontal image bar that uses the entire available width, changing this value does not affect the display.
Background color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Border	
Show	Select if you want to apply a border around the entire paragraph.
Border Width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4

© Optimizely 2022

Parameter	Description
	pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Separation Space	Enter an integer value (pixels) to create a space between the images.
Table of Contents	
Show in Table of Contents	Select to display the paragraph for the section in the table of contents .
Alternative Table of Contents Entry	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click Profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target Groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups.

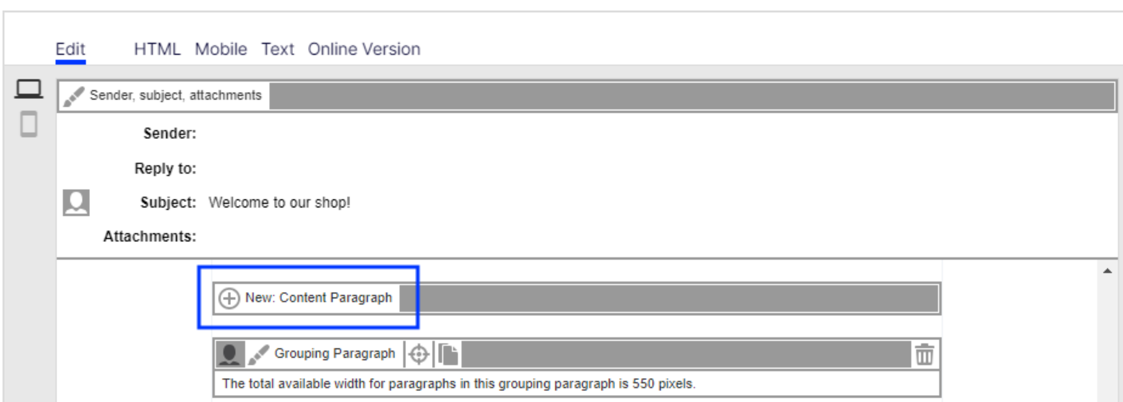
Separator paragraph

You can use the separator paragraph either at the main level for visually separating multiple grouping paragraphs or the second level for separating content paragraphs.

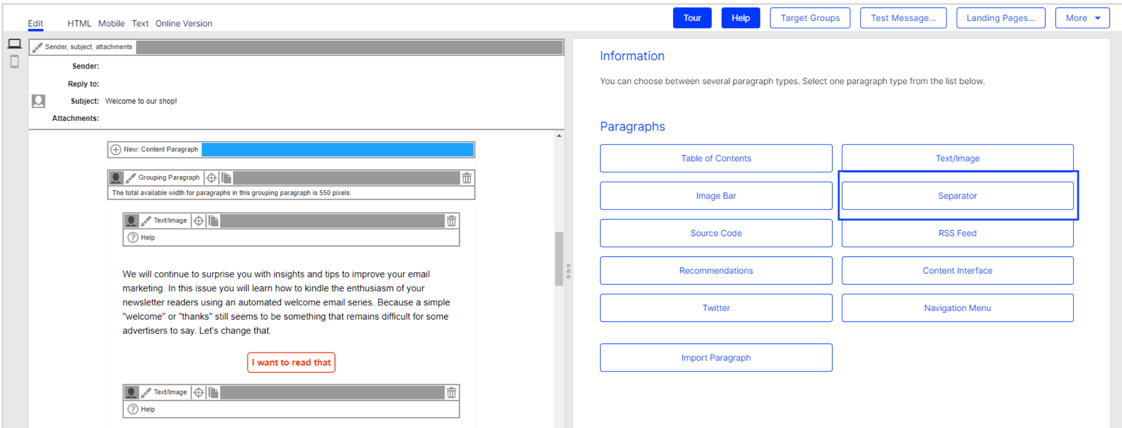
Creating a separator paragraph

1. While editing the mailing content in the Template Kit, click **New: Content Paragraph**.

> **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.



2. Click **Separator**.



3. In the configuration window, click **Apply**. The new separator paragraph appears on the left.

Configuring a separator paragraph

1. On the left side of the preview, in the menu bar of the separator paragraph, click **Separator**.The configuration window opens on the right.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.
   - General
   - Target groups

General

Parameter	Description
Layout	
Show Separator Line	Define the layout of the horizontal line in the general settings.
Show Top Link	Define the layout of the top link in the general settings.

Parameter	Description
Show Image	Upload a custom top link icon in the general settings.
Show Spacing	Define the spacing above and below the horizontal line, and above and below the top link in the general settings.
Content	
Show in Desktop Version	Select to include this paragraph in the desktop mailing.
Show in Mobile Version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.

Target groups

You can assign separator paragraphs to a target group.Test the newsletter layout for target groups using the action button **Target group** at the upper right of the window.

Parameter	Description
Target Groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups.

RSS feed paragraph

> **Note:** To enable this feature, contact customer support.

You can use an RSS feed to publish information in a standardized format, effectively providing a type of interface for third-party providers. The Template Kit can access this interface and incorporate its content into a newsletter. You can edit texts or reposition content after it is retrieved.

© Optimizely 2022

The Template Kit may contain several RSS feed paragraphs, each of which accesses a different feed.

You can insert RSS feed paragraphs into header and footer spaces and in structural paragraphs. Also, a supplementary tab is activated in the Template Kit's general settings, where you can set content order in default layout. You can define alternative layouts by entering HTML/text via the **Options** tab.

Formatting the RSS feed

For the RSS feed to be processed correctly, it must meet the RSS 2.0 specification. The required information for the channel node is not processed by the Template Kit, but it must still be available. Only the subnodes of the item node are used.

> **Note:** Optimizely Campaign only supports JPEG images in RSS feeds.

Sample RSS feed

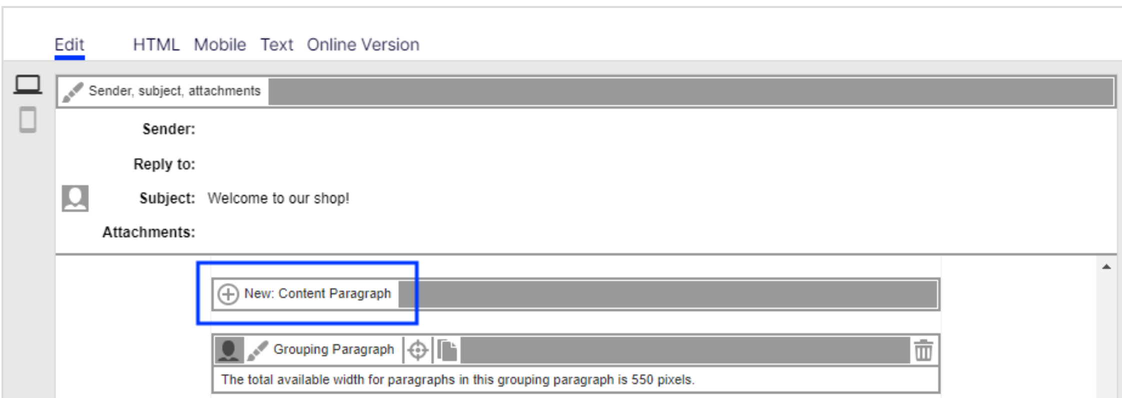
```
<?xml version="1.0"?>
<rss version="2.0">
  <channel>
    <title>RSS Feed</title>
    <link>http://www.example.com/</link>
    <description>Text</description>
      <item>
        <title>Title 1</title>
        <description>Text</description>
        <enclosure url="http://www.example.com/image1.jpeg" length="12345" type-
e="image/jpeg" />
        <link>http://www.example.com/title1</link>
        <comments>http://www.example.com/title1/comments</comments>
        <category>News</category>
        <author>author@example.com</author>
        <pubDate>Sun, 19 May 2002 15:21:36 GMT</pubDate>
      </item>
      <item>
        <title>Title 2</title>
        <description>Text</description>
        <enclosure url="http://www.example.com/image2.jpeg" length="23456" type-
e="image/jpeg" />
        <link>http://www.example.com/title2</link>
        <comments>http://www.example.com/title2/comments</comments>
        <category>News</category>
        <author>author@example.com</author>
        <pubDate>Sun, 19 May 2002 15:21:36 GMT</pubDate>
      </item>
```

```
    </channel>
</rss>
```

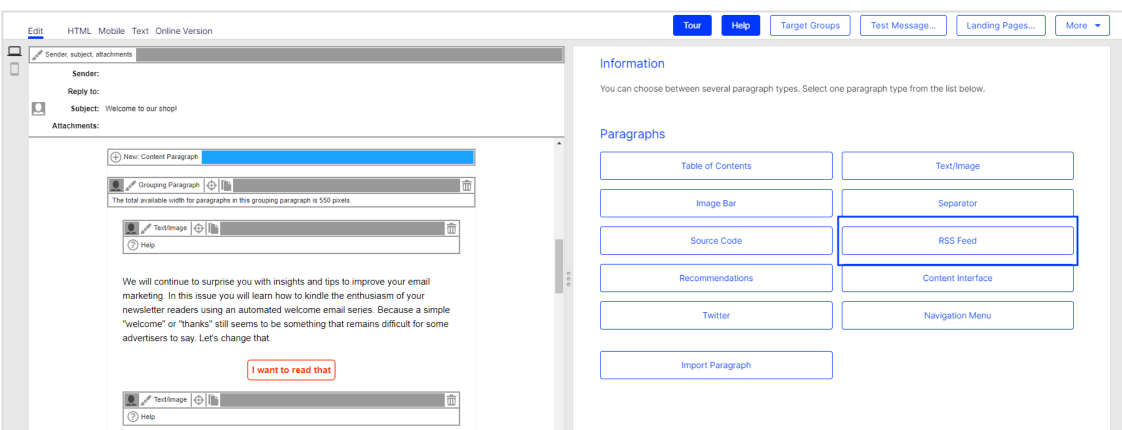
Creating an RSS feed paragraph

1. While editing the mailing content in the Template Kit, click **New: Content Paragraph**.

> **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.



2. Click **RSS Feed**.



3. In the configuration window, change no settings and click **Apply**. The new RSS feed paragraph appears on the left in the preview window.

Configuring an RSS feed paragraph

1. On the left side of the preview, in the menu bar of the RSS feed paragraph, click **RSS Feed**.
2. See the following tables to set options. Click **Apply** to confirm your settings.
   - General
   - RSS feed
   - Button
   - SWYN
   - Default values
   - Options
   - Click profile
   - Target groups

General

Parameter	Description
Content	
Heading	Enter a heading for the paragraph.
Show in Desktop Version	Select to include this paragraph in the desktop mailing.
Show in Mobile Version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in Text Version	Select to show the paragraph in the text version of the mailing.
Link	

Parameter	Description
Text	This text is subsequently linked in the mailing.
URL	Enter the RSS feed landing page (for example) or another URL.
Alignment	Position the link to the right, left, or center.

RSS feed

Parameter	Description
URL	Enter the URL of the RSS feed from which the content is loaded.
Maximum Number of Entries	The maximum value is 20 entries. If you do not specify a value, 10 entries (if available) are retrieved from the RSS feed and inserted into the newsletter. If more entries are available in the RSS feed, they are ignored. If you enter 0, the default value of 10 entries is retrieved. This option is only applicable for the retrieval of RSS feeds. Changing this number does not affect the posts that have been loaded. Note that the **Category Filter** option is only applied *after* the entries are retrieved, so that fewer entries may be displayed.
Date Format	This option is only applicable for the retrieval of RSS feeds. Changing the date format does not affect the posts that have already been loaded.
Category Filter	Entries in the RSS feed are displayed by default. If your RSS feed is divided into different categories, you can filter them by a specific term, which is supplied in the **Categories** field of the RSS feed.

Button

See Click2Go.

SWYN

You can enable the SWYN function for social networks individually for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her

Parameter	Description
	Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
WhatsApp	
Parameters for WhatsApp are identical to Twitter's.	
Email	
Show	Lets recipients share the paragraph via email.
Title	Displays up to 50 characters as email subject if the recipient shares the paragraph via email. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph via email. If you enter nothing here, the standard text is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Xing	
Parameters for Xing are identical to Twitter's.	

Default values

These values are inherited from the RSS feed items integrated with this paragraph. When the RSS feed is retrieved, existing paragraphs are removed, and available entries are created as new paragraphs. These values can be overwritten if items are manually edited later.

Parameter	Description
Link	
Text	This text is subsequently linked in the mailing.
Alignment	You can position the link to the right, left, or center.
Link to Comments	
Text	This text is subsequently linked in the mailing.
Alignment	You can position the link to the right, left, or center.
Image	
Position	The image can be positioned in a separate column next to the heading where it follows the text, or in a separate column under the heading but next to the text. These positions are recommended in most cases. If you are using large images that take up the entire available width, you can position them centered under the heading, under the text, or below the link.

Options

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is

Parameter	Description
	based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Background Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Space Between the Items	To create height between the items, enter an integer value (pixels). By default, the first number in the **Padding** option is used. This option is only enabled when using the default layout.

© Optimizely 2022

Parameter	Description
Layout	In the **RSS Feeds** Tab in the general settings, specify the layouts for the RSS feed items. If there is no content available for the selected layout, the default layout is used.
Border	
Show	Check to apply a border around the paragraph.
Border Width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Table of Contents	

Parameter	Description
Show in Table of Contents	Select to display the paragraph in the table of contents for the section.
Area	Select whether the table of contents should display the heading of the RSS feed paragraph or the titles of individual articles in the RSS feed.
Alternative Table of Contents Entry	Optional: If you select the option **Show the heading of the RSS feed paragraph in the table of contents** under **Area**, you can change the heading of the RSS feed paragraph displayed in the table of contents.

Click profiles

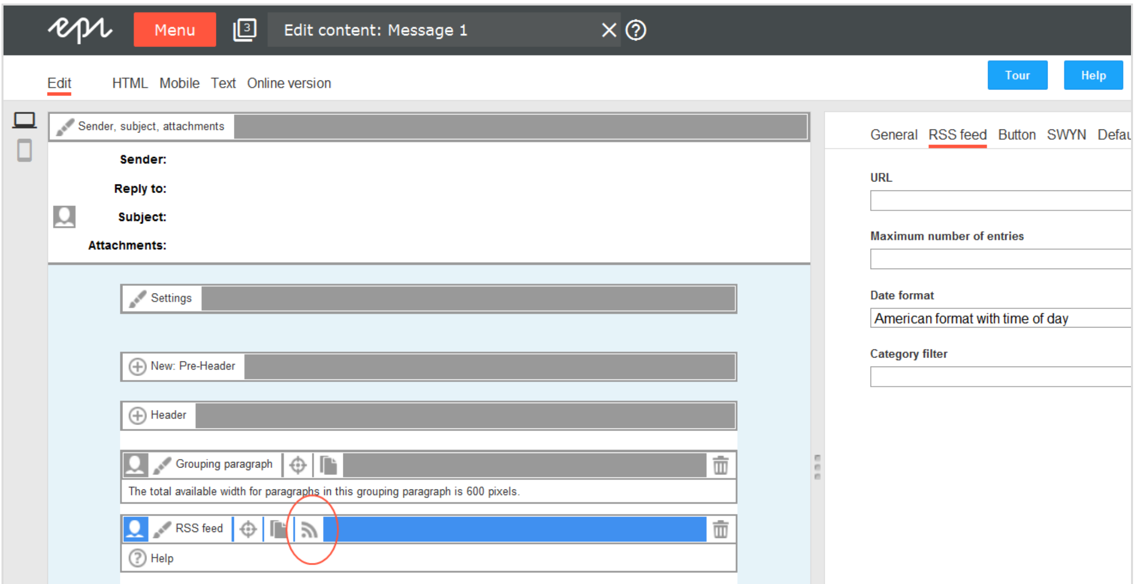
Parameter	Description
Click Profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target Groups	To show this paragraph to one or more target groups only, select them more than one target group is selected, just one must match (OR logic). See Target groups.

Retrieving an RSS feed

1. In the menu bar of the RSS feed paragraph, click the **RSS symbol** .



An information window opens. You are asked to confirm the retrieval of the RSS feed.

> **Note:** If you previously retrieved the RSS feed, the previously loaded and possibly edited content is overwritten with the current RSS feed content.

2. Click **Next**. The loaded RSS feed items are displayed to the left in the preview.

Editing an RSS feed

1. In the menu bar of the corresponding RSS feed item, click **RSS Feed**. On the right side, a window for editing the content of the RSS feed item opens.
2. Edit to the RSS items as desired.
3. Click **Apply**. The updated content is displayed to the left .

> **Note:** If you click **RSS** in the menu bar of the RSS feed paragraph, the RSS feed is retrieved again, and any edited feed articles are overwritten with the current feed content. So, if you modify RSS feed articles, only click **RSS** if you want to reset the changes.

Recommendations paragraph

Recommendation generators let you send individualized recommendations in real time mailings, any time a recipient accesses a mailing. Recommendations are based on recipient history and algorithms and retrieved via a URL. Depending on the provider, one or more URLs are made available to each recipient, which they can use to access a variety of elements:

- Recommendation image (such as product image)
- Recommendation text (shown as graphics, such as product name and description)
- Link to a landing page

The recommendation paragraph contains input fields for these URLs for multiple recommendations, providing you with additional layout options. You can place a recommendation paragraph within the header and footer area and inside grouping paragraphs. The Template Kit can contain multiple recommendation paragraphs. However, the recommendation provider can only provide a limited number of recommendations for a recipient.

> **Note: Fallback for new recipients and incomplete URLs**
>
> Store a fallback for your provider so new recipients with no history are shown a recommendation and so URLs with missing or incorrect parameters can be compensated for. Otherwise, an empty image placeholder might appear in the mailing, because no graphic could be retrieved from the recommendation server.

Formatting recommendation URLs

URLs for recommendations include multiple parameters that identify a customer, recipient, layout, type (text, image, or link), and number of recommendations (for more than one). A recommendation is only generated if parameters are generated correctly.

The following URL structure is an example. See the provider you have selected for details.

```
http://host:port/rde_server/res/[NL-RDE-ID]/newsletter/recomm/[Name-of-message-
template]/usr/[User-ID] ?requestType=textImage&recoIndex=[Index]&channel=NL
```

- **NL-RDE-ID**. Your customer ID; you receive this from the recommendation provider.
- **Name-of-message-template**. The template determines the recommendation stored for the recommendation provider.

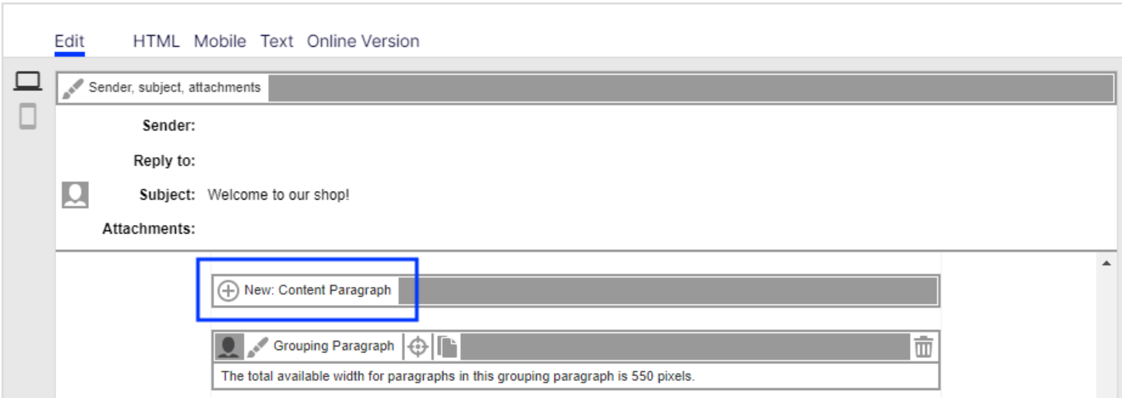
  > **Note:** You cannot modify the first two parameters.

- **User ID**. The recipient ID, used to generate individual recommendations.
- **Index**. Process multiple recommendations for each recipient. Use this parameter to select the corresponding, consecutive paragraph number.

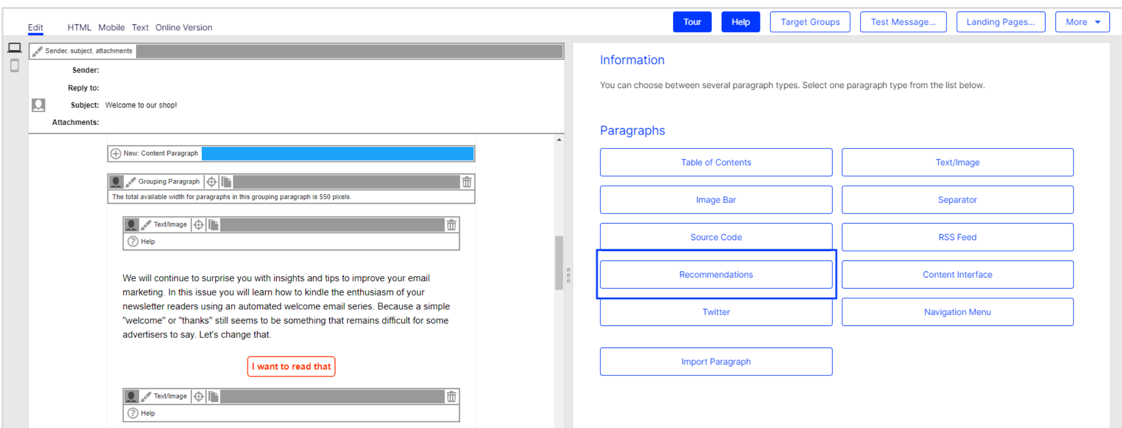
Creating a recommendations paragraph

1. While editing the mailing content in the Template Kit, click **New: Content Paragraph**.

   > **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.



2. Click **Recommendations**.



3. In the configuration window, click **Apply**. The new recommendation paragraph appears on the left.

Configuring a recommendation paragraph

1. On the left side of the preview, in the menu bar of the recommendation paragraph, click **Recommendations**.The configuration window opens on the right.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.
   - General
   - Button
   - Text

- SWYN
- Options
- Click profiles
- Target groups

General

Parameter	Description
Contents	
Heading	Enter a paragraph caption.
Show in Desktop Version	Select to include this paragraph in the desktop mailing.
Show in Mobile Version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in Text Version	Select to show the paragraph in the text version of the mailing.
Recommendation 1-5	
Image URL	Enter the URL used to generate the recommendation image that appears in a mailing. The height and width of the graphic is set by the recommendation provider and cannot be adjusted to fit the template.
Text URL	Enter the URL used to generate the recommendation text that appears in a mailing. The text is displayed as a graphics file. The height and width of the graphic is set by the recommendation provider and cannot be adjusted to fit the template.
Link	Enter the URL used to generate a link to the landing page that appears in a mailing. The layout of the links (color, text and so on) is set by the recommendation provider and cannot be adjusted to fit the template.

Button

See Click2Go.

Text

Recommendations are incorporated into mailings as graphics and are not displayed in the text version – except for the caption, if one is provided. Instead, you can enter a substitute text to use in the text version of the mailing. If you do not want the paragraph to appear in the text version, disable the **Show in Text Version** option in the **General** tab.

Parameter	Description
Text	Enter alternate text to use in the text version of a mailing. Recommendations will not appear in the text version, except for the caption.

SWYN

You can enable the SWYN function for social networks individually for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default Values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.

© Optimizely 2022

Parameter	Description
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard image is displayed. Lar-ger images are scaled down to this size.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
WhatsApp	
Parameters for WhatsApp are identical to Twitter's.	
Email	
Show	Lets recipients share the paragraph via email.
Title	Displays up to 50 characters as email subject if the recipient shares the para-

Parameter	Description
	graph via email. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph via email. If you enter nothing here, the standard text is displayed.
Xing	
Parameters for Xing are identical to Twitter's.	

Options

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Recommendation Layout	Images and text used in a recommendation can be placed next to or on top of each other. Bear in mind the available width when changing the layout.
Space Between Image and Text	Specify (in pixels) how much space there should be between image and text in a recommendation.
Space Between the Recommendations	Specify (in pixels) how much space there should be between multiple recommendations. This value is irrelevant if you are only inserting one recommendation.

© Optimizely 2022

Parameter	Description
Arrangement	Indicate whether multiple recommendations should be placed next to each other in one paragraph (for example, in the main body of the text space) or on top of each other (for example, in the sidebar next to the main body of the text space). This value is irrelevant if you are only inserting one recommendation.
Alignment	Specify how the recommendations should be arranged in a paragraph. This value is only applied if the width of recommendations is less than the width available in the main body of the text space.
Background Color	The background color is given as a Hex code.To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Recommendation Image	
Width	Enter the width of the recommendation image. If you do not enter anything here, the image's original width is used.
Height	Enter the height of the recommendation image. If you do not enter anything here, the image's original height is used.
Recommendation Text	
Width	Enter the width of the recommendation text. If you do not enter anything here, the text's original width is used.

Parameter	Description
Height	Enter the height of the recommendation text. If you do not enter anything here, the text's original height is used.
Border	
Show	Select if you want to apply a border around the entire paragraph.
Border Width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	To define the color, enter a hexadecimal value preceded by **#** (such as #000000). The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Maximum Width of the Text Image	The maximum width is entered as a percentage. It only takes effect if the text is positioned to the left or the right of the image. The value must be between 10 and 90. By default, a maximum width of 50 % is used.

© Optimizely 2022

Parameter	Description
Table of Contents	
Show in Table of Contents	Check to display the paragraph in the table of contents for the section.
Alternative Table of Contents Entry	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the heading from the **General** tab is displayed.

Click profiles

Parameter	Description
Click Profile	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target Groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups.

Facebook paragraph

> **Note:** To enable this feature, contact customer support.

Use the Facebook paragraph to integrate up to 25 current Facebook posts into a message. Keep recipients up-to-date with exciting topics from your social network.

Decide whether Optimizely Campaign updates the Facebook paragraph every time you send a message and automatically loads the latest posts from your Facebook timeline, or whether Optimizely Campaign only displays Facebook posts you defined when creating or modifying the campaign.

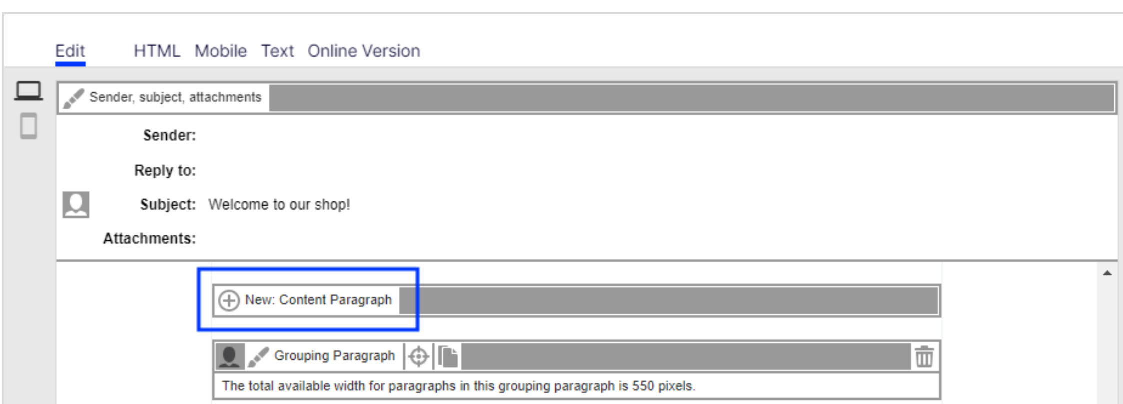
- **Dynamic integration**. Displays your latest social media activities. However, you cannot permanently delete or edit posts in the Facebook paragraph. If you remove or edit Facebook timeline posts from the Facebook paragraph, those posts are reloaded into the Facebook paragraph when the mailing is sent.
- **Static integration**. Provides more control over posts that appear in the Facebook paragraph. When creating a message, you can manually update which posts to integrate. You can delete individual posts. When the mailing is sent, Optimizely Campaign does not update the Facebook paragraph from your Facebook timeline. Changes can be made but do not happen automatically.

> **Tip:** By default, Optimizely Campaign integrates Facebook posts statically. To use dynamic integration, contact customer support to change the default integration.

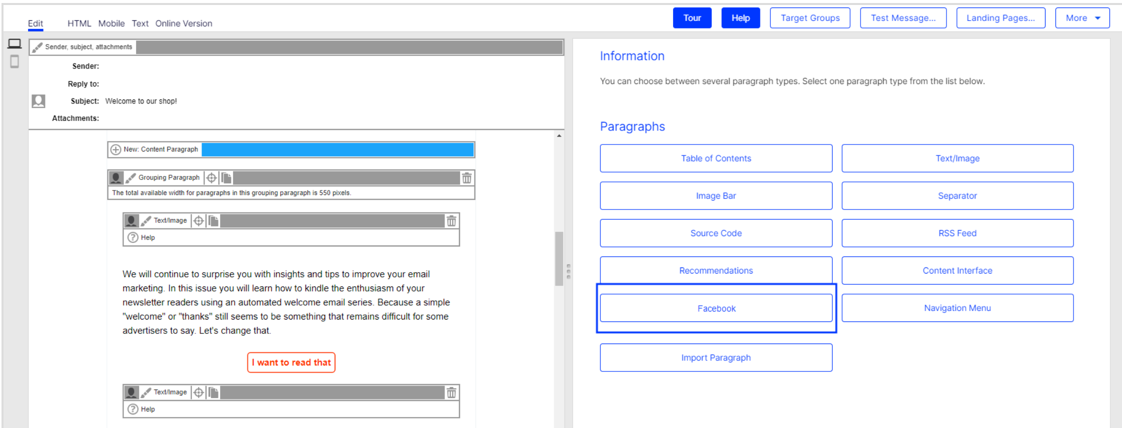
Creating a Facebook paragraph

1. While editing the mailing content in the Template Kit, click **New: Content paragraph**.

   > **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.

2. Click **Facebook**.



3. In the configuration window, click **Apply**. The new Facebook paragraph appears on the left.

Configuring a Facebook paragraph

1. On the left side of the preview, in the menu bar of the Facebook paragraph, click **Facebook**. The configuration window opens on the right side.
2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.
   - General
   - Settings
   - Button
   - SWYN
   - Default values
   - Options
   - Click profiles
   - Target groups

General

Parameter	Description
Content	
Heading	Enter a heading for the paragraph.
Show in desktop version	Select to include this paragraph in the desktop mailing.
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in text version	Select to show the paragraph in the text version of the mailing.
Link	
Text	This text is subsequently linked to in the mailing.
URL	Enter a link , such as the starting page or your public Facebook profile.
Orientation	Position the link on the right, left, or center.

Settings

Parameter	Description
Account name	Enter your public Facebook user name, which is the name used in the web address for your Facebook timeline. It is the last part of the URL: https://-facebook.com/*User name*.

© Optimizely 2022

Parameter	Description
	Warning: If the display of your Facebook page is limited to specific countries, Facebook posts will not load if you or your recipients are located outside of the countries for which the display is allowed.
Maximum number of entries	Enter the maximum number (up to 25) of Facebook posts to be displayed in your message. **Tip:** If you enter 0 or leave this field blank, a default value of 10 Facebook posts are used. If fewer than 10 posts are available in your Facebook account, fewer posts are retrieved and displayed. Also, if you are using static integration, changing this value has no effect on any posts already retrieved. You must manually update the Facebook paragraph for the new number of posts to take effect.
Date format	In the drop-down list, select a date format to be displayed next to your Facebook posts. **Tip:** If using static integration, changing the date format has no effect on Facebook posts that have already been retrieved. You must manually update the Facebook paragraph for a date format change to take effect.

Button

See Click2Go.

SWYN

You can enable the SWYN function for social networks individually for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her

Parameter	Description
	Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
WhatsApp	
Parameters for WhatsApp are identical to Twitter's.	
Email	
Show	Lets recipients share the paragraph via email.
Title	Displays up to 50 characters as email subject if the recipient shares the paragraph via email. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph via email. If you enter nothing here, the standard text is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Xing	
Parameters for Xing are identical to Twitter's.	

Default values

Parameter	Description
Link	
Text	Facebook posts in your messages are automatically linked to the original Facebook post. To clarify this for your recipients and to highlight links, add additional text, such as *More information on our Facebook page* or *Go to original post on Facebook.* Enter your text into the airfield you do not want to point out that the Facebook post in your mailing will lead to your Facebook page, leave the field blank. **Tip:** Text entered here is added to Facebook posts and appears with each Facebook post in the message.
Orientation	The text can be aligned to the right, left or center.
Image	
Position	From the drop-down list, select the position where images associated with your Facebook post will display. **Tip:** If your Facebook post contains several images, the first image from the post is assiduous cannot display subsequent images.

Options

You can give each content paragraph a different appearance from the general layout.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Background color	The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Space between articles	A space with this height is placed between individual admissible default, the first number in the **Padding** option is osteopathic option is only enabled when using the default layout.
Layout	Select a layout for your Facebook posts. You can choose between the supplied default layout and up to two user-defined absolutist use a custom layout, set it up in advance in the general settings in the **Facebook** evadable you select a user-defined layout list that you have not configured, the default layout is automatically used. See Facebook layouts.

Parameter	Description
Border	
Show	Select if you want to apply a border around the entire paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Table of contents	
Show in table of contents	Select to display the paragraph in the table of contents for the section.
Alternative table of contents entry	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the heading from the **General** tab is displayed.

Click profiles

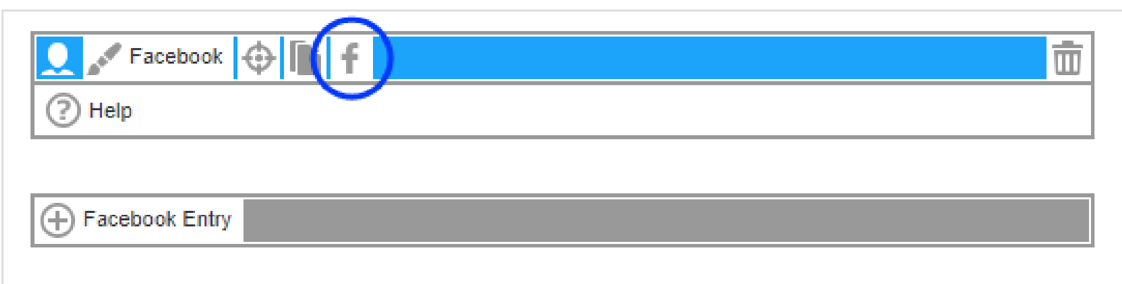
Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them more than one target group is selected, just one must match (OR logic). See Target groups.

Loading Facebook posts

1. In the menu bar of the Facebook paragraph, click **Load Facebook posts** .



2. In the configuration window, click **Next**.

> **Warning:** If the display of your Facebook page is limited to specific countries and you are located outside of these countries, Facebook posts will not load successfully.

You can also manually update your Facebook posts in the Facebook paragraph afterwards and reload them from your Facebook timeline. To do this, click **Load Facebook posts** again.

Editing Facebook posts

You can edit your Facebook posts individually after loading them into your mailing.

1. In the menu bar of the corresponding Facebook post, click **Facebook Entry**.The configuration window opens on the right.
2. Change the settings according to your needs. Confirm by clicking **Apply** in the lower right corner.

> **Note:** If you manually update posts in the Facebook paragraph, the posts are reloaded from your Facebook timeline, overwriting any manual changes to the Facebook posts. If you are using dynamic integration, manual changes to Facebook posts are overwritten when the mailing is sent.

Deleting Facebook posts

1. In the menu bar of the Facebook post you want to delete, click **Delete** .
2. Confirm your selection by clicking **OK**.

> **Note:** If you manually update posts in a Facebook paragraph, previously deleted posts are reloaded unless they were also deleted from your Facebook timeline. If you are using dynamic integration, deleted Facebook posts are automatically reloaded into your message when the mailing is sent.

Facebook layouts

This topic describes:

- how customer support sets up alternative HTML layouts
- how to select alternative layouts in the Facebook paragraph
- how to edit alternative layouts using knowledge of HTML, CSS, and Velocity

To receive up to 2 alternative layouts, contact customer support.

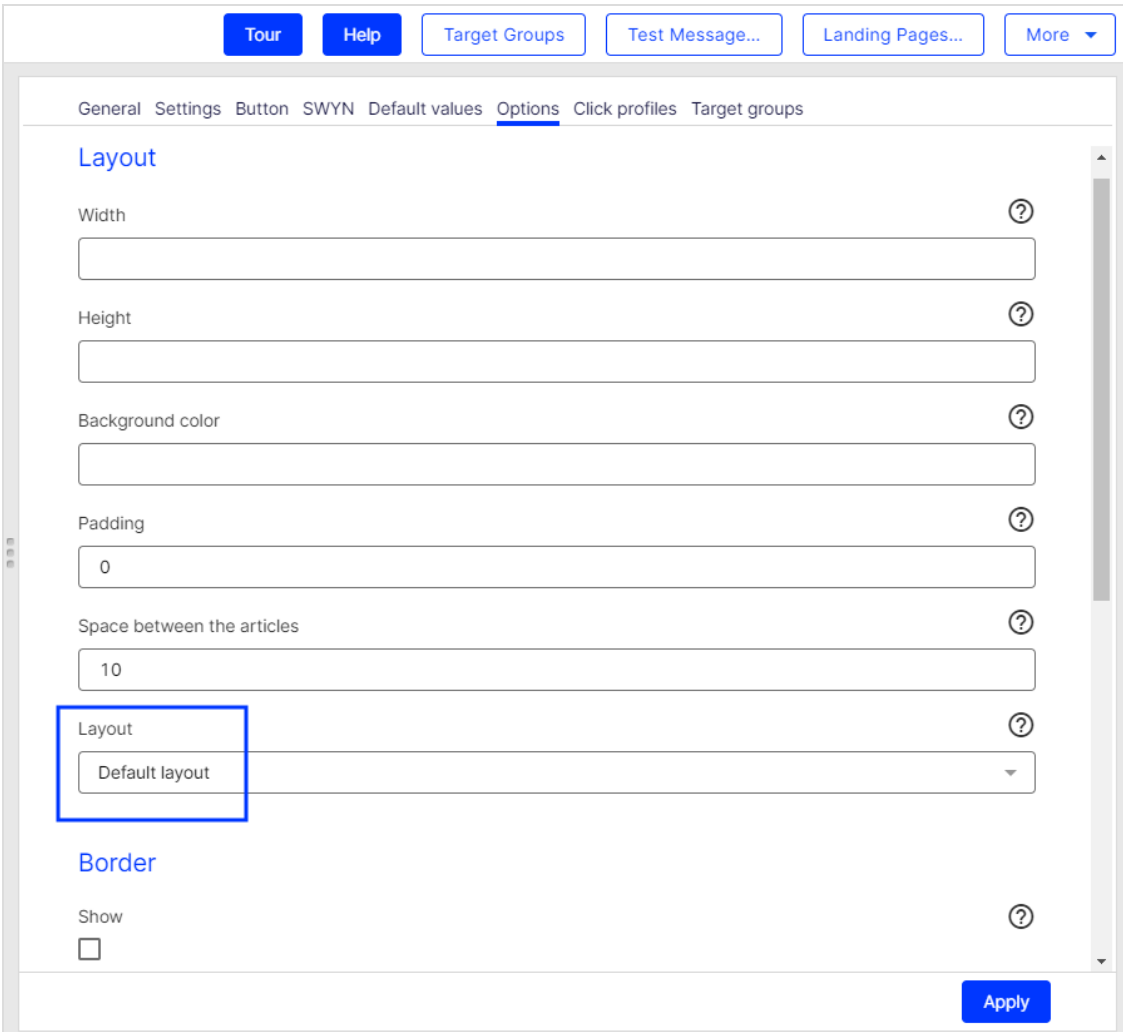
To create HTML layouts, set up alternative layouts for mobile and text versions also. If no alternative layouts are saved for those versions, the default layout is used.

> **Note:** In some cases, some text elements will not be in the order that you want.

Selecting a layout

1. To select a default layout or an alternative layout, while editing a message in the Template Kit, on the left side of the preview, in the menu bar of the Facebook paragraph, click **Facebook**. The configuration window opens on the right side.
2. Click the **Options** tab.

3. In the **Layout** area, in the **Layout** drop-down list, select the layout you want to use.



4. Click **Apply**.

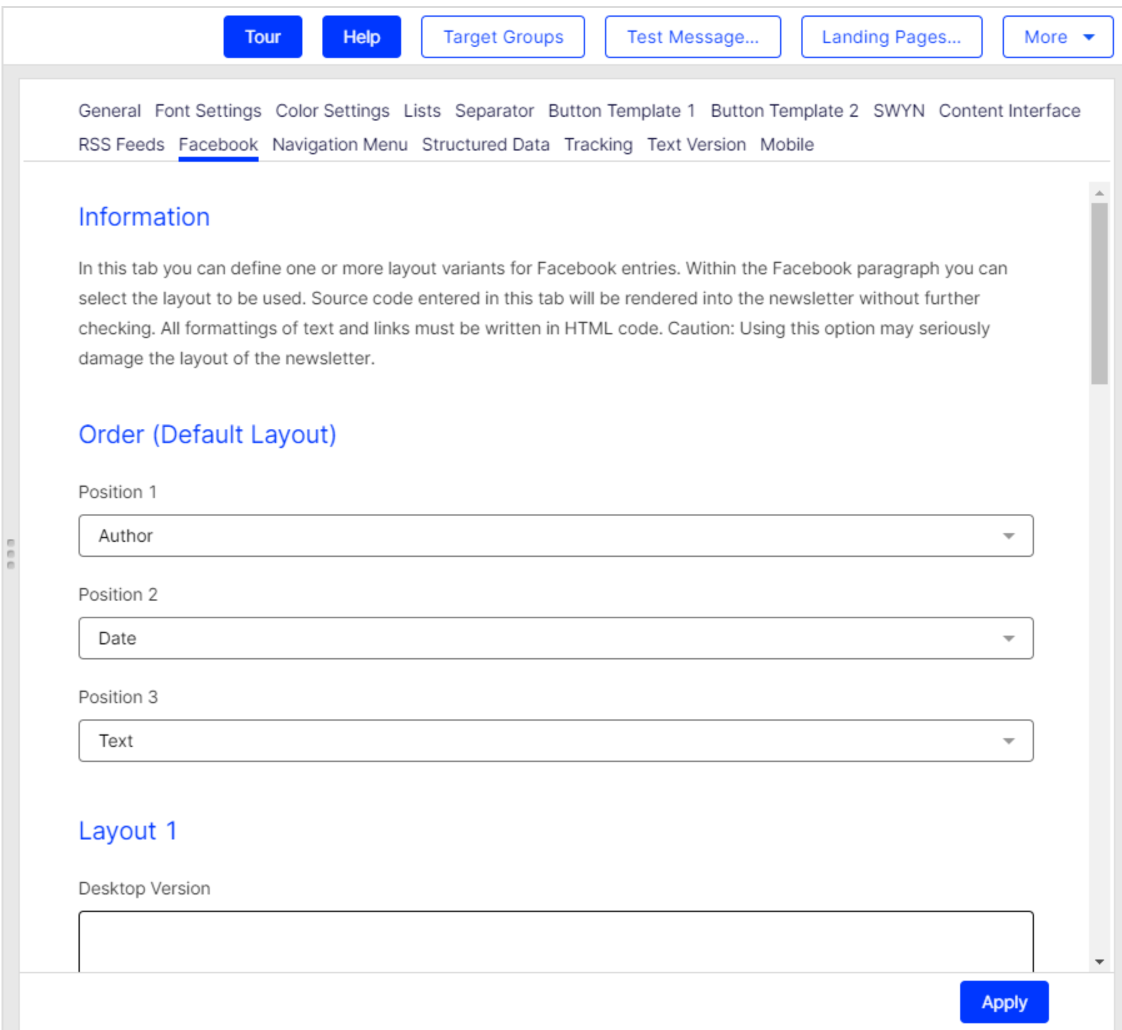
Editing a layout

You can edit alternative layouts but not the default layout.

> **Warning:** If you lack knowledge of HTML, CSS, and Velocity, contact customer support to edit the alternative layouts. If you edit them without in-depth knowledge, serious display errors may occur in your

> mailings.

1. To edit alternative layouts, in the preview on the left, click **Settings**. The configuration window opens on the right.
2. Open the **Facebook** tab. Each layout has source text fields for the desktop, mobile, and text versions.



3. Edit the source text of the corresponding layout according. Under Inserting content, read how to place the various content items.

> **Tip:** Set up alternative layouts for mobile and text versions also. If no alternative layouts are stored for these versions, the default layout is used.

4. Click **Apply**.

Inserting content

Access the content of the Facebook paragraph using Velocity variables and format the transferred content using HTML style attributes.

The following Velocity variables are available:

- **Status**. Information on current item paragraphs
- **Present**. For using queries that check for the presence of an element
- **Value**. For issuing the content

Notes for the creation of new layouts

- **Font definitions**. If you are using an alternative layout variant, font definitions must exist in the HTML you entered. The texts are not formatted by the Template Kit to give you complete freedom in visual design.
- **Widths**. Specify a fixed width or a width in percent. You should enter a percentage, because this prevents elements from sticking out of the layout.
- **Danger of display errors**. If you edit the layouts without in-depth knowledge of HTML, serious display errors may occur in your mailings.

Status variables

Variable	Type	Description
$facebookItemFirst	Boolean	Is `true` if it is the first post in the Facebook paragraph, or is otherwise `false`.
$facebookItemIndex	Integer	Contains the position of the post within the Facebook paragraph as a number (1 for the first post, 2 for the second post and so on).

© Optimizely 2022

Variable	Type	Description
$facebookItemLast	Boolean	Is `true` if it is the last post in the Facebook paragraph, or is otherwise `false`.

Present variables

Variable	Type	Description
$facebookTextPresent	Boolean	Contains `true` if there is content for the **Text** box, or otherwise `false`.
$facebookAuthorPresent	Boolean	Contains `true` if there is content for the **Author** box, or otherwise `false`.
$facebookDatePresent	Boolean	Contains `true` if there is content for the **Date** box, or otherwise `false`.
$facebookLinkTextPresent	Boolean	Contains `true` if there is content for the **Text** box in the **Link** area, otherwise `false`.
$facebookLinkUrlPresent	Boolean	Contains `true` if there is content for the **URL** box in the **Link** area, otherwise `false`.
$facebookImageUrlPresent	Boolean	Contains `true` if there is content for the **Image** box in the **Image** tab, otherwise `false`.
$facebookImageAltTextPresent	Boolean	Contains `true` if there is content for the **Alternative text** box in the **Image** tab, otherwise `false`.
$facebookImageLinkPresent	Boolean	Contains `true` if there is content for the **Link** box in the **Image** tab, otherwise `false`.

Value variables

Variable	Typ	Description
$facebookTextValue	String	Contains the content of the **Text** box.
$facebookAuthorValue	String	Contains the content of the **Author** box.
$facebookDateValue	String	Contains the content of the **Date** box.
$facebookLinkTextValue	String	Contains the content of the **Text** box in the **Link** area.
$facebookLinkUrlValue	String	Contains the content of the **URL** box in the **Link** area.
$facebookImageUrlValue	String	Contains the image URL from the **Image** tab.
$facebookImageAltTextValue	String	Contains the content of the **Alternative text** box in the **Image** tab.
$facebookImageLinkValue	String	Contains the content of the **Link** box in the **Image** tab.
$editBar	String	Inserts the paragraph's button bar. This is required to integrate the button bar into the table, such as when implementing adjacent items. If this variable is not available, the button bar is placed above the item.

Twitter paragraph

> **Note:** To enable this feature, contact customer support.

Use the Twitter paragraph to integrate up to 20 current tweets into your messages. Keep your recipients up-to-date with exciting topics from your social network.

Decide whether Optimizely Campaign updates the Twitter paragraph every time you send a message and automatically loads the latest tweets from your Twitter timeline, or if Optimizely Campaign only displays tweets you defined when creating or modifying the campaign.

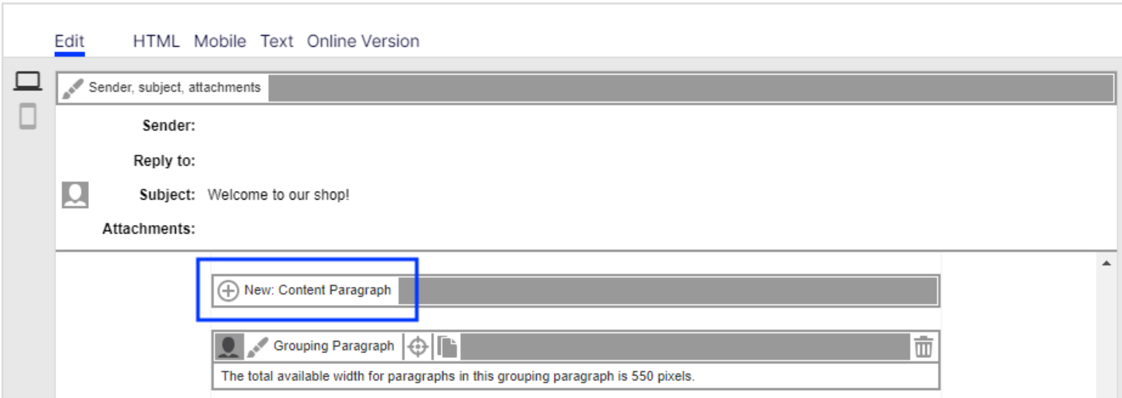
- **Dynamic integration**. Displays your latest social media activities. However, you cannot permanently delete or edit individual tweets in the Twitter paragraph. If you remove or edit tweets in the Twitter paragraph which are still present in your Twitter timeline, the removed or edited tweets are reloaded when the mailing is sent and inserted into the Twitter paragraph.
- **Static integration**. Provides more control over the tweets in the Twitter paragraph. When creating a mailing, you can select which of your current tweets should be integrated. You can delete individual tweets. When the mailing is sent, Optimizely Campaign does not update the Twitter paragraph from your Twitter timeline. Changes can still be made, but do not happen automatically. When using static integration, you can update tweets manually.

> **Tip:** By default, Optimizely Campaign integrates your tweets statically. To use dynamic integration, contact customer support.

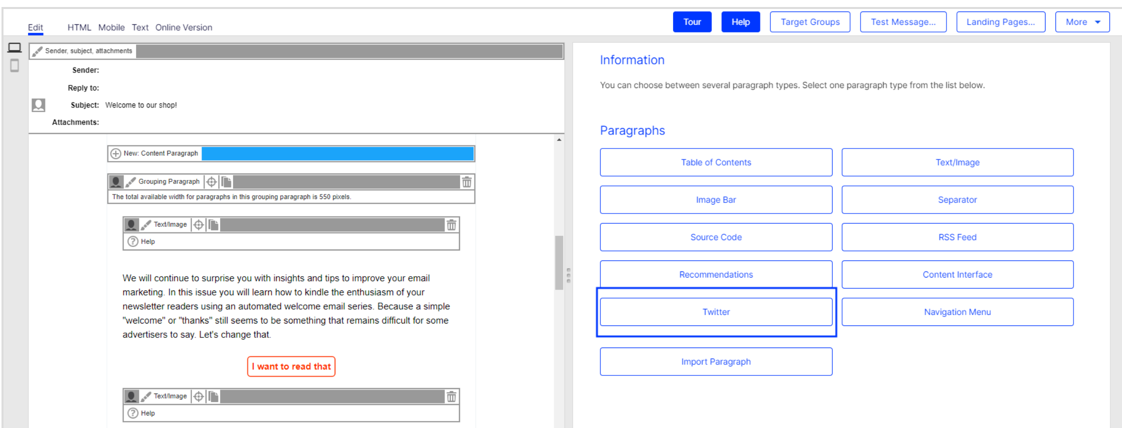
Creating a Twitter paragraph

1. While editing the mailing content in the Template Kit, click **New: Content Paragraph**.

   > **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.



2. Click **Twitter**.



3. In the configuration window, click **Apply**. The new Twitter paragraph appears on the left.

Configuring a Twitter paragraph

1. On the left side of the preview, in the menu bar of the Twitter paragraph, click **Twitter**. The configuration window opens on the right.
2. See the following tables to set options in the corresponding tabs. To confirm your settings, click **Apply**.
   - General
   - Settings
   - Button

- SWYN
- Default values
- Default values
- Options
- Click profiles
- Target groups

General

Parameter	Description
Content	
Heading	Enter a heading for the paragraph.
Show in desktop version	Select to include this paragraph in the desktop mailing.
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in text version	Select to show the paragraph in the text version of the mailing.
Link	
Text	This text is subsequently linked to in the mailing.
URL	Enter a link here (for example, the landing page for the product group).
Orientation	Position the link on the right, left, or center.

Settings

Parameter	Description
Account name	Enter your public Twitter user name, the name used in the web address for your Twitter timeline. It is the last part of the URL: https://twitter.com/*User name*.
Maximum number of entries	Enter the maximum number of tweets that should be displayed in your message. The maximum value for this is 20 tweets. If you enter 0 into this field or leave it empty, a default value of 10 tweets is used (if fewer than 10 tweets are available in your Twitter account, those tweets are displayed). Also, when using static integration, changing this value has no effect on any tweets already retrieved. You must manually update the Twitter paragraph for the new number to take effect.
Date format	In the drop-down list, select a date format to be used next to your tweets. Changing the date format has no effect on tweets that already were retrieved when using static integration. You must manually update the Twitter paragraph for the date format change to take effect.

Button

See Click2Go.

SWYN

You can enable the SWYN function for social networks individually for each paragraph. To allow sharing of these paragraphs in a social network, select the **Show** check box for the network in which you want them to appear.

Parameter	Description
General	

© Optimizely 2022

Parameter	Description
Alignment	Links (symbols and text) and the introduction text are right-aligned.
Position	Links (symbols and text) and the introduction text are positioned at the bottom edge of the paragraph.
Default values	
Title	Displays up to 50 characters in the user's profile if the user shares the paragraph over a social network, as long as no other title is indicated for that network.
Text	Displays up to 250 characters in the user's profile if the user shares the paragraph over a social network, as long as no other text is specified for that network.
Image	Displays up to 100 x 100 pixels in the user's profile next to the text if the user shares the paragraph over a social network, as long as no other image is specified for that network. Larger images are scaled down to this size.
Facebook	
Show	Lets recipients share the paragraph via their Facebook profile.
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard text is displayed.
Image	Displays up to 100 x 100 pixels if the recipient shares the paragraph on his or her Facebook profile. If you enter nothing here, the standard image is displayed. Larger images are scaled down to this size.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Twitter	
Show	Lets recipients share the paragraph via their Twitter account.

Parameter	Description
Title	Displays up to 50 characters if the recipient shares the paragraph on his or her Twitter profile. If you enter nothing here, the standard title is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
WhatsApp	
Parameters for WhatsApp are identical to Twitter's.	
Email	
Show	Lets recipients share the paragraph via email.
Title	Displays up to 50 characters as email subject if the recipient shares the paragraph via email. If you enter nothing here, the standard title is displayed.
Text	Displays up to 250 characters if the recipient shares the paragraph via email. If you enter nothing here, the standard text is displayed.
Redirect	Creates a landing page that displays the content of the linked paragraph. If you enable, the link redirects recipients to the URL specified in the **General** tab.
Xing	
Parameters for Xing are identical to Twitter's.	

Default values

Parameter	Description
Link	
Text	Tweets in your message are automatically linked to the original tweet on your Twitter page.

© Optimizely 2022

Parameter	Description
	To clarify this and highlight links, add additional text, for example, "More information on our Twitter page" or "View original tweet". That text appears with each tweet in your message.
Orientation	The text can be aligned to the right, left or center.
Image	
Position	From the drop-down list, select the position where an image associated with your tweet (if any) should be displayed.

Options

To give each content paragraph a different appearance from the general layout, use the layout configuration in this tab.

Parameter	Description
Layout	
Width	The maximum available width is used as standard. This is based on the internal spacing and also depends on whether you are using a sidebar and, if so, on the width of the sidebar. Enter a different value in pixels. If the maximum available width is smaller than this value, then the entered value is ignored.
Height	By default, the paragraph is displayed over the available height, considering the content. Alternatively, you can specify a fixed height. If the content exceeds this height, the value is ignored, and the content is displayed at the default height.
Background color	The depiction of non-hex web colors may vary from the original, depending on the browser.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries:

© Optimizely 2022

Parameter	Description
	• 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Space between articles	A space with this height is placed between individual items. By default, the first number in the **Padding** option is used.This option is only enabled when using the default layout.
Layout	Select a Twitter layout. You can choose between the default layout and up to two user-defined layouts. To use a custom layout, set it up in advance in the general settings in the Twitter tab. If you select a user-defined layout that is not configured, the default layout is used.
Border	
Show	Select if you want to apply a border around the entire paragraph.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left. If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	The depiction of non-hex web colors may vary from the original, depending on the browser.

© Optimizely 2022

Parameter	Description
Mobile	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.
Table of contents	
Show in table of contents	Select to display the paragraph in the table of contents for the section.
Alternative table of contents entry	Enter a heading to be displayed for this section in the table of contents. If you enter nothing, the heading from the **General** tab is displayed.

Click profiles

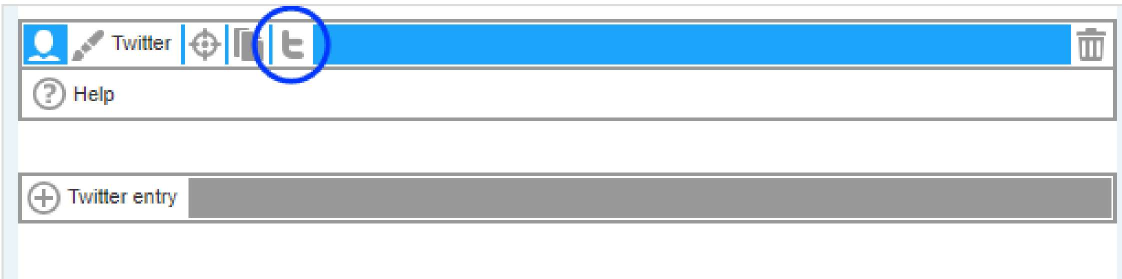
Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles. Alternatively, you can allocate individual links to a click profile in the **Tracking** settings for the mailing creation wizard.

Target groups

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups.

Loading tweets

1. In the menu bar of the Twitter paragraph, click **Load tweets** .



2. In the configuration window, click **Next**.

You can also manually update your tweets in the Twitter paragraph afterwards and reload them from your Twitter timeline. To do this, click **Load tweets** again.

Editing tweets

You can edit tweets individually after loading them into your mailing.

1. In the menu bar of the corresponding tweet, click **Twitter entry**.The configuration window opens on the right.
2. Change the settings as needed and confirm your entries by clicking **Apply**.

> **Tip:** If you manually update tweets in the Twitter paragraph, the posts are reloaded from your Twitter timeline, overwriting any manual changes to the tweets. If you are using dynamic integration, manual changes to tweets are overwritten when the mailing is sent.

Deleting tweets

1. In the menu bar of the tweet you want to delete, click **Delete** .
2. Click **OK**.

Twitter layouts

This topic describes:

- how customer support sets up alternative HTML layouts
- how to select alternative layouts in the Twitter paragraph
- how to edit alternative layouts using HTML, CSS, and Velocity

To receive up to two alternative layouts, contact customer support.

To create HTML layouts, set up alternative layouts for mobile and text versions also. If no alternative layouts are saved for those versions, the default layout is used.

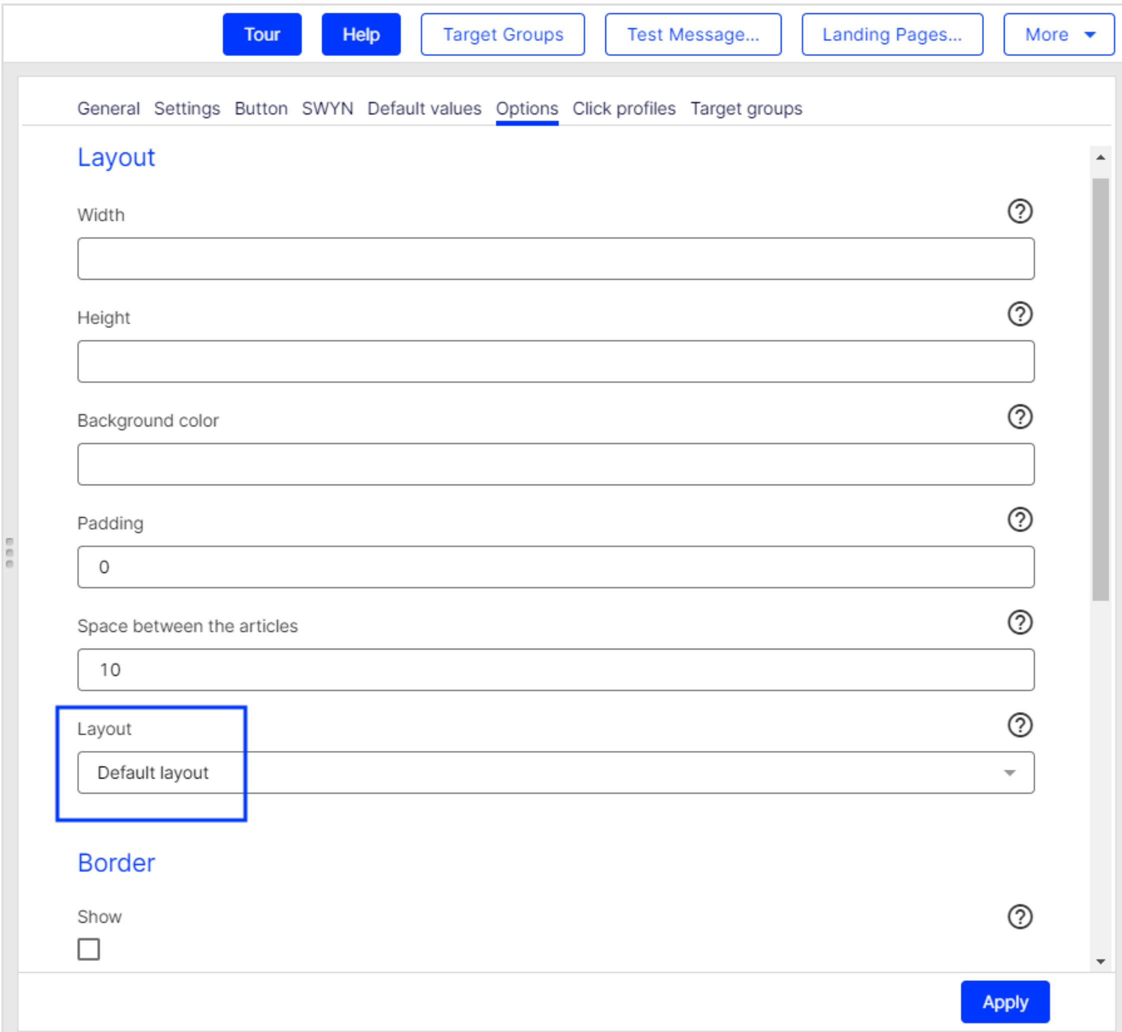
> **Note:** In some cases, some text elements will not be in the order that you want.

Selecting a layout

To select a default layout or one of up to 2 alternative layouts, while editing a message in the Template Kit, do the following:

1. On the left side of the preview, in the menu bar of the Twitter paragraph, click **Twitter**. The configuration window opens on the right.
2. Click the **Options** tab.

3. In the **Layout** area > **Layout** drop-down list, select the layout you want to use.



4. Click **Apply**.

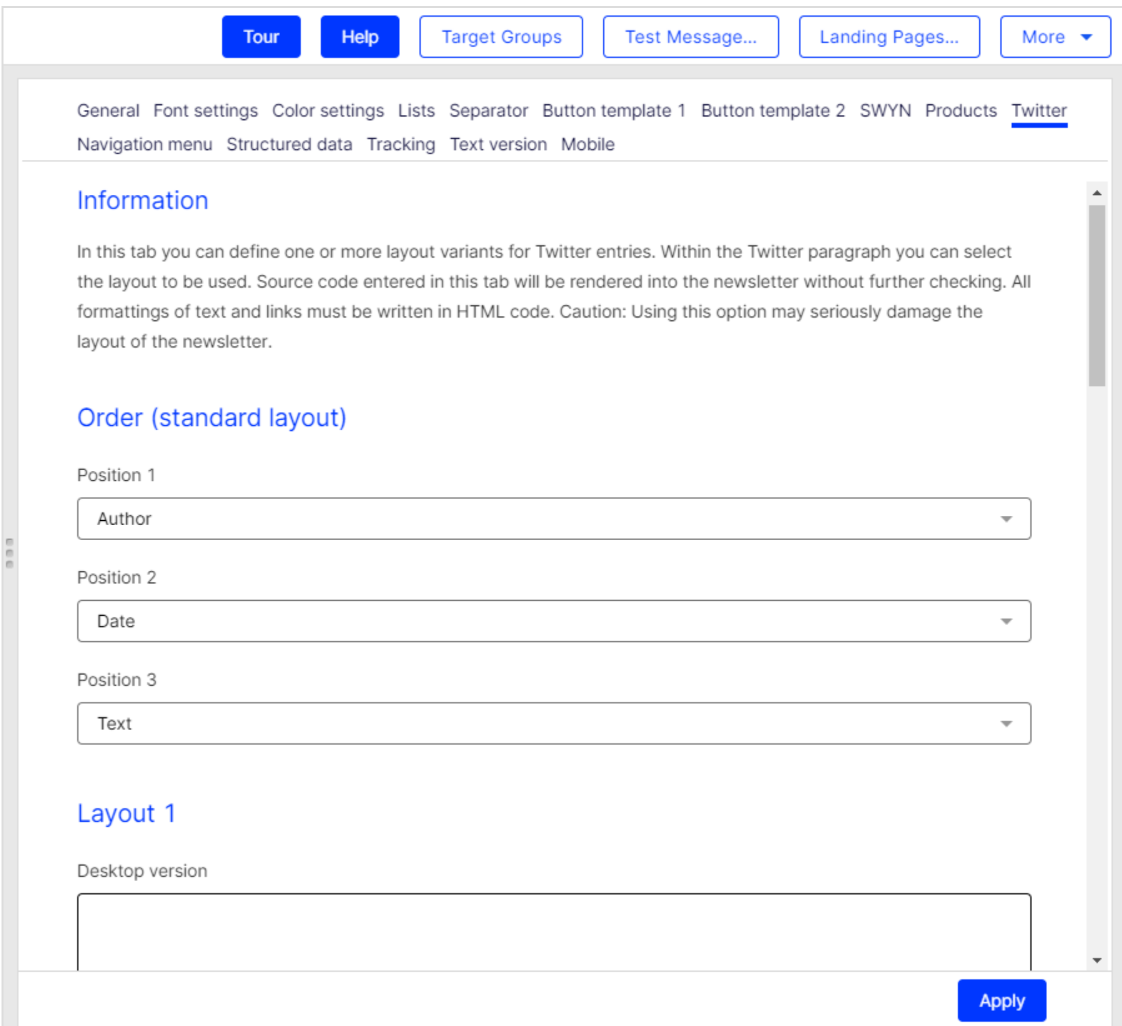
Editing a layout

You can edit alternative layouts, but not the default layout.

> **Warning:** If you lack knowledge of HTML, CSS, and Velocity, contact customer support to edit the alternative layouts. If you edit them without in-depth knowledge, serious display errors may occur in your

> mailings.

1. In the preview on the left, click **Settings**. The configuration window opens on the right.
2. Open the **Twitter** tab. Each layout has source text fields for the desktop, mobile, and text versions.



3. Edit the source text of the corresponding layout as needed. Under Inserting content, read how to place the various contents.

> **Tip:** Set up alternative layouts for mobile and text versions also. If no alternative layouts are stored for these versions, the default layout is used.

4. Click **Apply**.

Inserting content

Access the content of the Twitter paragraph using Velocity variables and format the transferred content using HTML style attributes.

The following Velocity variables are available:

- **Status**. Information on current item paragraphs
- **Present**. For using queries that check for the presence of an element
- **Value**. For issuing the content

Notes for the creation of new layouts

- **Font definitions**. If you are using an alternative layout variant, font definitions must exist in the HTML you entered. The texts are not formatted by the Template Kit to give you complete freedom in visual design.
- **Widths**. Specify a fixed width or a width in percent. You should enter a percentage, because this prevents elements from sticking out of the layout.
- **Danger of display errors**. If you edit the layouts without in-depth knowledge of HTML, serious display errors may occur in your mailings.

Status variables

Variable	Type	Description
$twitterItemFirst	Boolean	Is `true` if it is the first tweet in the Twitter paragraph, or is otherwise `false`.
$twitterItemIndex	Integer	Contains the position of the post within the Twitter paragraph as a number (1 for the first tweet, 2 for the second tweet and so on).

Variable	Type	Description
$twitterItemLast	Boolean	Is `true` if it is the last tweet in the Twitter paragraph, or is otherwise `false`.

Present variables

Variable	Type	Description
$twitterTextPresent	Boolean	Contains `true` if there is content for the **Text** box, or otherwise `false`.
$twitterAuthorPresent	Boolean	Contains `true` if there is content for the **Author** box, or otherwise `false`.
$twitterDatePresent	Boolean	Contains `true` if there is content for the **Date** box, or otherwise `false`.
$twitterLinkTextPresent	Boolean	Contains `true` if there is content for the **Text** box in the **Link** area, otherwise `false`.
$twitterLinkUrlPresent	Boolean	Contains `true` if there is content for the **URL** box in the **Link** area, otherwise `false`.
$twitterImageUrlPresent	boolean	Contains `true` if there is content for the **Image** box in the **Image** tab, otherwise `false`.
$twitterImageAltTextPresent	Boolean	Contains `true` if there is content for the **Alternative text** box in the **Image** tab, otherwise `false`.
$twitterImageLinkPresent	Boolean	Contains `true` if there is content for the **Link** box in the **Image** tab, otherwise `false`.

Value variables

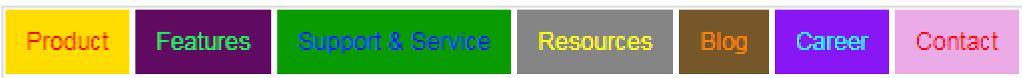
Variable	Type	Description
$twitterTextValue	String	Contains the content of the **Text** box.
$twitterAuthorValue	String	Contains the content of the **Author** box.
$twitterDateValue	String	Contains the content of the **Date** box.
$twitterLinkTextValue	String	Contains the content of the **Text** box in the **Link** area.
$twitterLinkUrlValue	String	Contains the content of the **URL** box in the **Link** area.
$twitterImageUrlValue	String	Contains the image URL from the **Image** tab.
$twitterImageAltTextValue	String	Contains the content of the **Alternative text** box in the **Image** tab.
$twitterImageLinkValue	String	Contains the content of the **Link** box in the **Image** tab.
$editBar	String	Inserts the paragraph's button bar. This is required to integrate the button bar into the table, such as when implementing adjacent items. If this variable is not available, the button bar is placed above the item.

Navigation menu

> **Note:** To enable this feature, contact customer support.

With the navigation menu paragraph type, you can create navigation bars with links to landing pages or deep links. And, you can add and edit menu items with no HTML knowledge.

Navigation menu example:



Range of functions

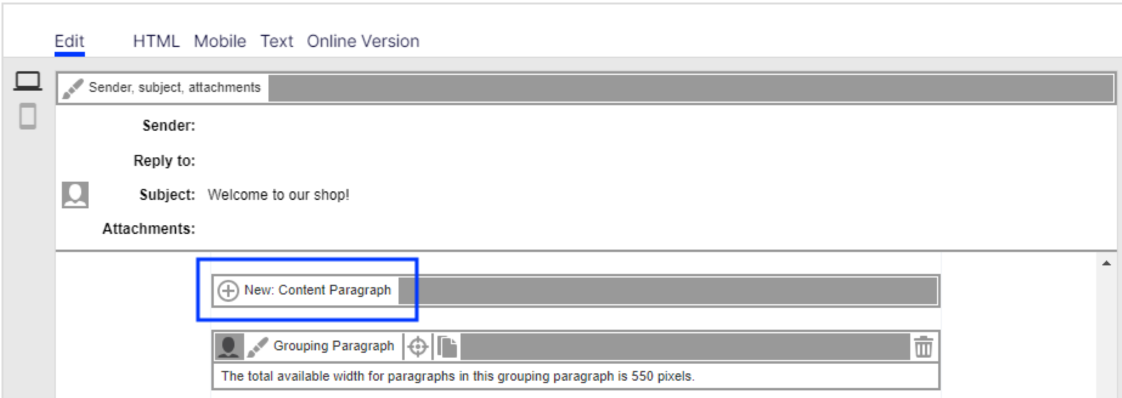
- Can design each menu item individually: Text and background color, as an image or with an icon.
- Create up to 10 menu items.
- Store up to five user-defined layouts and apply them to the navigation menu.
- In the mobile version, you can display navigation in two or three columns or as a *hamburger menu.*The hamburger menu offers the following advantages:
  - simple/minimalistic; can be used almost anywhere in the layout
  - navigation can be folded in and out
  - space-saving display for small screens

Creating a navigation menu

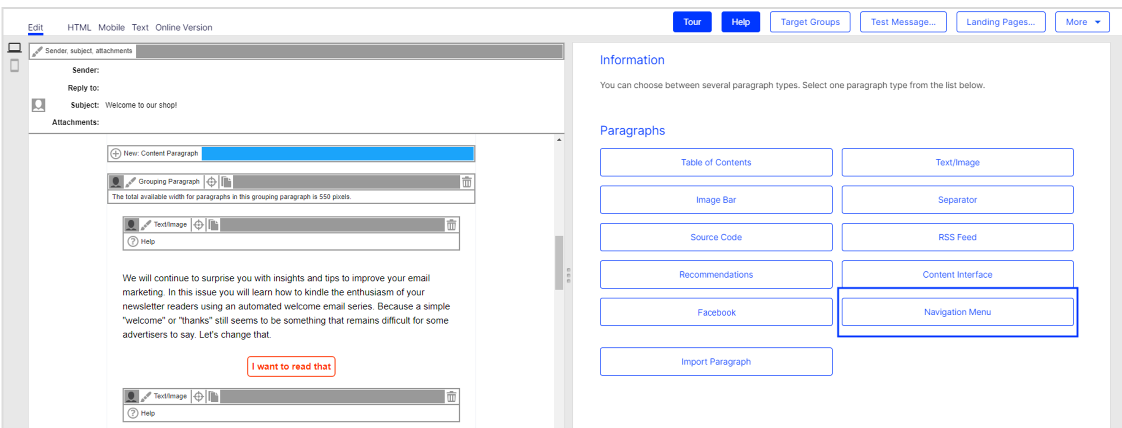
1. While editing the mailing content in the Template Kit, click **New: Content Paragraph**.

> **Tip:** You can also use the paragraph in the header and footer area by clicking **Header** or **Footer**.

© Optimizely 2022



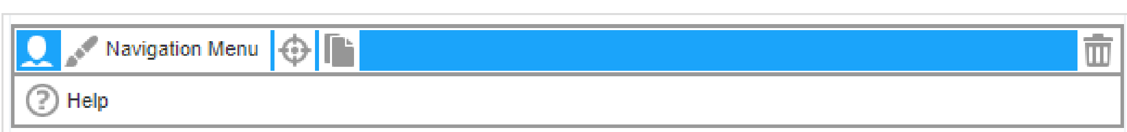
2. Click **Navigation menu**.



3. In the configuration window, click **Apply**. The new navigation menu appears on the left, in the preview window.

Configuring a navigation menu

1. Click **Navigation Menu** on the left side of the preview.



2. See the following tables to set options in the corresponding tabs. Click **Apply** to confirm your settings.

General

Parameter	Description
Content	
Show in desktop version	Select to include this paragraph in the desktop mailing.
Show in mobile version	Select to show the paragraph in the mobile version of the mailing. The **Activate mobile version** setting in the general settings must be activated for this option to take effect.
Show in text version	Select to show the paragraph in the text version of the mailing.
Menu item 1-10	
Text	Enter the caption of the menu item. To use an image for the menu item instead of a caption, enter a caption anyway. In this case, the caption is used as the image's alternative text. **Tip:** You can display an image with or without a caption for the menu item. These settings are in the **Options** tab under **Menu items** > **Image position**.
URL	Enter a URL to which the menu item should refer. If a recipient clicks this menu item, he/she is directed to the specified URL.

<table>
<tr><th>Parameter</th><th>Description</th></tr>
<tr><td>Text color</td><td>Specify the text color for the menu item caption. If you leave the field blank, the text color specified in general settings > Menu items in the navigation menu > Font settings > Color is used.</td></tr>
<tr><td>Background color</td><td>Specify a background color for . The setting only affects the selected menu item.

To use the same color for all menu items, configure a global background color. These settings are in the Options tab > Menu items > Background color.</td></tr>
<tr><td>Image</td><td>Upload an image. Click Browse... and select an image in the file browser. Alternatively, in the Alternatively external URL field, you can enter an image URL that refers to the image source.

Tip: You can display the image together with or without the caption of the menu item. The corresponding settings are in the Options tab under Menu items > Image position.

Note: The image size of the uploaded image is not reduced. So, only upload images that match the size of the menu item.

If you select a multi-column layout for the mobile version, before sending, use mobile preview to check if the navigation menu displays correctly with these settings.</td></tr>
<tr><td>Show in mobile version</td><td>Select to show the menu item in the mobile version of the mailing.</td></tr>
</table>

Separator lines

Parameter	Description
Content	
Show vertical separator lines in the desktop version	Select to insert vertical separator lines between menu items in the desktop version.
Show vertical separator lines in the mobile version	Select to insert vertical separator lines between menu items in the mobile version.
Show horizontal separator lines in the mobile version	Check this box to show horizontal separator lines between menu items in the mobile version. This option only takes effect if you are using the default layout and configure it so that menu items in the mobile version are displayed below each other (see the **Options** tab under **Layout** > **Default layout**).
Layout	
Thickness	Enter the thickness of separator lines between menu items in pixels (integer value) .If you leave the field blank, the lines are displayed with a 1 pixel thickness. To show no separator lines, enter 0.
Color	Enter the color of the separator lines. If you leave the field blank, the color you specified in the general settings in the **Font settings** tab under **Menu items in the navigation menu** > **Color** is used.

Hamburger menu

To save space for display on smart phones and tablets, you can use a hamburger menu to reduce the navigation menu to an icon.Recipients can expand and collapse the navigation menu by clicking the icon.

> **Note:** The hamburger menu is only available for the mobile version. In addition, Google's Gmail app does not support this feature and shows menu items expanded.

Parameter	Description
General	
Display	Select to activate the hamburger menu in the mobile version of your mailing.
Menu bar	
Heading	Enter the caption of the hamburger menu. The caption displays next to the hamburger menu icon.
Padding	Configure the size of the menu bar by specifying the area around the hamburger menu symbol. Enter the value in pixels (integer values).
Background color	Enter the background color for the hamburger menu's menu bar.
Image	
Image	Upload an image to replace the menu bar label with an image. Click **Browse…** and select an image in the file browser. Alternatively, in the **Alternatively external URL** box, enter an image URL that refers to the image source. If the uploaded image is too wide for the menu bar, the image is adjusted to the maximum available width.
Alternative text	Enter an alternative text that displays if a recipient blocks the download of images, or the image cannot be displayed for any other reason. The alternative text should contains a brief description of the picture.
Link	Enter the URL of a landing page, beginning with the `http://` or `https://` protocol. If you already created a landing page for the mailing, a list of those landing pages appears.

Parameter	Description
Icon	
Position	Select the position of the hamburger menu icon.
Color	Enter the color for the hamburger menu icon. If you leave the field blank, the color specified in the general settings in the **Font settings** tab under **Menu items in the navigation menu** > **Color** is used.
Background color	Enter the background color of the hamburger menu icon.
Rounding contours	Check this box to round the contours of the hamburger menu icon.

Options

Parameter	Description
Layout	
Width	Enter at least 30 pixel width. The setting only affects the desktop version. If you leave the field blank, the paragraph is displayed across the entire width available in the mailing. If you want to change the available width in the mailing, open the general settings, open the **General** tab and make your changes in the **Layout** area.
Height	Enter the height of the paragraph in pixels. The setting only affects the desktop version. If you leave the field blank, the height will automatically be adjusted to fit the content of the paragraph. **Note:** If you select a height that is insufficient for the content of the paragraph, the value you enter is ignored, and the height is adjusted automatically.
Alignment	Specify how to position the navigation menu.

Parameter	Description
Background color	Enter the background color of the navigation menu.
Padding	Specify white space around the paragraph content. You can set white space separately for each page. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides are uniform with 10 pixels of white space for the content • 10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right • 10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels on the left If the value is set to 0, then there will be no padding.
Layout	Select a layout for your navigation menu. You can select between the supplied default layout and up to five custom user-defined layouts. To use a user-defined layout, set it up in advance in the general settings in the **Navigation menu** tab. If you choose to enter a user-defined layout from the drop-down list that you have not configured, the default layout is used instead. See Navigation menu layouts.
Default layout	Select the arrangement of menu items for the mobile version of the default layout. **Note:** If you use a custom layout, the option selected here is ignored.
Background image	
Image	To upload a background image that covers menu items, click **Browse...** and select an image in the file browser. In the **Alternatively external URL** box, you can also enter an image URL that refers to the image source. **Note:** If you specify a background image, it is used instead of the selected background colors for menu

Parameter	Description
	items. **Note:** Not all email programs and web mailers support background images. You should only upload back-ground images that contain unimportant information.
Alignment	Specify how to position the background image.
Repeat	Specify whether and how the background image is repeated.
Menu items...	
Background color	Specify a global background color for the menu items. **Note:** If you specify an individual background color for a menu item, this is used instead of the global back-ground color. To use the global background color for a menu item, delete the color value in the **General** tab under **Menu item #** > **Background color**.
Width (desktop version)	Enter the width of the menu items in pixels. **Tip:** The recommended width for the menu items is shown in the preview on the left if you hover over **?Help**.
Padding	Configure the size of the menu items by specifying the area around the caption. You can set each side of the area individually. Enter the values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 10 = sides of the area a uniform distance of 10 pixels away from the label

<table>
<tr><th>Parameter</th><th>Description</th></tr>
<tr><td></td><td>10 20 = 10 pixels on the top and bottom, 20 pixels on the left and right
10 15 20 25 = 10 pixels on the top, 15 pixels on the right, 20 pixels on the bottom, 25 pixels to the left</td></tr>
<tr><td>Text alignment</td><td>Specify how to position the captions of the menu items.</td></tr>
<tr><td>Text position (next to the image)</td><td>Specify where to position captions of menu items next to an image.

Note: This option applies in the following cases:
If an image is used in the menu item, and the caption is activated.
If the caption of a menu item wraps to several lines; the caption of the other menu items is positioned according to the option selected here.
You can set images for each menu item in the General tab under Menu item # > Image.
Activate the caption with the following Image position option.</td></tr>
<tr><td>Image position</td><td>Specify whether and where the images next to the captions of the menu items are displayed.

Tip: If you select Centered (no label), the stored caption is not displayed but is used for the image's alternative text.</td></tr>
<tr><td colspan="2">Menu items (mobile version)</td></tr>
<tr><td>Width</td><td>Enter the width of the menu items in percent.

Tip: This option only takes effect if you use the default layout, and it is set so that individual menu items in</td></tr>
</table>

© Optimizely 2022

Parameter	Description
	the mobile version are displayed next to each another (see the **Options** tab under **Layout** > **Default layout**).
Text alignment	Specify how to position the captions of the menu items.
Text position (next to the image)	Specify how to position the captions of the menu items next to the image. **Note:** This option applies in the following cases: • If an image is used in the menu item and the caption is activated • If the caption of a menu item wraps to several lines; the caption of the other menu items is positioned according to the option selected here • You can set images for each menu item in the **General** tab under **Menu item #** > **Image**. • Activate the caption in the **Options** tab under **Menu items (desktop version)** > **Image position**.
Border	
Show	Select to add a border to the paragraph. Do not forget to specify a color for the border when you activate the option.
Border width	Enter the thickness of the border. You can set thickness for each side individually. Enter values in pixels (integer values) based on the following example, using spaces to separate multiple pixel entries: • 1 = sides uniform with 1 pixel • 1 2 = 1 pixel on the top and bottom, 2 pixels on the left and right • 1 2 3 4 = 1 pixel on the top, 2 pixels on the right, 3 pixel on the bottom, 4 pixel on the left.

Parameter	Description
	If you leave the field blank, the border has a thickness of 1 pixel (uniform on all sides).
Color	The depiction of non-hex web colors may vary from the original, depending on the browser.
Mobile...	
Width	Set the paragraph width (in percent; 100% default) for mobile view. To display paragraphs next to each another in mobile view, make sure that the widths of two consecutive paragraphs combine to 100%. Otherwise, the paragraphs are displayed on top of each another with the assigned widths.

Click profiles tab

Parameter	Description
Click profiles	Clicks on any link in this paragraph are allocated to the selected click profiles. See Click profiles.

Target groups tab

Parameter	Description
Target groups	To show this paragraph to one or more target groups only, select them. If more than one target group is selected, just one must match (OR logic). See Target groups.

> **Note:** If more than one target group is selected for a paragraph, it is displayed if only one of them matches. Be aware also that paragraphs that do not occupy the whole width of the newsletter (for example, a sidebar) may cause unwanted gaps in the newsletter. Test the newsletter with target groups using the **Target groups** button in the top

> menu of this window and the **Send test email to target group** function.

Adjusting font settings

To change general font settings (for example, font, font color, font size and so on), adjust the options in the general settings in the **Navigation menu** tab under **Menu items in the navigation menu**.

Navigation menu layouts

This topic describes:

- how customer support sets up alternative HTML layouts
- how to select alternative layouts in the navigation menu
- how to edit alternative layouts using in-depth knowledge of HTML, CSS, and Velocity

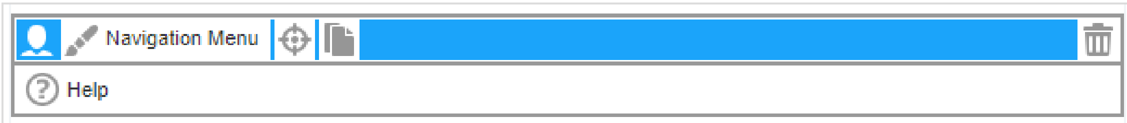
To receive up to five alternative layouts, contact customer support to set up alternative layouts.

To create HTML layouts, set up alternative layouts for mobile and text versions also. If no alternative layouts are saved for those versions, the default layout is used.

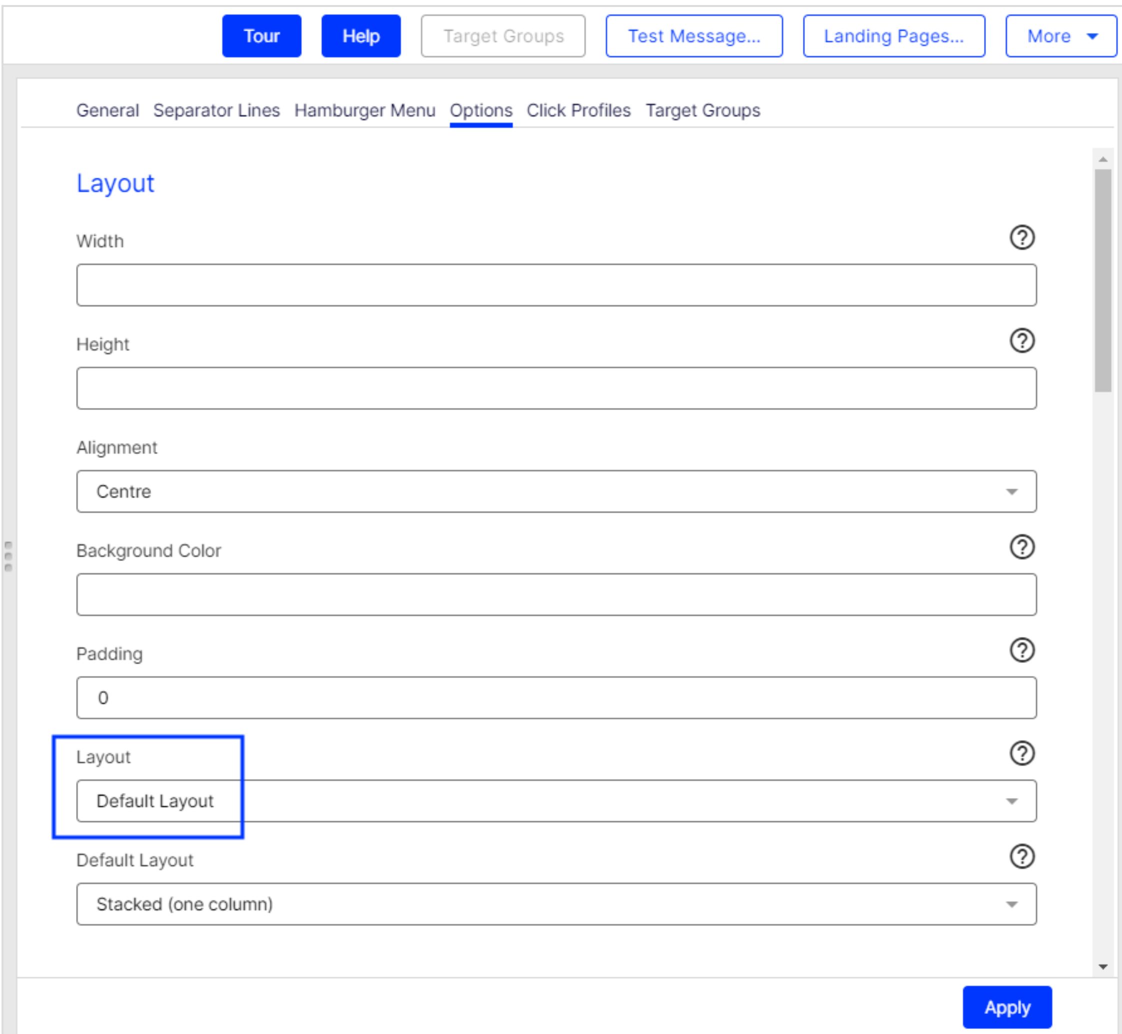
> **Note:** In some cases, some text elements will not be in the order that you want.

Selecting a layout

1. To select a default layout or up to five alternative layouts, while editing a message in the Template Kit, on the left side of the preview, in the menu bar of the navigation menu, click **Navigation Menu**.



2. Open the **Options** tab.
3. In the **Layout** area, in the **Layout** drop-down list, select the layout you want to use.



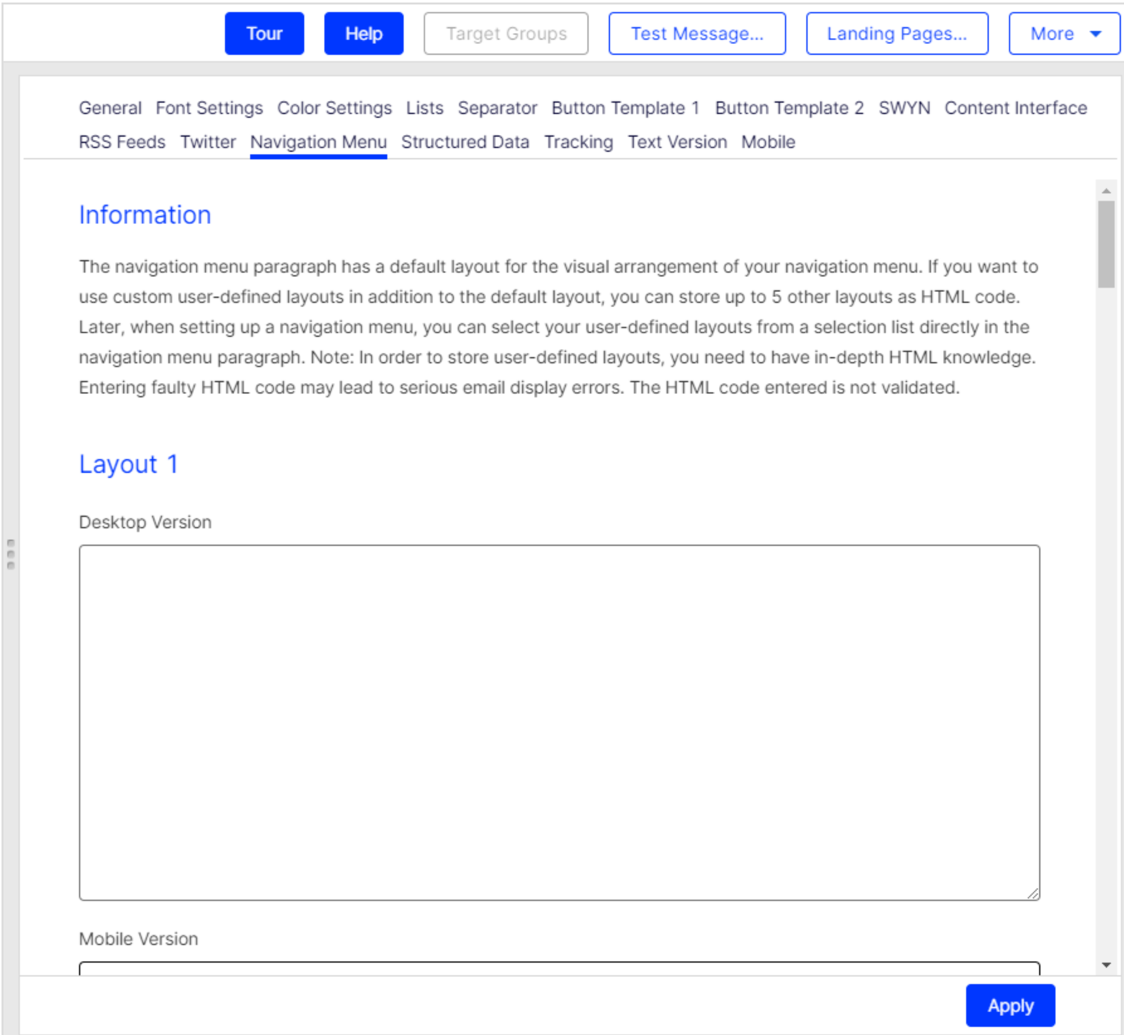
4. Click **Apply**.

Editing a layout

You can edit alternative layouts but not the default layout.

> **Warning:** If you lack knowledge of HTML, CSS, and Velocity, contact customer support to edit the alternative layouts. If you edit them without in-depth knowledge, serious display errors may occur in your mailings.

1. In the preview on the left, click **Settings**.
2. Open the **Navigation menu** tab. Each layout has source text fields for the desktop, mobile, and text versions.



3. Edit the source text of the corresponding layout as needed. See Insert content to learn how to retrieve and place the various content items.

> **Note:** Set up alternative layouts for mobile and text versions also. If no alternative layouts are created for these versions, the default layout is used.

4. Click **Apply**.

Inserting content

Access the content of the navigation menu using Velocity variables and format the transferred content using HTML style attributes.

The following Velocity variables are available:

- **Status**. Information on current item paragraphs
- **Present**. For using queries that check for the presence of an element
- **Value**. For issuing the content

Notes for the creation of new layouts

- **Font definitions**. If you are using an alternative layout variant, font definitions must exist in the HTML you entered. The texts are not formatted by the Template Kit to give you complete freedom in visual design.
- **Widths**. Specify a fixed width or a width in percent. You should enter a percentage, because this prevents elements from sticking out of the layout.
- **Danger of display errors**. If you edit the layouts without in-depth knowledge of HTML, serious display errors may occur in your mailings.

Status variables

Variable	Type	Description
$separatorDesktopEnabled	Boolean	Contains `true` if the **Show vertical separator lines in desktop version** check box in the **Content** section of the **Separator lines** tab is selected, otherwise `false`.
$separatorDisplayVerticalInMobileVersion	Boolean	Contains `true` if the **Show vertical separator lines in mobile version** check box in the **Content** section of the **Separator lines** tab is selected , otherwise `false`.

Variable	Type	Description
$separatorDisplayHorizontalInMobileVersion	Boolean	Contains `true` if the **Show horizontal separator lines in mobile version** check box in the **Content** section of the **Separator lines** tab is selected , otherwise `false`.
$hamburgerMenuEnabled	Boolean	Contains `true` if the **Show** check box in the **General** section of the **Hamburger menu** tab is selected, otherwise `false`.
$hamburgerMenuIconRounded	Boolean	Contains `true` if the **Rounding contours** check box in the **Icon** section of the **Hamburger menu** tab is selected, otherwise `false`.
$navigationItemsAmountValue	Integer	Contains the number of menu items that are displayed. Menu items are only displayed if a link and either the text or the image are specified.
$navCurrentParagraphId	Integer	Contains the ID of the respective navigation menu paragraph. This ID is particularly important for the mobile version, because the CSS classes use this ID as a suffix in the name.

Present Variables

Variable	Type	Description
$item1TextPresent – $item10TextPresent	Boolean	Contains `true` if there

Variable	Type	Description
		is content for the **Text** box in the **Menu item #** area, otherwise `false`.
$item1LinkUrlPresent – $item10LinkUrlPresent	Boolean	Contains `true` if there is content for the **URL** box in the **Menu item #** area, otherwise `false`.
$item1ImageUrlPresent – $item10ImageUrlPresent	Boolean	Contains `true` if there is content for the **Image** box in the **Menu item #** area, otherwise `false`.
$item1ColorPresent – $item10ColorPresent	Boolean	Contains `true` if there is content for the **Text color** box in the **Menu item #** area, otherwise `false`.
$item1BackgroundColorPresent – $item1Back-groundColorPresen	Boolean	Contains `true` if there is content for the **Back-ground color** box in the **Menu item #** area, otherwise `false`.
$navigationLinkColorPresent	Boolean	Contains `true` if there is content for the **Color** box in the general set-tings under **Font set-tings** > **Menu items in the navigation menu**, otherwise `false`.
$separatorLayoutThicknessPresent	Boolean	Contains `true` if there is content for the **Thick-**

Variable	Type	Description
		ness box under **Separator lines** > **Layout**, otherwise `false`.
$separatorLayoutColorPresent	Boolean	Contains `true` if there is content for the **Color** box under **Separator lines** > **Layout**, otherwise `false`.
$hamburgerMenuMenuBarHeadlinePresent	Boolean	Contains `true` if there is content for the **Heading** box under **Hamburger menu** > **Menu bar**, otherwise `false`.
$hamburgerMenuMenuBarPaddingPresent	Boolean	Contains `true` if there is content for the **Padding** box under **Hamburger menu** > **Menu bar**, otherwise `false`.
$hamburgerMenuMenuBarBackgroundColorPresent	Boolean	Contains `true` if there is content for the **Background color** box under **Hamburger menu** > **Menu bar**, otherwise `false`.
$hamburgerMenuMenuBarImagePresent	Boolean	Contains `true` if there is content for the **Image** box under **Hamburger menu** > **Image**, otherwise `false`.
$hamburgerMenuMenuBarImageAltTextPresent	Boolean	Contains `true` if there is content for the **Alternative text** box under **Hamburger**

© Optimizely 2022

Variable	Type	Description
		menu > **Image**, otherwise `false`.
$hamburgerMenuMenuBarImageLinkPresent	Boolean	Contains `true` if there is content for the **Link** box under **Hamburger menu** > **Image**, otherwise `false`.
$hamburgerMenuIconColorPresent	Boolean	Contains `true` if there is content for the **Color** box under **Hamburger menu** > **Icon**, otherwise `false`.
$hamburgerMenuIconBackgroundColorPresent	Boolean	Contains `true` if there is content for the **Background color** box under **Hamburger menu** > **Icon**, otherwise `false`.
$navigationBackgroundImageUrlPresent	Boolean	Contains `true` if there is content for the **URL** box under **Options** > **Background image**, otherwise `false`.
$navigationItemDesktopBackgroundColorPresent	Boolean	Contains `true` if there is content for the **Background color** box under **Options** > **Menu items**, otherwise `false`.
$navigationItemDesktopWidthPresent	Boolean	Contains `true` if there is content for the **Background color** box under **Options** > **Menu items**, otherwise `false`.

Variable	Type	Description
$navigationItemDesktopPaddingPresent	Boolean	Contains `true` if there is content for the **Padding** box under **Options** > **Menu items**, otherwise `false`.
$navigationItemMobileWidthPresent	Boolean	Contains `true` if there is content for the **Width** box under **Options** > **Menu items (mobile version)**, otherwise `false`.
$item1DisplayInMobileVersion – $item10DisplayInMobileVersion	Boolean	Contains `true` if the **Show in mobile version** check box under **General** > **Menu item #** is selected, otherwise `false`.

Value-Variables

Variable	Type	Environment	Description
$item1TextValue – $item10TextValue	String	Desktop, Mobile, Text	Contains the unformatted content of the **Text** box from the **Menu item #** area.
$item1TextFormattedValue – $item10TextFormattedValue	String	Desktop, Mobile	Contains the formatted content of the **Text** box from the **Menu item #** area.

© Optimizely 2022

Variable	Type	Environment	Description
			The text is formatted using the font settings from the general settings and the text color from the menu item itself.
$item1LinkUrlValue – $item10LinkUrlValue	String	Desktop, Mobile, Text	Contains the unformatted content of the **URL** box from the **Menu item #** area.
$item1LinkFormattedValue – $item10LinkFormattedValue	String	Desktop, Mobile	Contains the formatted content of the **URL** box from the **Menu item #** area. The text is formatted using the font settings from the general settings and the text color from the menu item itself. **Note:** If you have uploaded an image for the

Variable	Type	Environment	Description
			menu item and positioned it to the right or left of the text, the link is displayed including text and image.
$item1ImageUrlValue – $item10ImageUrlValue	String	Desktop, Mobile, Text	Contains the content of the **Image** box from the **Menu item #** area.
$item1ColorValue – $item10ColorValue	String	Desktop, Mobile	Contains the content of the **Text color** box from the **Menu item #** area.
$item1BackgroundColorValue – $item10BackgroundColorValue	String	Desktop, Mobile	Contains the content of the **Background color** box from the **Menu item #** area.
$navigationLinkColorValue	String	Desktop, Mobile	Contains the content of the **Color** box from the general settings > **Font settings** tab > **Menu Items in the**

Variable	Type	Environment	Description
			Navigation Menu area.
$separatorLayoutThicknessValue	String	Desktop, Mobile	Contains the content of the **Thickness** box from the **Separator lines** tab > **Layout** area.
$separatorLayoutColorValue	String	Desktop, Mobile	Contains the content of the **Color** box from the **Separator lines** tab > **Layout** area.
$hamburgerMenuMenuBarHeadlineValue	String	Mobile	Contains the unformatted content of the **Heading** box from the **Hamburger menu** tab > **Menu bar** area.
$hamburgerMenuMenuBarHeadlineFormattedValue	String	Mobile	Contains the formatted content of the **Heading** box from the **Hamburger menu** tab > **Menu bar** area.
$hamburgerMenuMenuBarPaddingValue	String	Mobile	Contains the content of the

Variable	Type	Environment	Description
			Padding box from the **Hamburger menu** tab > **Menu bar** area.
$hamburgerMenuMenuBarBackgroundColorValue	String	Mobile	Contains the content of the **Background color** box from the **Hamburger menu** tab > **Menu bar** area.
$hamburgerMenuIconPositionValue	String	Mobile	Contains the content of the **Position** box from the **Hamburger menu** tab > **Icon** area.
$hamburgerMenuIconColorValue	String	Mobile	Contains the content of the **Color** box from the **Hamburger menu** tab > **Icon** area.
$hamburgerMenuIconBackgroundColorValue	String	Mobile	Contains the content of the **Background color** box from the **Hamburger menu** tab > **Icon** area.

Variable	Type	Environment	Description
$hamburgerMenuMenuBarImageUrlValue	String	Mobile	Contains the content of the **Image** box from the **Hamburger menu** tab > **Image** area.
$hamburgerMenuMenuBarImageAltTextValue	String	Mobile	Contains the content of the **Alternative text** box from the **Hamburger menu** tab > **Image** area.
$hamburgerMenuMenuBarImageLinkValue	String	Mobile	Contains the content of the **Link** box from the **Hamburger menu** tab > **Image** area.
$navigationAlignmentValue	String	Desktop, Mobile	Contains the content of the **Alignment** box from the **Options** tab > **Layout** area.
$navigationBackgroundImageUrlValue	String	Desktop, Mobile	Contains the content of the **Image** box from the **Options** tab > **Background image** area.

Variable	Type	Environment	Description
$navigationBackgroundImageAlignmentValue	String	Desktop, Mobile	Contains the content of the **Alignment** box from the **Options** tab > **Background image** area.
$navigationBackgroundImageRepeatValue	String	Desktop, Mobile	Contains the content of the **Repeat** box from the **Options** tab > **Background image** area.
$navigationItemDesktopBackgroundColorValue	String	Desktop, Mobile	Contains the content of the **Background color** box from the **Options** tab > **Menu items** area.
$navigationItemDesktopWidthValue	String	Desktop, Mobile	Contains the content of the **Width (desktop version)** box from the **Options** tab > **Menu items** area.
$navigationItemDesktopPaddingValue	String	Desktop, Mobile	Contains the content of the **Padding** box from the **Options** tab > **Menu items**

Variable	Type	Environment	Description
			area.
$navigationItemDesktopAlignmentValue	String	Desktop, Mobile	Contains the content of the **Text alignment** box from the **Options** tab > **Menu items** area.
$navigationItemDesktopVerticalAlignmentValue	String	Desktop, Mobile	Contains the content of the **Text position (next to the image)** box from the **Options** tab > **Menu items** area.
$navigationItemImageBehaviorValue	String	Desktop, Mobile	Contains the content of the **Image position** box from the **Options** tab > **Menu items** area.
$navigationItemMobileWidthValue	String	Mobile	Contains the content of the **Width** box from the **Options** tab > **Menu items (mobile version)** area.
$navigationItemMobileAlignmentValue	String	Mobile	Contains the

Variable	Type	Environment	Description
			content of the **Text alignment** box from the **Options** tab > **Menu items (mobile version)** area.
$navigationItemMobileVerticalAlignmentValue	String	Mobile	Contains the content of the **Text position (next to the image)** box from the **Options** tab > **Menu items (mobile version)** area.

Field functions

This topic describes how to work with field functions to personalize or adjust mailing content. Optimizely Campaign uses the template engines Dynamic rendering (ODR) and Velocity that lets you create your own field functions.

ODR is an XML-based script language for field functions; Velocity is a Java-based language. You should have some knowledge of HTML/XML or Java because this documentation provides only the basics of using Dynamic Rendering or Velocity. For the most common use cases you can also use the Optimizely Campaign field function templates.

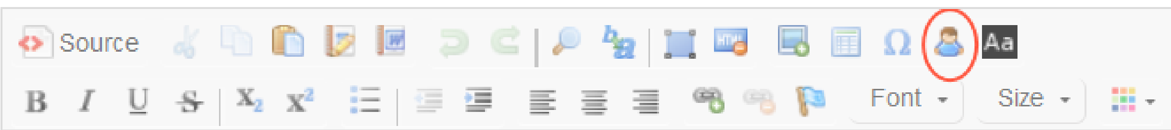
> **Note: Dynamic Rendering and Velocity classes and operations**
>
> The special feature, **Edit Field Functions**, provides a wide range of personalization options for your mailings. However, only classes, operations, and parameters documented in this manual are permitted for

the creation of field functions. Velocity or Dynamic Rendering code not documented here may interfere with or damage your mailing templates and affect the sending of mailings.

Read this documentation *thoroughly*.

Always test user-defined field functions with the personalized preview. If you have any questions or doubts about the code and its correct utilization, contact customer support.

Adding field functions to mailings



In the context of a mailing (paragraph, subject, and so on), you insert field functions using a placeholder in curly brackets **{ }**. To add a field function to a paragraph, follow these steps when editing a mailing.

1. In the editor toolbar, click **Insert Field Function** .
2. In the dialog box, select the desired field.
3. Click **OK**.

Tip: If you know the name of a field function, insert the name between curly brackets wherever you want it to appear in a mailing. When the mailing is sent, the field function placeholder is replaced by the content for which the field function stands.

Field function use cases

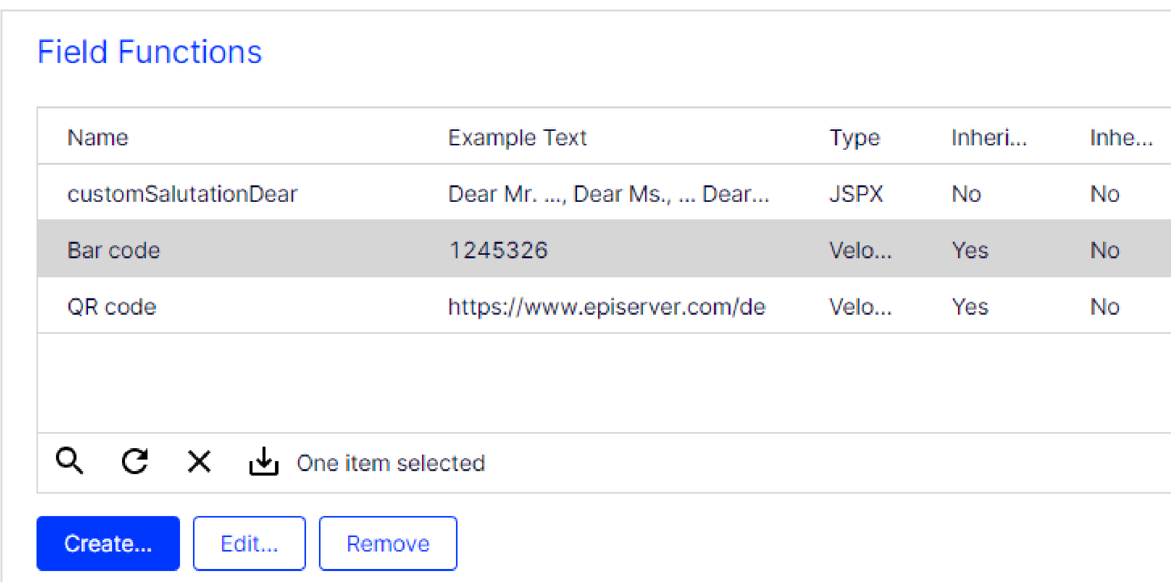
Field functions replace or personalize content. The field function definition generates a string (some text) and inserts it in the mailing. Some field functions are a simple replacement, for example they set the name or a date. Others can distinguish among different cases and replace the content accordingly. Also, field functions can be defined through target groups. These only generate text if the recipient matches the target group. The following list gives examples of field functions:

- **Date**. The current date is inserted.
- **Salutation**. A salutation usually contains one for males, another for females, and neutral term for recipients whose name and gender are unknown.
- **Subject line**. For example, the name or other personalization strings.

> **Tip: Personalized links**
>
> You can use field functions to create personalized links in your mailings. You also can use field function placeholders in the domain part or path of a URL and in URL parameters. The link tracking of personalized links works as in regular links.

Editing field functions

To edit a field function, select **Administration** > **Field Functions**. The overview shows editable field functions. If you are working in a sub-client, the list also shows field functions inherited from the main client but these cannot be edited. Select a field function from the list and click **Edit...**.



To create a new field function, click **Create...**. If you remove a field function, make sure it is not used in an active mailing.

- **Inheritable**. Select if you want to make the field function available in sub-clients. Users logged into a sub-client can use inherited functions, but not edit them.
- **Type**. Select which rules are applied for validation and execution of a field function:

  > **Note:** Do not change the type if you are not sure of what you are doing.

  - **JSPX**. This type accepts only valid XML code.
  - **Velocity**. This type accepts only Velocity code.
- **Example**. Shows a replacement example. Enter an actual example or a description of the field function that explains the field function.
- **Content**. Enter the field function definition using either Dynamic Rendering or Velocity for each mailing type, media type (marketing channel) or content type. This may be static text, dynamic text or both. To create dynamic content, enter commands and queries that are executed when the mailing is sent.
  - **Default Replacement**. Contains a fallback that is applied if a field function is not defined. Also, if you do not want to specify different field functions for each email type, media type, and element type, use this field and leave the others empty.
  - **Text**. Write the code and text for the field function used in the text version of a mailing.
  - **HTML**. Write the code and text of a field function used in the HTML version of a mailing.
  - **SMS**. Write the code and text of a field function used in SMS mailings.
  - **Subject**. Write the code and text of a field function used in the subject line of a mailing.

Template engines

Template engines are software tools to process a field function. That is, they read the commands in a field function, query the database, and create an output string. Optimizely Campaign provides two template engines: the proprietary Dynamic Rendering engine, and the

© Optimizely 2022

Velocity engine. The following paragraph introduces these two and lists available classes and functions.

ODR – Dynamic Rendering

If your are familiar with XML and HTML tags, you can learn how to write field functions in the Dynamic Rendering language. The following example shows a salutation logic written in Dynamic Rendering.

Sample code

```
<odr:choose>
       <odr:when test="%{not empty user.data.firstname and not empty user.data.lastname
and user.data.salutation == 'Mrs.'}">
               <odr:out value="Dear Mrs. %{user.data.firstname} %{user.data.lastname}," />
       </odr:when>
       <odr:when test="%{not empty user.data.firstname and not empty user.data.lastname
and user.data.salutation == 'Mr.'}">
               <odr:out value="Dear Mr. %{user.data.firstname} %{user.data.lastname}," />
       </odr:when>
       <odr:otherwise>
               <odr:out value="Dear Sir or Madam," />
       </odr:otherwise>
</odr:choose>
```

Tip: Remarks

- **Line 1**. The **choose** tag initiates a query of several parameters. It contains no attributes.
- **Lines 2 and 7**. The **when** tag initiates the query of a single parameter. Attributes are the parameter itself and the values. In the example, the tag checks whether the fields first and last name in the recipient list are not empty and whether the field **Salutation** contains *Mrs.* or *Mr.*.
- **Lines 4 and 8**. The **out** tag contains the output string. This is static or dynamic text or both, like in the example.
- **Line 12**. The **otherwise** tag defines the output string for cases that do not match a previous tag. It contains no attributes

© Optimizely 2022

Line breaks, blank spaces and formatting with Dynamic Rendering

Line breaks and blank spaces between Dynamic Rendering tags are escaped during the rendering. You can insert blank spaces in the running text inside the quotation marks. HTML tags inside the Dynamic Rendering expressions (that is, inside the quotation marks) must be written as entities. Use the following entities to escape the respective characters:

- <. (< less than)
- > (> greater than)
- " (" quotation mark)
- & (& ampersand)

Velocity

Velocity is a Java-based template engine. Velocity algorithms can appear within HTML in a mailing or a website. An algorithm may contain conditions and fallbacks, which generate some text if true and another text or no text if false.

Velocity references are initiated with a **$** sign, followed by a class and a function. Two examples are below.

Example: Insert first and last name of a recipient in a salutation

```
Dear ${user.data.firstname} ${user.data.lastname}!
```

You also can use the expression `${user.data.[field_name]}` to address any field in the recipient list by replacing `[field_name]` with the field name.

If your recipient list contains recipients whose first name is unknown, because it is usually not a mandatory field, the expression shown above needs to be extended. Otherwise, it could produce a salutation like "Dear Smith!". With Velocity, you can define an alternative expression, using "Dear Mrs." or "Dear Mr." plus the recipient's last name.

Example: Salutation with complete name and fallback

To consider possible cases, write an if-then algorithm. This algorithm is initiated with a pound sign (**#**) and the command **if**. Below, the different cases and an alternative (else) are formulated. The algorithm ends with `#end`:

```
#if("$!{user.data.lastname}" != "" &&"$!{user.data.gender}" != "")Dear
#if($user.data.gender.startsWith("male"))Mr.
#if($user.data.gender.startsWith("female"))Mrs.#end $user.data.lastname
#else$!{null}Dear Sir or Madam#end$!{null}
```

Tip: Remarks

- **Line 1**. To formulate the salutation, the recipient's last name and gender must be known. In this line, the field function checks whether both exist for a given recipient. (If lastname is not null AND gender is not null…)

  If you formulate an `#if` operation, use the special operator `$!`. Otherwise, if the variable is not defined, Velocity would read the variable's name as a string (and not its value, because there is none) and, when an expression "does equal" is formulated, the result would be `false`, because the string is unequal to a non existing value. The special operator `$!` suppresses this expression if the variable it is not defined.

  The whole expression is wrapped in quotation marks. If a field is not defined for a recipient, a query would deliver the result NULL. The quotation marks transform this into an empty string, which can be validated with conditions of the type =`""` (is empty) or `!=""` (is not empty).

- **Line 2**. If the gender is male, the correct form "Mr." is chosen.
- **Line 3**. If the gender is female, the form "Mrs." is chosen, followed by the recipient's last name.
- **Line 4**. The placeholder `#else` creates a fallback, which is used if the first condition does not match, that is if either the last name or the gender are not known. In this case, a neutral, general salutation is displayed.

  If Velocity commands are inserted directly into continuous text, space characters after such commands are ignored. This may cause text that follows a

> Velocity command to be interpreted together with the command. The result is a syntax error. To avoid such errors, a NULL object must be inserted between the Velocity command and the text: `$!{null}`. This object does not generate any output but closes the preceding command.
>
> Close Velocity-Code with the Tag `#end`. After this tag, insert a line break.

Velocity classes and functions

Optimizely Campaign provides several classes and functions that you can use to define field functions.

- $user.data
- $bmFormat
- $bmMimeType
- $filter

$user.data

Query fields of a recipient list. Use this function either to insert the value of a field (such as a user's name) in a mailing (placeholder), or to check if the field matches a given value (if-then-function).

Function	Velocity code
Value equals a string value	`$user.data.[field_name] == "string"`
Value equals a numeric value	`$user.data.[field_name] == X`
Value does not equal a string value	`$user.data.[field_name] != "string"`
Value starts with a string value	`$user.data.[field_name].startsWith ("string")`
Value does not equal a numeric	`$user.data.[field_name] != X`

Function	Velocity code
value	
Value is less than or equals a numeric value	`$user.data.[field_name] <= X`
Value is greater than or equals a numeric value	`$user.data.[field_name] >= X`
Value is greater than a numeric value	`$user.data.[field_name] > X`
Special function: IsOnlineVersion	`$user.data.bmIsOnlineVersion`

Use **IsOnlineVersion** to check whether the online version of a newsletter is currently displayed. The return value is `true`. To hide the link to the online version, if it is already displayed, specify the following Velocity code:

```
#if($user.data.bmIsOnlineVersion)cLICK <a href="{Online-Version-Link}"
target="_blank">here</a> to read an online version of this newsletter.
```

$bmFormat

Format a value within this expression. You can only format dates and numeric values, but you can add an optional pattern or the number of decimal places (precision). The following code show an example of using **$bmFormat**:

```
You registered with us on $bmFormat.formatDate($user.data.created)
```

Function	Velocity code
Format as percentage	`$bmFormat.formatPercentage`
Format as currency. If the parameter **includeCurrencySymbol** is set to `true`, the currency symbol is displayed.	`$bmFormat.formatCurrency`

© Optimizely 2022

Function	Velocity code
Format a date	`$bmFormat.formatDate`
Format a date and time	`$bmFormat.formatDateTime`
Format a time	`$bmFormat.formatTime`

Attributes for formatting numeric values

Attribute	Description
pattern	• **Numeric values**. Use the pattern **###,###,###.##** or **000000.000**. # stands for a digit, 0 for leading or trailing zeros. The dot indicates a decimal separator and can only appear once in the pattern. The comma is used is used as a grouping symbol and can appear any number of times, except after the decimal point where it may not appear. **Note:** The output that this creates has numeric values appear with German formatting; that is, the grouping symbol (comma in the pattern) is displayed as a dot and the decimal separator (dot in the pattern) is displayed as a comma—for example "1.000,00". English formatting (for example "1,000.00") is not supported. Examples for the value 1000:

Attribute	Description
	• **Date values**. Use the pattern `dd.MM.yyyy`. • **Time values**. Use the pattern `hh:mm:ss`. For more information about formatting numbers and dates, see the Java documentation from Oracle.
precision	Integer value that specifies the number of decimal places to which the output value should be rounded.

$bmMimeType

Query the mime type of the mailing that is currently rendered.

Mime Type	Velocity code
Plain text emails	`$bmMimeType == "text/plain"`
HTML emails	`$bmMimeType == "text/html"`

$filter

Invoke a target group. The submitted string must match a target group ID of your Optimizely Campaign client. To get the IDs of your target groups, contact customer support. Do not use an ID if you are not sure it matches a target group; otherwise, your template does not work properly. The Velocity code for this function is as follows:

```
$filter.filterByRevisionedFilter
```

Field function templates

The following topics provide you with Velocity and ODR templates that let you create your own field functions:

Personalized salutations

This topic describes ODR and Velocity salutation logics. By default, Optimizely Campaign uses ODR salutation logic.

> **Note:** Use your specific data and recipient list fields, and test the field functions before using them in a mailing.

ODR

Below you can find standard and special ODR salutation logics including field function templates.

> **Note:** ODR cannot display special characters as HTML codes. Since some email programs require the respective HTML codes to display special characters correctly, you must use Velocity for these cases.

Salutations without title

You can use the following ODR code for the personalized salutation *Dear Mrs.*, *Dear Mr.* or *Dear Sir or Madam*:

```
<odr:set value="%{lower(user.data.salutation)}" var="salut"/>
<odr:set value="%{user.data.lastname}" var="lname"/>
<odr:choose>
  <odr:when test="%{not isEmpty(lname) and (salut eq 'mr' or salut eq 'mrs')}">
    <odr:choose>
      <odr:when test="%{salut eq 'mr'}">
```

```
        <odr:out value="Dear Mr." />
      </odr:when>
      <odr:when test="%{salut eq 'mrs'}">
        <odr:out value="Dear Mrs." />
      </odr:when>
    </odr:choose>
    <odr:out value=" %{lname}" />
  </odr:when>
  <odr:otherwise>
    <odr:out value="Dear Sir or Madam" />
  </odr:otherwise>
</odr:choose>
```

Salutations with title

If your recipient list contains a recipient list field for the salutation title, you can display it with the following ODR code:

```
<odr:set value="%{lower(user.data.salutation)}" var="salut"/>
<odr:set value="%{user.data.title}" var="title"/>
<odr:set value="%{user.data.lastname}" var="lname"/>
<odr:choose>
  <odr:when test="%{not isEmpty(lname) and (salut eq 'mr' or salut eq 'mrs')}">
    <odr:choose>
      <odr:when test="%{salut eq 'mr'}">
        <odr:out value="Dear" />
      </odr:when>
      <odr:when test="%{salut eq 'mrs'}">
        <odr:out value="Dear" />
      </odr:when>
    </odr:choose>
    <odr:choose>
         <odr:when test="%{not isEmpty(title)}">
           <odr:out value=" %{title}" />
      </odr:when>
    </odr:choose>
    <odr:out value=" %{lname}" />
  </odr:when>
  <odr:otherwise>
    <odr:out value="Dear Sir or Madam" />
  </odr:otherwise>
</odr:choose>
```

Mixed salutations

If you have different entries in the recipient list field for the salutation, you can use the following ODR code

```
<odr:set value="(m|1|male|mr|mr.)" var="male" />
<odr:set value="(w|2|f|female|mrs|mrs.)" var="female" />
<odr:set value="%{user.data.lastname}" var="lastname" />
<odr:set value="%{lower(user.data.salutation)}" var="salutation" />
<odr:choose>
  <odr:when test="%{!isEmpty(lastname) and (matches(salutation, male) or matches
(salutation, female))}">
    <odr:choose>
      <odr:when test="%{matches(salutation, female)}">
        <odr:out value="Dear Mrs." />
      </odr:when>
      <odr:when test="%{matches(salutation, male)}">
        <odr:out value=Dear Mr." />
      </odr:when>
    </odr:choose>
    <odr:out value=" %{lname}" />
  </odr:when>
  <odr:otherwise>
    <odr:out value="Dear Sir or Madam" />
  </odr:otherwise>
</odr:choose>
```

Tip: The code example assumes that the recipient list field contains the values *M*, *1*, *Male*, *Mr*, *Mr.* or *W*, *2*, *F*, *Female*, *Mrs*, *Mrs.*.

Note: If *Mr* and *Mrs* are queried, the female salutation must be given first, since *Mr* applies to both *male* and *female*. Otherwise, the male salutation is always displayed.

Multiple salutations

If you have multiple recipient list fields for different salutations, you can use the following ODR code as default replacement:

Note: You must reference appropriate recipient list fields for both salutations and last names.

```
<odr:set value="%{lower(user.data.salutation)}" var="salut"/>
<odr:set value="%{user.data.lastname}" var="lname"/>
<odr:set value="%{lower(user.data.salutation2)}" var="salut2"/>
<odr:set value="%{user.data.lastname2}" var="lname2"/>
```

```
<odr:choose>
  <odr:when test="%{(not isEmpty(lname) and (salut eq 'mr' or salut eq 'mrs'))
and (not isEmpty(lname2) and (salut2 eq 'mr' or salut2 eq 'mrs'))}">
    <odr:choose>
      <odr:when test="%{(salut eq 'mrs') and (salut2 eq 'mrs')}">
        <odr:out value="Dear Mrs. %{lname}," />
        <odr:out value="&lt;br&gt;"/>
        <odr:out value="dear Mrs. %{lname2},"/>
      </odr:when>
      <odr:when test="%{(salut eq 'mr') and (salut2 eq 'mrs')}">
        <odr:out value="Dear Mrs. %{lname2}," />
        <odr:out value="&lt;br&gt;"/>
        <odr:out value="dear Mr. %{lname},"/>
      </odr:when>
      <odr:when test="%{(salut eq 'mrs') and (salut2 eq 'mr')}">
        <odr:out value="Dear Mrs. %{lname}," />
        <odr:out value="&lt;br&gt;"/>
        <odr:out value="dear Mr. %{lname2},"/>
      </odr:when>
      <odr:when test="%{(salut eq 'mr') and (salut2 eq 'mr')}">
        <odr:out value="Dear Mr. %{lname}," />
        <odr:out value="&lt;br&gt;"/>
        <odr:out value="dear Mr. %{lname2},"/>
      </odr:when>
    </odr:choose>
  </odr:when>
  <odr:otherwise>
    <odr:out value="Dear Sir or Madam" />
  </odr:otherwise>
</odr:choose>
```

You must also add the following ODR code as text content:

> **Note:** You must reference appropriate recipient list fields for both salutations and last names.

```
<odr:set value="%{lower(user.data.salutation)}" var="salut"/>
<odr:set value="%{user.data.lastname}" var="lname"/>
<odr:set value="%{lower(user.data.salutation2)}" var="salut2"/>
<odr:set value="%{user.data.lastname2}" var="lname2"/>
<odr:set value="%{character('10')}" var="br"/>
<odr:choose>
  <odr:when test="%{(not isEmpty(lname) and (salut eq 'mr' or salut eq 'mrs'))
and (not isEmpty(lname2) and (salut2 eq 'mr' or salut2 eq 'mrs'))}">
    <odr:choose>
      <odr:when test="%{(salut eq 'mrs') and (salut2 eq 'mrs')}">
        <odr:out value="Dear Mrs. %{lname}," />
        <odr:out value="%{br}"/>
        <odr:out value="dear Mrs. %{lname2},"/>
      </odr:when>
```

© Optimizely 2022

```
      <odr:when test="%{(salut eq 'mr') and (salut2 eq 'mrs')}">
        <odr:out value="Dear Mrs. %{lname2}," />
        <odr:out value="%{br}"/>
        <odr:out value="dear Mr. %{lname},"/>
      </odr:when>
      <odr:when test="%{(salut eq 'mrs') and (salut2 eq 'mr')}">
        <odr:out value="Dear Mrs. %{lname}," />
        <odr:out value="%{br}"/>
        <odr:out value="dear Mr. %{lname2},"/>
      </odr:when>
      <odr:when test="%{(salut eq 'mr') and (salut2 eq 'mr')}">
        <odr:out value="Dear Mr. %{lname}," />
        <odr:out value="%{br}"/>
        <odr:out value="dear Mr. %{lname2},"/>
      </odr:when>
    </odr:choose>
  </odr:when>
  <odr:otherwise>
    <odr:out value="Dear Sir or Madam" />
  </odr:otherwise>
</odr:choose>
```

Velocity

You can use the following Velocity code as standard replacement for the personalized salutation *Dear Mrs.*, *Dear Mr.* or *Dear Sir or Madam*:

> **Tip:** To convert special characters into HTML code, the Velocity code includes the function `$HtmlUtils.encodeEntities()`.

```
#set($salutation = $!user.data.salutation)
#set($lastname = $!user.data.lastname)
#if (!$StringHelper.isEmpty($salutation) && !$StringHelper.isEmpty($lastname) &&
($salutation.equals("Mr") || $salutation.equals("Mrs")))
  #if ($salutation.equals("Mr"))
    Dear Mr.
  #else
    Dear Mrs.
  #end
  $HtmlUtils.encodeEntities($user.data.lastname)
#else
  Dear Sir or Madam
#end
```

You must also add the following Velocity code (without the function `$HtmlUtils.encodeEntities()`) as single-line text content:

```
#set($salutation = $!user.data.salutation)#set($lastname = $!user-
.data.lastname)#if (!$StringHelper.isEmpty($salutation) && !$StringHelper.isEmpty
($lastname) && ($salutation.equals("Mr") || $salutation.equals("Mrs")))#if ($sa-
lutation.equals("Mr"))Dear Mr. #else$!{null}Dear Mrs. #end$user-
.data.lastname#else$!{null}Dear Sir or Madam#end
```

Recipient data

This topic describes how you can use field functions to process recipient data and modify texts and time specifications.

> **Note:** Use your specific data and recipient list fields, and test the field functions before using them in a mailing.

Formatting dates

For example, if you have a recipient list field for the date of the last purchase, you can use a field function to display the date in the mailing text: *We miss you! You last ordered something on 14.01.2020 and we would be happy to see you again! Enclosed you will find a $10 shopping voucher!*

Since the date is stored in a standard format and would be displayed in the mailing text as *2020-01-14 10:12:00.0*, for example, you can format the date using the following Velocity code:

```
$DateTimeHelper.formatDate("dd.MM.yyyy", $user.data.date)
```

Displaying dates from recipient list fields

To display dates from recipient list fields as formatted text, you can use the following Velocity code:

```
#if(!$StringHelper.isEmpty($!user.data.date))$DateTimeHelper.formatDate
("dd.MM.yyyy", $user.data.date)#end
```

Displaying the current date

To display the current date as formatted text, you can use the following Velocity code:

```
$DateTimeHelper.formatDate("dd.MM.yyyy", $DateTimeHelper.getCurrentDate().getTime
())
```

Displaying the current calendar week

To display the current calendar week as formatted text, you can use the following Velocity code:

```
$DateTimeHelper.formatDate("ww", $DateTimeHelper.getCurrentDate().getTime(), $Com-
mon.locale("en", "EN", ""))
```

Displaying periods in years

To output the period in years between the current date and the date in a recipient list field as formatted text, you can use the following Velocity code:

```
#set($date = $user.data.DATE_RECIPIENT_LIST_FIELD_NAME)
#if ($StringHelper.isEmpty($date))
  #set($date = $DateTimeHelper.getCurrentDate().getTime())
#end

#set($durationList = $StringHelper.splitToList($DateTimeHelper.getDuration
($date), 'd', false, true))
#if ($durationList.size() > 1)
  #set ($days = $StringHelper.string2int($durationList.get(0), 0))
#else
  #set ($days = 0)
#end

#set($years = $days / 365)
#if ($years >= 1)
  You are our customer for #if ($years == 1)year#else$years years#end!
#end
```

> **Tip:** The Velocity code displays, for example, the following text: *You are our customer for 26 years!*

Numbers and comparisons

You can use Velocity to compare numbers from recipient list fields.

Greater than

```
#if($user.data.RECIPIENTLISTFIELD > 10)
  OUTPUT
#end
```

Greater or equal

```
#if($user.data.RECIPIENTLISTFIELD >= 10)
  OUTPUT
#end
```

Less than

```
#if($user.data.RECIPIENTLISTFIELD < 10)
  OUTPUT
#end
```

Less or equal

```
#if($user.data.RECIPIENTLISTFIELD <= 10)
  OUTPUT
#end
```

Equal

```
#if($user.data.RECIPIENTLISTFIELD == 10)
  OUTPUT
#end
```

Unequal

```
#if($user.data.RECIPIENTLISTFIELD != 10)
  OUTPUT
#end
```

Generating random numbers

To generate a random number, for example to load a random image from the file server, you can use the following Velocity code:

```
#set ($random = $MathHelper.random(10))$random
```

> **Tip:** The Velocity code displays a number between 0 and 10. It can also be a 0.

Replacing texts

To replace text from recipient list fields (for example HTML code with special characters for the text version), you can add the following ODR code as text content:

```
<odr:set value="%{user.data.RECIPIENTLISTFIELD}" var="content"/>
<odr:set value="WHAT" var="what"/>
<odr:set value="WITH" var="with"/>

<odr:set value="%{replace(content,what,with)}" var="newtext"/>
<odr:out value="%{newtext}"/>
```

Adding blank lines to the text version

To convert HTML breaks (`<br>`) to blank lines for the text version, you can add the following ODR code as text content:

```
<odr:set value="%{user.data.RECIPIENTLISTFIELD}" var="content"/>
<odr:set value="WHAT" var="what"/>
<odr:set value="%{character('10')}" var="with"/>
```

```
<odr:set value="%{replace(content,what,with)}" var="newtext"/>
<odr:out value="%{newtext}"/>
```

Upper or lower case letters

You can use the following Velocity code to display text from recipient list fields as upper-case letters:

```
$user.data.RECIPIENTLISTFIELD.toUpperCase()
```

You can use the following Velocity code to display text from recipient list fields as lower-case letters:

```
$user.data.RECIPIENTLISTFIELD.toLowerCase()
```

Generating bar codes

If you use the coupon system to generate machine-readable bar codes, you can use Velocity to create bar code field functions based on your recipient list fields.

To create bar code field functions, you need the following information:

- **Recipient list field**. Internal name of the recipient list field you want to use for the bar code.
- **Bar code type**. Select one of the following bar code types:
  - **EAN-13 bar code**. Use the value *ean13barcode*.
  - **Code 128 bar code**. Use one of the following values:
    - Default character set: *code128barcode* (automatically switches between the character sets A, B, and C)
    - Character set A: *code128abarcode*
    - Character set B: *code128bbarcode*
    - Character set C: *code128cbarcode*
  - **Interleaved 2 of 5 bar code**. Use the value *twooffivebarcode*.

> **Tip:** For more information about bar code types, see Creating coupon blocks.

- **Bar code size**. You can specify the bar code size using the *width and height* in pixels or the *line thickness* in pixels (1-10). If you do not specify any size, the default size of 350 pixels (width) and 200 pixels (height) is used.

Insert the field function into your mailing using the image tag (**). Alternatively, you can create the field function directly with image tag, for example, `<img src="${barcodeCouponImage.getImageUrlFor($user-.data.coupon, "twooffivebarcode", 9)}"/>`.

Width and height size option

```
${barcodeCouponImage.getImageUrlFor($user.data.RECIPIENTLISTFIELD, "BARCODETYPE",
WIDTH, HEIGHT)}
```

Line thickness size option

```
${barcodeCouponImage.getImageUrlFor($user.data.RECIPIENTLISTFIELD, "BARCODETYPE",
LINETHICKNESS)}
```

Generating QR codes

If you use the coupon system to generate machine-readable QR codes, you can use Velocity to create QR code field functions based on your recipient list fields.

To create QR code field functions, you need the following information:

- **Recipient list field**. Internal name of the recipient list field you want to use for the QR code.
- **Bar code type**. For the line thickness size option, specify the type `"qrcode"`.
- **QR code size**. You can specify the QR code size using the *width and height* in pixels (100-1850) or the *line thickness* in pixels (1-10).

Insert the field function into your mailing using the image tag (**). Alternatively, you can create the field function directly with image tag, for example, `<img src="${barcodeCouponImage.getImageUrlForQrCode($user-.data.coupon, 300)}"/>`.

Width and height size option

```
${barcodeCouponImage.getImageUrlForQrCode($user.data.RECIPIENTLISTFIELD,
WIDTHANDHEIGHT)}
```

Line thickness size option

```
${barcodeCouponImage.getImageUrlFor($user.data.RECIPIENTLISTFIELD, "qrcode",
LINETHICKNESS)}
```

Mailing details

This topic describes how to process mailing details using field functions.

> **Note:** Use your specific data and recipient list fields, and test the field functions before using them in a mailing.

Displaying an email's dispatch date

To display an e-mail's dispatch date as formatted text, you can use the following Velocity code:

```
#if($user.data.bmIsOnlineVersion)$DateTimeHelper.formatDate('dd.MM.yyyy',
$m2u.created)#else$DateTimeHelper.formatDate('dd.MM.yyyy', $DateTimeHelp-
er.getCurrentDate().getTime())#end
```

> **Tip:** The dispatch date refers to the time when the online version of the email (`bmIsOnlineVersion`) is created. This is most important for transactional mails, where the actual dispatch of the email only starts as soon as a trigger (such as *generated post-click*) is fired or an event (such as anniversary) occurs.

Processing the dispatch date

To display the dispatch date plus a defined time period as formatted text, you can use the following Velocity code:

```
#set($daysToAdd = 50)#if($user.data.bmIsOnlineVersion)$DateTimeHelper.formatDate
('dd.MM.yyyy', $DateTimeHelper.addDays($m2u.created, $daysToAd-
d))#else$DateTimeHelper.formatDate('dd.MM.yyyy', $DateTimeHelper.addDays
($DateTimeHelper.getCurrentDate().getTime(), $daysToAdd))#end
```

> **Tip:** The Velocity code adds 50 days to the dispatch date. This is useful, for example, to indicate the validity of promotional offers.

Displaying the sender's address

To display the email's sender's address, you can use the following Velocity code:

```
$mailing.mailingConfig.messageConfig.header.from.email.render(null)
```

Displaying the recipient list name

To display the recipient list name, you can use the following Velocity code:

```
$user.data.userlist.name
```

To use the recipient list name in a URL, you must encode it first:

```
$NetHelper.urlEncode($user.data.userlist.name)
```

Displaying the recipient list ID

To display the recipient list ID, you can use the following Velocity code:

```
$user.data.userlist.id
```

© Optimizely 2022

Displaying the recipient ID

To display the recipient ID, you can use the following Velocity code:

```
$user.data.id
```

Displaying the client ID

To display the client ID, you can use the following Velocity code:

```
$mailing.mailingGroup.id
```

Displaying the client name

To display the client name, you can use the following Velocity code:

```
$mailing.mailingGroup.name
```

Displaying the mailing name

To display the mailing name, you can use the following Velocity code:

```
$mailing.name
```

Displaying the mailing description

To display the mailing description, you can use the following Velocity code:

```
#if (!$StringHelper.isEmpty($mailing.description))$NetHelper.urlEncode($mail-
ing.description)#else$!{null}unknown#end
```

> **Tip:** The mailing description is displayed URL-encoded, for example *This+is+a+test+mailing*. If no description is available, *unknown* is displayed.

Comparing recipients with target groups

To check whether a recipient belongs to a certain target group and display a corresponding text, you can use the following Velocity code:

```
#if($filter.filterByRevisionedFilters("TARGETGROUPID", false))Foo#else$!
{null}Bar#end
```

> **Tip:** In the Velocity code, *Foo* is the output if the recipient belongs to the target group and *Bar* is the output if the recipient does not belong to the target group.

Displaying the image host

To display the host of the file server where an image is stored, you can use the following ODR code:

```
<odr:set value="%{imageHost(m2u)}" var="host"/>
<odr:out value="%{host}"/>
```

Yo can also display the image host using the following Velocity code:

```
$!bmOdr.out("%{imageHost(m2u)}")$!{null}
```

External data

This topic describes how to process external data using field functions.

> **Note:** Use your specific data and recipient list fields, and test the field functions before using them in a mailing.

Displaying a JSON string as text in a mailing

If you retrieve data via API and store it as a JSON string, you can display the content as text with the following velocity code:

```
#set ($jsonContent = $json.readFromString(${jsonString}))
```

If recipient list fields contain data as JSON, you can display the content as text using the following velocity code:

```
#set ($jsonContent = $json.readFromString($!{user.data.RECIPIENTLISTFIELD}))
```

Example

You have a recipient list with a *custom* field in text format that contains the following JSON string:

```
{"clearname": "John Smith", "unsubscribelink": "http://www.ex-
ample.com/unsubscribe/user-id-1234"}
```

In the mailing, you can use the JSON string using velocity code as follows:

```
#set ($jsonContent = $json.readFromString($!{user.data.custom}))
Hello ${jsonContent.clearname}! To unsubscribe from the newsletter, click <a href-
f="${jsonContent.unsubscribelink}">here</a>.
```

Displaying post-click data

Velocity lets you access the following post-click data and display it in a mailing:

- service ("name_of_service")
- stringValue("x")
  - is()
  - isNot()
- floatValue("X")
  - isGreaterThan("y")
  - isLessThan("y")

- isGreaterThanOrEqualTo("y")
- isLessThanOrEqualTo("y")

> **Tip:** Using velocity field functions, you can display only the most recent post-click data. You cannot display older data.

Example

The following Velocity code lets you display the value of *gvalue10* in the *serviceName* service:

```
#set($strGvalue = $!postClick.find().where().service().is("ser-
viceName").getStringResult(10))
$strGvalue
```

Special functions

This topic describes special field functions in Velocity and ODR.

> **Note:** Use your specific data and recipient list fields, and test the field functions before using them in a mailing.

Different unsubscribe confirmation pages by recipient list

By default, the unsubscribe link in the mailing only redirects to one confirmation page. To display different unsubscribe confirmation pages depending on the recipient list (such as by language), you can use the following ODR code:

```
<odr:set value="%{user.data.userlist.id}" var="elid"></odr:set>
<odr:set value="(RECIPIENTLISTID_01|RECIPIENTLISTID_02)" var="de" ></odr:set>
<odr:set value="(RECIPIENTLISTID_03)" var="pl" ></odr:set>
<odr:choose>
  <odr:when test="%{matches(elid,de) or matches(elid,pl)}">
    <odr:choose>
      <odr:when test="%{matches(elid,de)}">
        <odr:out value="http://api.campaign.episerver.net/http/mail/{bmMailId}/un-
subscribe?bmUrl=http://www.srv2.de/unsubscribe.html"></odr:out>
      </odr:when>
```

```
      <odr:when test="%{matches(elid,pl)}">
        <odr:out value="http://api.campaign.episerver.net/http/mail/{bmMailId}/un-
subscribe?bmUrl=http://www.srv2.de/unsubscribe_pl.html"></odr:out>
      </odr:when>
    </odr:choose>
  </odr:when>
  <odr:otherwise>
    <odr:out value="http://api.campaign.episerver.net/http/mail/{bmMailId}/un-
subscribe?bmUrl=http://www.srv2.de/unsubscribe_en.html" ></odr:out>
  </odr:otherwise>
</odr:choose>
```

In this example, all recipients who are addressed via the recipient lists with the IDs *RECIPIENTLISTID_01* or *RECIPIENTLISTID_02* are forwarded to the German confirmation page after clicking the unsubscribe link. Recipients who are addressed via the recipient list with the ID *RECIPIENTLISTID_03* are forwarded to the Polish confirmation page after clicking the unsubscribe link. Fallback is the English confirmation page.

Different unsubscribe confirmation pages by language

The following ODR code lets you redirect recipients whose language is stored in a recipient list field to the appropriate language version of the confirmation page after they click the unsubscribe link:

```
<odr:set value="%{lower(user.data.language)}" var="language"></odr:set>
<odr:set value="(german)" var="de" ></odr:set>
<odr:set value="(polish)" var="pl" ></odr:set>
<odr:choose>
  <odr:when test="%{matches(language,de) or matches(lang,pl)}">
    <odr:choose>
      <odr:when test="%{matches(language,de)}">
        <odr:out value="http://api.campaign.episerver.net/http/mail/{bmMailId}/un-
subscribe?bmUrl=http://www.srv2.de/unsubscribe.html"></odr:out>
      </odr:when>
      <odr:when test="%{matches(language,pl)}">
        <odr:out value="http://api.campaign.episerver.net/http/mail/{bmMailId}/un-
subscribe?bmUrl=http://www.srv2.de/unsubscribe_pl.html"></odr:out>
      </odr:when>
    </odr:choose>
  </odr:when>
  <odr:otherwise>
    <odr:out value="http://api.campaign.episerver.net/http/mail/{bmMailId}/un-
subscribe?bmUrl=http://www.srv2.de/unsubscribe_en.html" ></odr:out>
  </odr:otherwise>
</odr:choose>
```

Different online versions by language

The following Velocity codes let you display a text in the email header with a link to the online version of the mailing in different languages. Depending on which language is stored in the *language* recipient list field, the corresponding language version is displayed.

Online version with sending domain and mail ID

```
#set($lang = $!user.data.language.toLowerCase())
#if ($lang.equals("de"))
Wenn diese E-Mail nicht richtig angezeigt wird, klicken Sie <a href-
f="https://www.example.com/ov?m2u={bmMailId}">hier</a>.<br />
#else
If this email does not display correctly <a href="https://www.example.com/ov?m2u=
{bmMailId}">click here</a> to view the online version.<br />
#end
```

> **Note:** If you change the shipping domain, the online version can no longer be retrieved.

Online version via HTTP API

```
#set($lang = $!user.data.language.toLowerCase())
#if ($lang.equals("de"))
Wenn diese E-Mail nicht richtig angezeigt wird, klicken Sie <a href-
f="https://api.campaign.episerver.net/http/mail/{bmMailId}/on-
lineversion?bmMailingId=$mailing.id">hier</a>.<br />
#else
If this email is not displayed correctly <a href-
f="https://api.campaign.episerver.net/http/mail/{bmMailId}/on-
lineversion?bmMailingId=$mailing.id">click here</a> to view the online
version.<br />
#end
```

> **Tip:** This Velocity code makes the online version independent of the sending domain.

Hashing and encoding

This topic describes how to encode data and create hash values using field functions.

> **Note:** Use your specific data and recipient list fields, and test the field functions before using them in a mailing.

Base64

Base64 is an encoding method to not display data in clear text.

> **Note:** Base64 is not an encryption method, as you can decode the encoded data.

To encode the content of a recipient list field using Base64, you can use the following Velocity code as a default replacement:

```
#if(!$StringHelper.isEmpty($!user.data.RECIPIENTLISTFIELD))${bmMisc.encodeBase64
($user.data.RECIPIENTLISTFIELD)}#end
```

> **Tip:** Since the contents of recipient list fields can also be empty (unknown, NULL value), the code example converts possible NULL values into empty string values.

MD5

MD5 is a hash method that lets you create checksums, for example to verify data integrity.

> **Note:** MD5 is not an encryption method. Hashing is not reversible. In addition, MD5 is not collision free, because different inputs can lead to the same hash value.

© Optimizely 2022

The following field function templates additionally use a key to increase the security factor:

Velocity

```
#set ($key = "1234567890")
#set ($string = "STRINGWERT$key")
$StringHelper.md5($string)
```

ODR

```
<odr:set var="key" value="1234567890" />
<odr:set var="string" value="STRINGWERT%{key}" />
<odr:out value="%{md5(string)}" />
```

MD5 and Base64

The following Velocity code uses a key (`0123456789`) for MD5 hashing. The recipient data is encoded using Base64. The code also checks if the recipient list field is empty. Finally, the function `$StringHelper.md5()` generates a hash value from the sequential Base64 values.

```
#set($key = "0123456789")
#set($email = "$bmMisc.encodeBase64($!user.data.email)")
#if(!$StringHelper.isEmpty($!user.data.salutation))
  #set($salutation = "$bmMisc.encodeBase64($!user.data.salutation)")
#end
#if(!$StringHelper.isEmpty($!user.data.firstname))
  #set($firstname = "$bmMisc.encodeBase64($!user.data.firstname)")
#end
#if(!$StringHelper.isEmpty($!user.data.lastname))
  #set($lastname = "$bmMisc.encodeBase64($!user.data.lastname)")
#end
#if(!$StringHelper.isEmpty($!user.data.sender))
  #set($sender = "$bmMisc.encodeBase64($!user.data.sender)")
#end
#set($name = "$bmMisc.encodeBase64($mailing.name)")
#if(!$StringHelper.isEmpty($!user.data.shopsource))
  #set($shopsource = "$bmMisc.encodeBase64($!user.data.shopsource)")
#end
#set($string = "$!e-
mail$!salutation$!firstname$!lastname$!sender$!name$!shopsource$!key")
$StringHelper.md5("$string")
```

SHA256

SHA256 is another method to create hash values from recipient data.

> **Note:** SHA256 can only process String values in Velocity.

To encode the content of a recipient list field using SHA256, you can use the following Velocity code as your default replacement:

```
#set($string = "STRINGVALUE")
$StringHelper.sha256($string)
```

SHA256 and Base64

The following Velocity Code uses SHA256 and Base64 to encode the recipient's email address:

```
${bmMisc.hashSha256AndEncodeBase64($user.data.email)}
```

Coupon system

> **Note:** To enable this feature, contact customer support.

The coupon system lets you:

- Include coupon codes in mailings that recipients may redeem in your web shop.
- Integrate blocks of coupon codes with a placeholder.
- Manually or automatically add coupon codes to a coupon block.
- On request: Display coupon codes as machine-readable bar codes or QR codes.

You can manage the coupon system via the Optimizely Campaign user interface. You can also manage the coupon system remotely using the following Optimizely Campaign programming interfaces:

- REST API
- SOAP API via web services CouponBlockWebservice and CouponCodeWebservice

Assigning coupon codes

During dispatch, static or dynamic coupon codes are assigned to the mailings and recipients (MailingToUser ID). This ensures that each coupon code of a coupon block is only sent once.

Tracking coupon codes sent in a mailing

In the Manage Coupon Blocks window, click **Download Assignments** to download the assignment of sent coupon codes in a CSV file. The file contains the

- coupon block ID
- coupon code
- recipient ID (generally, the email address)
- recipient list ID
- mailing ID
- mailing's creation and modification dates

Inserting coupon codes in a mailing

To send coupon codes in a mailing, insert a placeholder where the code will be displayed. Find the placeholder in the **Details** area of the **Manage Coupon Blocks** window.

```
{Coupon Block:12345678901}
```

The coupon code is displayed as plain text in the email.

If you want to send several coupons in an email, use several coupon blocks. However, if you insert the same placeholder several times in a mailing, only one coupon code is sent.

Testing emails

By default, coupon codes in test emails are disabled, and a special placeholder with no function replaces the active coupon code.

© Optimizely 2022

To enable real coupon codes for test cases, check the box **Use valid coupon codes in test emails** in the details of a coupon block or when creating coupon blocks.

Coupon blocks

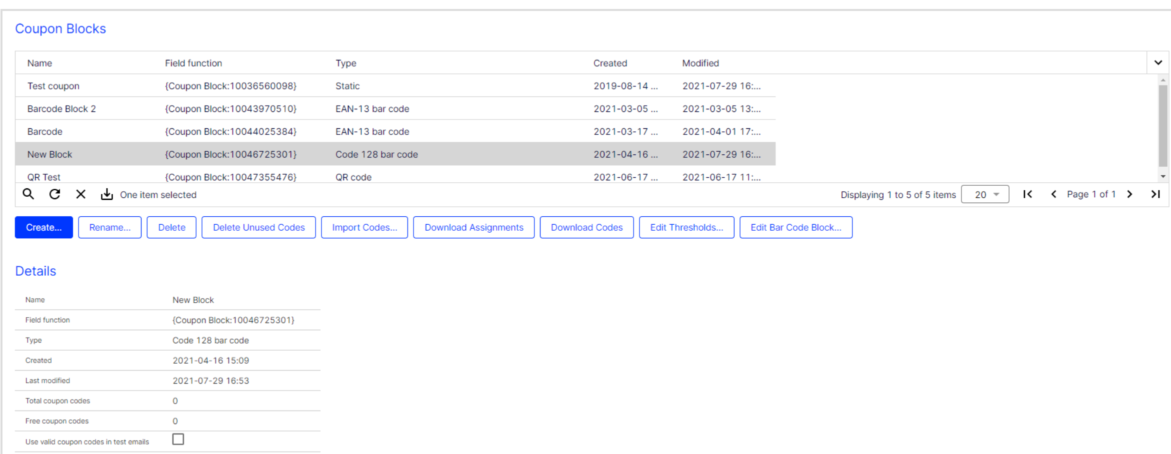
Coupon codes are organized using containers known as *coupon blocks*. You manage coupon blocks on a client level, so you can use the same coupon block in multiple mailings in your client.

A mailing may only contain one coupon code from the same coupon block. If you insert two coupon codes from the same block, the mailing displays the same code twice but uses only one coupon code.

In contrast, if you want recipients to receive several different coupons in a mailing, include coupon codes from different coupon blocks. Also, a recipient can receive several coupon codes from the same coupon block if they are sent in separate mailings.

Managing coupon blocks

To manage and edit coupon blocks, open the Optimizely Campaign menu and select **More** > **Manage Coupon Blocks**.



In the list, click a coupon code to display its details.

- **Name**. Used internally by the coupon code system.
- **Field function**. Use this placeholder to insert the coupon block in a mailing.

- **Type**. One of the following:
  - **Static**
  - **Generated**
  - **EAN-13 bar code**
  - **Code 128 bar code**
  - **Interleaved 2 of 5 bar code**
  - **QR code**
- **Created**. The creation date of the coupon block.
- **Last modified**. The modification date of the coupon block.
- **Total coupon codes**. Number of codes a coupon block contains (for static and bar code blocks) or how many codes were already generated (for generated blocks).
- **Free coupon codes**. Number of free codes in a coupon block. For generated coupon blocks, the value is infinite.
- **Use valid coupon codes in test emails**. Check this box to use valid coupon codes in your test emails.

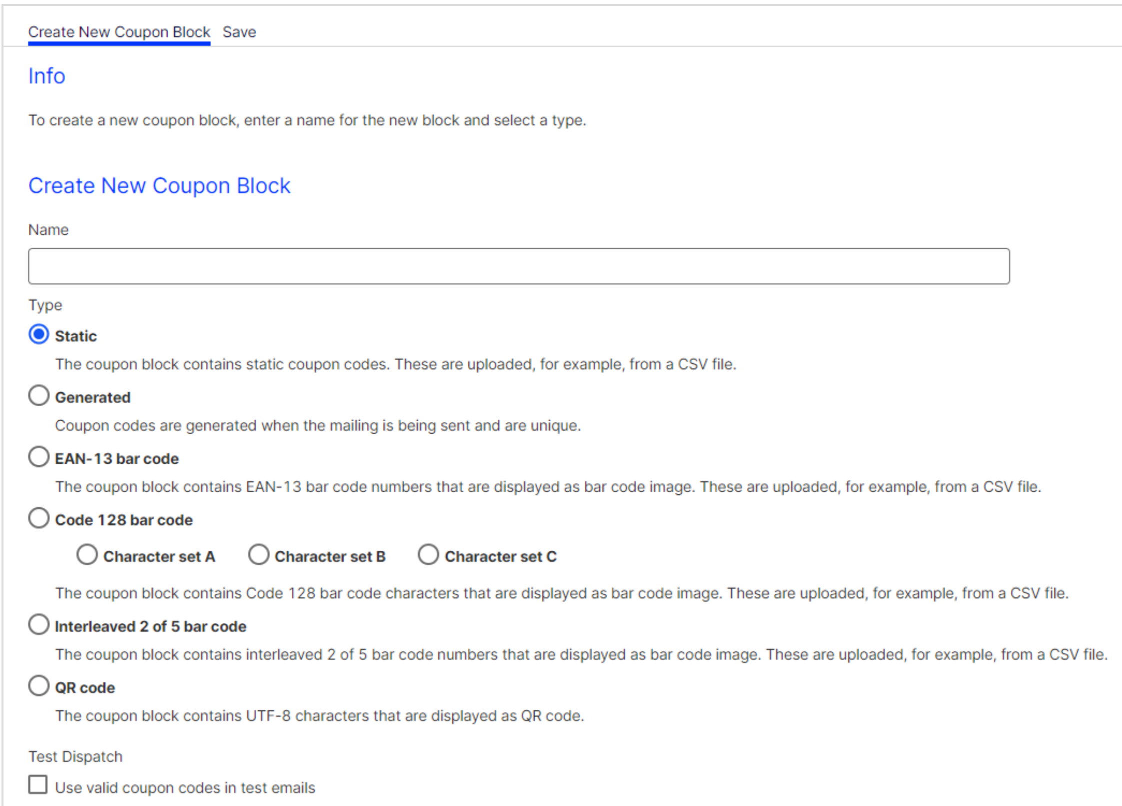
The buttons below the overview let you perform the following actions:

- Creating coupon blocks
- Renaming coupon blocks
- Deleting coupon blocks
- Deleting unused codes
- Importing codes
- Downloading assignments
- Downloading codes
- Editing thresholds
- Editing bar code blocks

Creating coupon blocks

Prerequisite: If you want use static coupon blocks, you must first import them. See Importing codes.

1. In the overview, , click **Create…**. The **Create New Coupon Block** window opens.
2. In the **Name** box, enter a descriptive name for the coupon block, so you can identify it later.



3. In the **Type** area, select a coupon block type.

> **Tip:** Bar codes and QR codes are additional features to be requested from customer support.

- **Static**. Use if you want to release a limited number of coupon codes or generate coupon codes from your CMS. Static coupon blocks are imported into Optimizely Campaign in a CSV file format. See Importing codes.
- **Generated**. Coupon blocks are dynamically generated by Optimizely Campaign during dispatch and are typically unlimited. These coupons are generated with one coupon block.

- **EAN-13 bar code**. Bar code blocks convert a 13-digit code into a machine-readable bar code and insert it as a graphic into a mailing. The encoding of the bar code conforms to the EAN-13 specification. The coupon system ensures that bar codes are unique and only used once. No items are encoded, but a unique code is assigned to each recipient. To manually import coupon codes into a bar code block, see Importing codes.
- **Code 128 bar code**. Bar code blocks convert an alphanumeric code of any length into a machine-readable bar code and insert it as a graphic into a mailing. The Code 128 bar code supports the full ASCII character set and automatically switches between the Code 128 bar code character sets A, B, and C to best encode your data.

  You can also select the Code 128 bar code character set manually:

  - **Character set A**. Supports the ASCII character set without lower case letters.
  - **Character set B**. Supports the ASCII character set without control codes.
  - **Character set C**. Supports pairs of digits from *00* to *99*.

  To manually import coupon codes into a bar code block, see Importing codes.

- **Interleaved 2 of 5 bar code**. Bar code blocks convert a numeric code of any length into a machine-readable bar code and insert it as a graphic into a mailing. The Interleaved 2 of 5 bar code is a numeric bar code that only supports pairs of digits from *00* to *99*. To manually import coupon codes into a bar code block, see Importing codes.
- **QR code**. QR code blocks convert an alphanumeric code of any length into a machine-readable QR code and insert it as a graphic into a mailing. The QR code supports the full UTF-8 character set. To manually import coupon codes into a QR code block, see Importing codes.

4. To use valid coupon codes in your test emails, check the **Use valid coupon codes in test emails** box.
5. Click **Save**.

> **Tip:** For more individual coupons you can also use field functions to create bar codes and QR codes that refer to a specific recipient list field. See **Recipient data**.

Renaming coupon blocks

In the overview, select the coupon block you want to rename and click **Rename...**. Enter a new name and click **Submit**.

Deleting coupon blocks

In the overview, select the coupon block you want to delete and click **Delete Block** > **Delete**. Coupons in the block that have been sent but not redeemed remain valid.

> **Note:** When deleting a coupon block, its histories and any assignments are lost.

Deleting unused codes

In the overview, select the coupon block you want to empty and click **Delete Unused Codes**. Unused codes are deleted, but the block remains intact. Later, you can add new coupon codes to the block.

> **Note:** You can only delete unused codes in static and bar code coupon blocks.

Importing codes

Prerequisite: Your computer contains coupon codes in a CSV file. The file should only contain one column with the codes. You should know the CSV file's encoding, column delimiter, escape character, and if the CSV file contains a header row.

To learn how to define the minimum number of codes for that block, see Editing thresholds.

> **Note:** Codes for EAN-13 bar code coupon blocks must consist of a 13-digit number, digits only. Codes for Interleaved 2 of 5 bar code coupon blocks can consist of any number of digits, but the number

© Optimizely 2022

> must be even.

1. In the overview, select the coupon block to which you want to import codes.
2. Click **Import Codes...**. The **Import Coupon Codes** window opens.
3. Click **Browse...** and select the CSV file that contains coupon codes to be imported.
4. Click **Preview**.
5. In the **File Charset** drop-down list, select the encoding used in the CSV file. If you are not sure about this, select **Auto**.
6. In the **Column Delimiter** drop-down list, select the character (semicolon, comma, tabulator, and so on) that separates the data fields in the uploaded file.
7. In the **Escape Character** drop-down list, select the character with which each individual data field is enclosed. Some database programs use a single quote (') or double quote (") around each data field when exporting.
8. If the CSV file contains a header, in the **Skip First Row** drop-down list, select **Yes**.
9. Optionally, in the **Maximum Number of Rows to Preview** drop-down list, select the number of records to display in the preview.
10. Click **Refresh Preview** to reload the records.
11. Click **Import Coupon Codes**. The last tab shows how many codes were imported.

After the import, the coupon block is ready for use.

Downloading assignments

To download a CSV file containing the already used coupon codes and their corresponding mailing and recipient assignments:

1. In the overview, click the desired coupon block.
2. Click **Download Assignments**.

Downloading codes

To download codes of a coupon block:

1. In the overview, select the desired coupon block.
2. Click **Download Codes**.

© Optimizely 2022

> **Note:** Due to their inherent unlimited nature, you can only download the list of used coupons as a CSV file for dynamic and bar code coupon blocks.

Editing thresholds

If you are using static or bar code coupon blocks, you must ensure that sufficient coupon codes are available. Depending on the type of mailing, Optimizely Campaign uses several security questions.

To define the threshold values, perform the following steps :

1. In the overview, select the coupon block whose thresholds you want to edit.
2. Click **Edit Thresholds...**.
3. Define the threshold values in the **Configuration** area.
   - **Warning threshold value 1**. Enter an integer warning threshold value for transactional mailings. If this threshold is reached, a notification email is sent, but the sending continues. You should then upload new coupon codes.
   - **Termination threshold value 1**. Enter an integer threshold value for transactional mailings. If this threshold is reached, a notification email is sent and dummy coupon codes with no function are used in the mailing. You must upload new coupon codes.
   - **Warning threshold value 2**. Enter the percentage of recipients of regular and Smart Campaign mailings for which the coupon block must still contain coupon codes after sending. If this threshold is reached, a notification email is sent, but the sending continues. You should upload new coupon codes.
   - **Termination threshold value 2**. Enter the percentage of recipients of regular and Smart Campaign mailings for which the coupon block must still contain coupon codes after sending. If this threshold is reached, the sending is canceled. You must upload new coupon codes before restarting the mailing.
   - **Email addresses**. Enter one or more email addresses to which a notification is sent if a threshold value is reached.
4. Click **Save**.

> **Note: Threshold usage**
>
> For triggered mailings (for example, birthday mailings), the coupon system uses the thresholds for regular mailings. For transactional mailings sent using the REST API, HTTP API or Marketing Automation, the coupon system uses the thresholds for special mailings.

Editing bar code blocks

1. In the overview, select the bar code block you want to edit and click **Edit Bar Code Block…**.
2. Specify the size of the bar code block either through height and width or line thickness:
   - In the **Size Options** drop-down list, select **Height and Width**, and enter the desired values in pixels.
   - In the **Size Options** drop-down list, select **Line Thickness**, and in the **Line Thickness** drop-down list, select a value from 1 to 10 pixels.

Editing QR code blocks

1. In the overview, select the QR code block you want to edit and click **Edit Bar Code Block…**.
2. Specify the size of the QR code block either through height and width or line thickness:
   - In the **Size Options** drop-down list, select **Height and Width**, and enter the desired value in pixels. For example, if you enter *300*, the QR code will have a size of 300x300 pixels.
   - In the **Size Options** drop-down list, select **Line Thickness**, and in the **Line Thickness in (Pixels)** drop-down list, select a value from 1 to 10 pixels.

Countdown timers

> **Note:** To enable this feature, contact customer support.

The countdown timer lets you increase your recipients' attention and conversion rates by counting down the time until your offer runs out.

The countdown timer displays the number of days, minutes, hours and seconds currently remaining on an offer, regardless of when a recipient opens your newsletter. The countdown timer is dynamic, agile and flexible. You can customize the timer and the graphic layout.

The following topics describe how to graphically design offers with a countdown timers and incorporate them into your messages. If you encounter problems, see Troubleshooting countdown timers.

© Optimizely 2022

How it works

Optimizely Campaign support two types of countdown timers:

- Non-animated countdown timer with static display of time remaining.

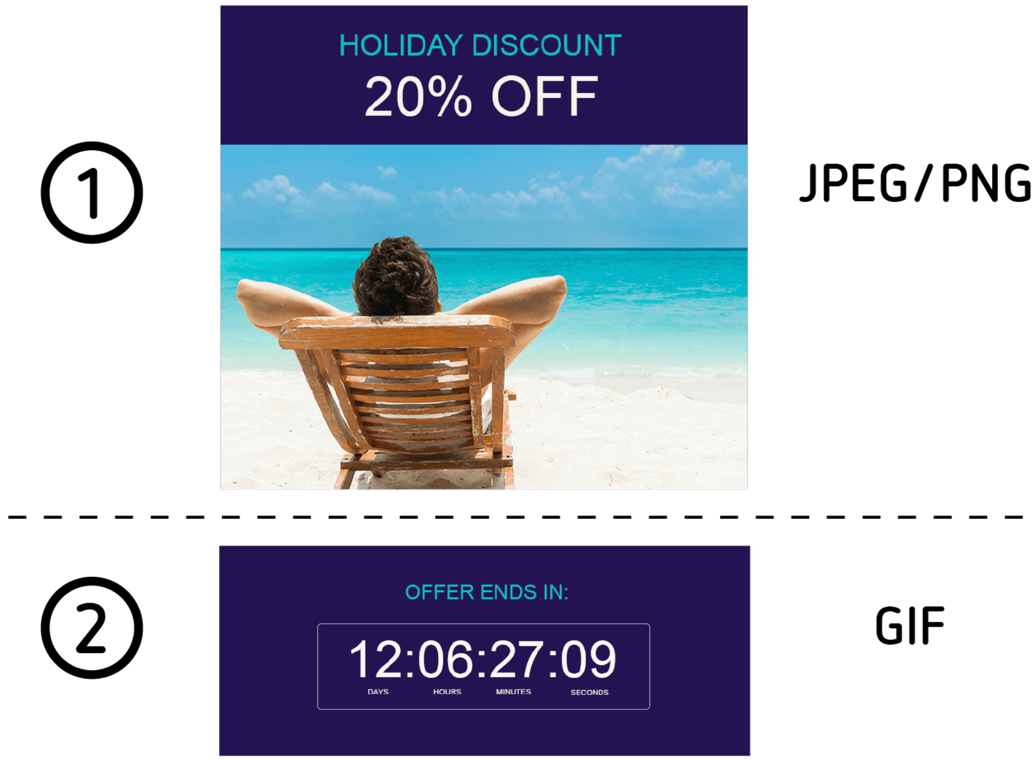
If you integrate a non-animated countdown timer into your mailing, when the recipient opens the mailing, a static image with the currently remaining time is generated, loaded into your mailing, and displayed.

- Animated countdown timer with live countdown.

  If you incorporate an animated countdown timer into your mailing, the counter is active in your top offer for 60 seconds. Animated countdown timers use the GIF (Graphics Interchange Format) image format. This way, the newsletters contains a ticking clock.

> **Note:** If a countdown timer uses a complex graphic design for its background, your animation may be several megabytes, which is too much for a newsletter and your recipients' inbox. So, the countdown timer file size is limited to 1.5 megabytes.

You can create consistent and attractive layouts while keeping the file size small by splitting a product offer into two parts that you bring back together. Save the product image and/or your key visual as a normal image file (JPEG or PNG) and save the counter as a GIF animation in Optimizely Campaign.



Preparing graphics explains how to split a product offer with a countdown timer into two parts then bring them together into a single graphic in your message.

Preparing graphics

> **Tip:** If you want to insert the timer into a message without a graphic or photo, see Creating a countdown timer.

Requirements

To prepare a countdown timer with a background graphic or photo, you need:

- image editing software, such as Adobe Photoshop
- a product image or key visual

Example of preparing graphics

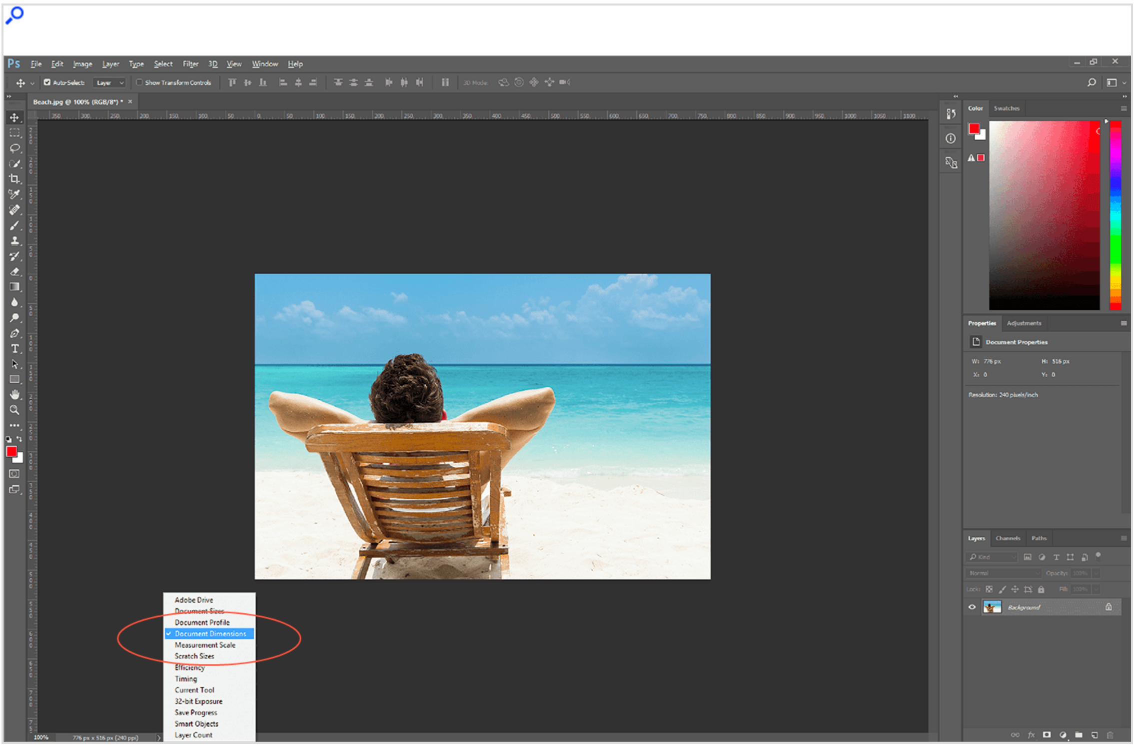
To create a countdown timer with a background graphic or photo, prepare two parts (see How it works):

- the product image or key visual
- the graphic on which the timer will be placed

To prepare both parts, follow these steps.

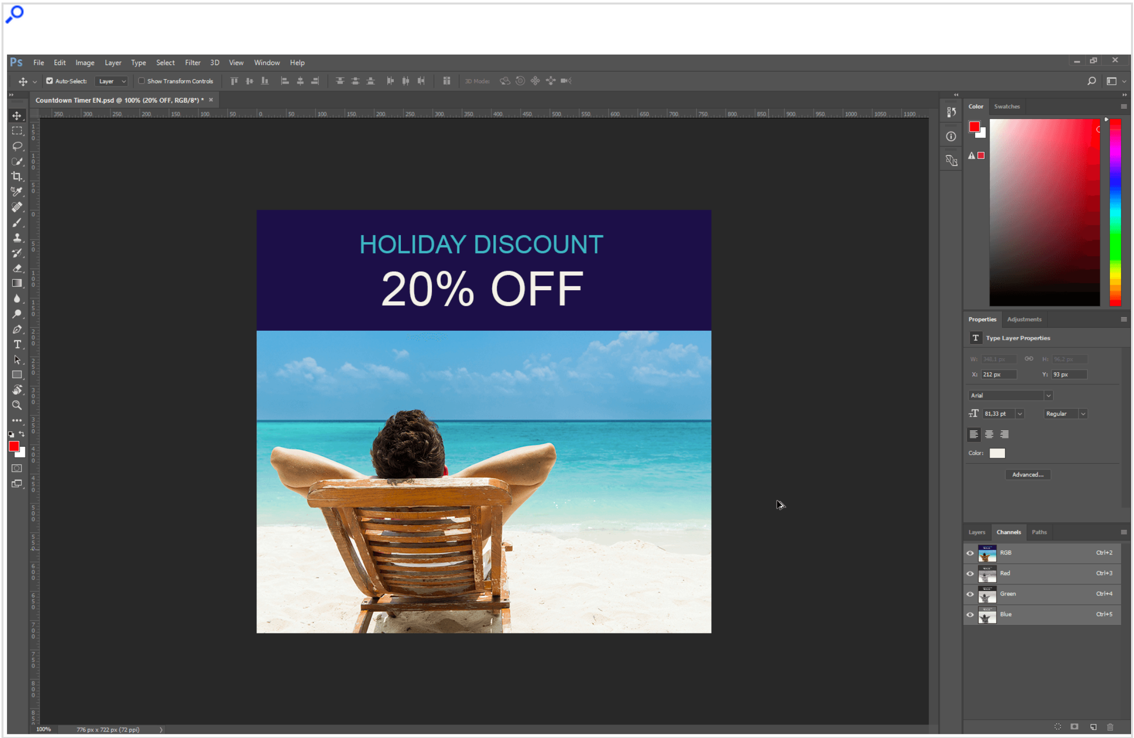
1. Open your product image or key visual with an image editing program.
2. Set the width of the product image or key visual between 100 and 800 pixels. In the example, the image width is 776 pixels.

   > **Note:** By default, the maximum width is limited to 800 pixels. If your message template or paragraph is limited to a smaller width, do not exceed it. The countdown timer is not scaled to the maximum value of your message template or paragraph.



3. Optional: Insert additional graphic elements into your image. A blue banner and a headline are inserted in the example.

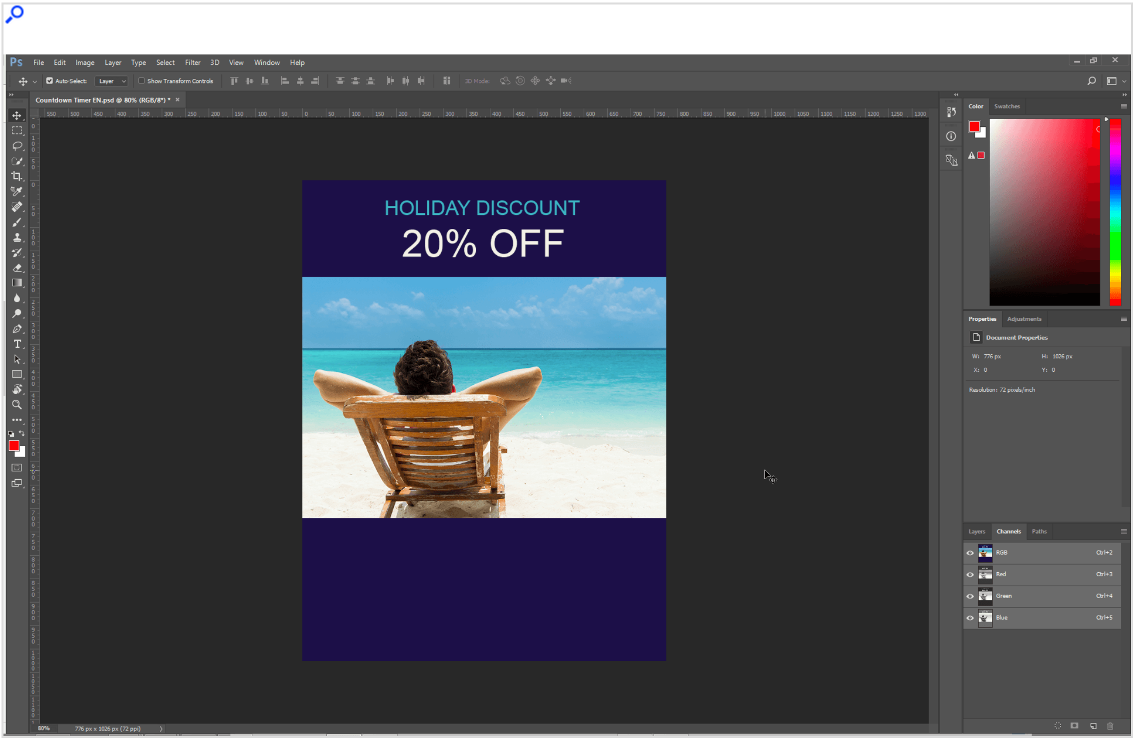
> **Note:** Do not use graphic elements with transparency, as they are displayed incorrectly.



4. Export the image as a JPEG or PNG.
5. Create the area for the countdown timer. For this area, start with a new graphic file or continue working with your finished product image/key visual using the file in your image editing program (not in the exported JPEG or PNG!). Later only export the countdown timer area.

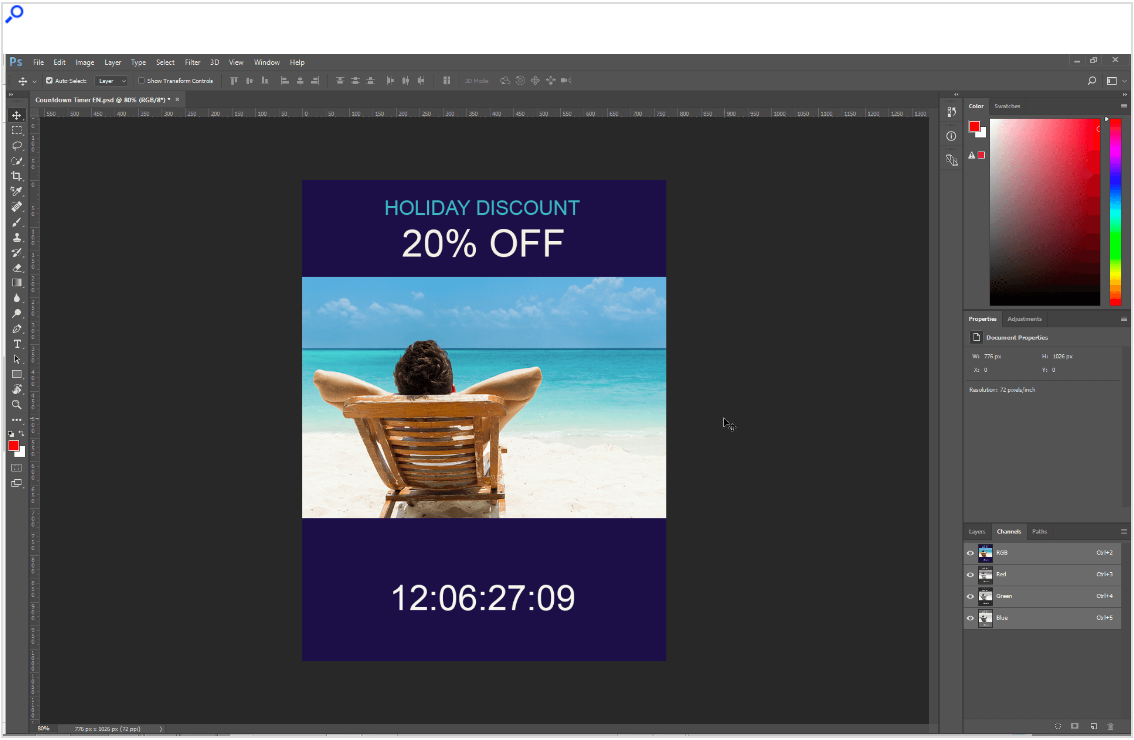
> **Note:** Do not use graphic elements with transparency, as they are displayed incorrectly.

> **Tip:** Continue to work on the product image/key visual file. This makes it easier to see the final result and how both parts will work together in your message.



> **Note: When creating an animated countdown timer**
>
> For the countdown timer area, avoid using complex graphic designs such as patterns, photo scenes, many colors and color gradients. This is because Optimizely Campaign will convert the JPEG or PNG into a GIF animation with 60 individual images. This GIF animation may not exceed 1.5 MB.
>
> Even if you use a highly compressed JPEG with a file size of a few KB that contains many colors, the subsequently generated GIF animation may exceed the maximum size of 1.5 MB.
>
> **When creating a static, non-animated countdown timer**
>
> The maximum file size for the countdown timer area is 500 KB.

6. To test the positioning of the countdown timer, which will come later, create a test timer with the testing tool for your image editing program. The example uses Arial font with the color white (#FFFFFF).



You can select among the following formats:

Static countdown timers

- Days, hours, minutes, seconds (dd:hh:mm:ss)
- Hours, minutes, seconds (hh:mm:ss)
- Days, hours, minutes (dd:hh:mm)
- Hours, minutes (hh:mm)
- Days only (dd)

Animated countdown timers

- Days, hours, minutes, seconds (dd:hh:mm:ss)
- Hours, minutes, seconds (hh:mm:ss)

You can use the following fonts/typefaces:

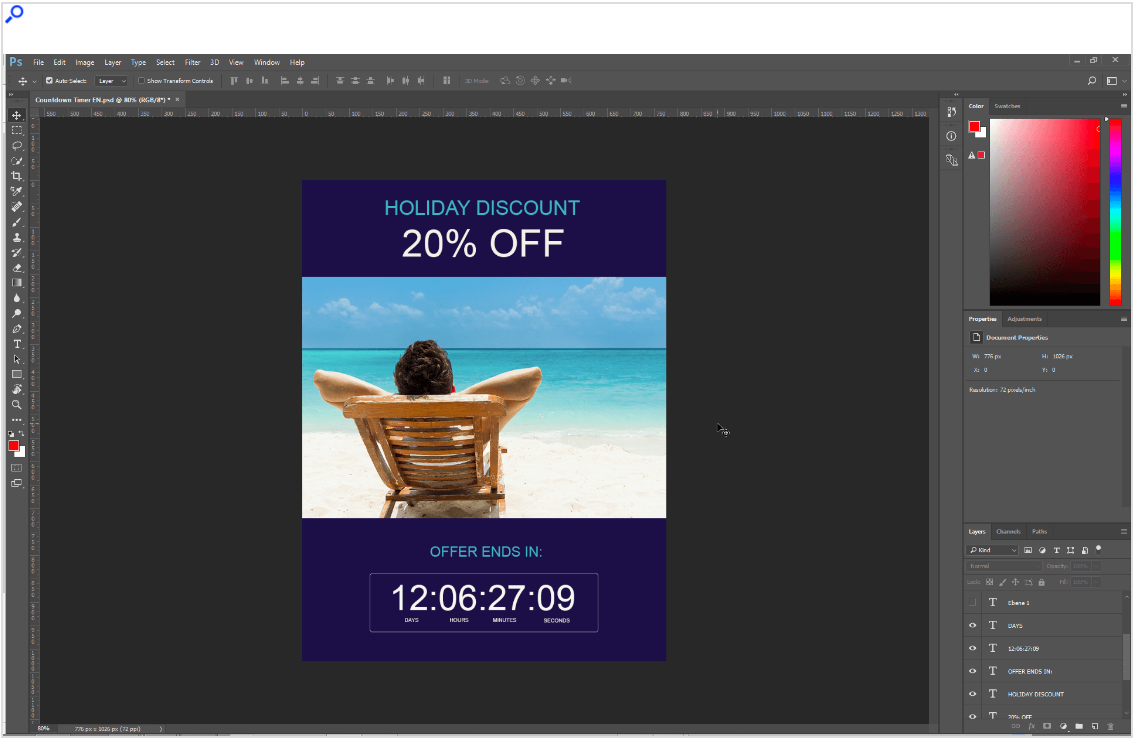
- Arial
- Arial bold

- Arial italics
- Arial black
- Arial Unicode MS
- Comic Sans MS
- Comic Sans MS bold
- Courier New
- Courier New bold
- Courier New italics
- Courier New bold and italics
- Times New Roman
- Times New Roman bold
- Times New Roman italics
- Times New Roman bold and italics
- Trebuchet MS
- Trebuchet MS bold
- Trebuchet MS italics
- Trebuchet MS bold and italics
- Verdana
- Verdana bold
- Verdana italics
- Verdana bold and italics

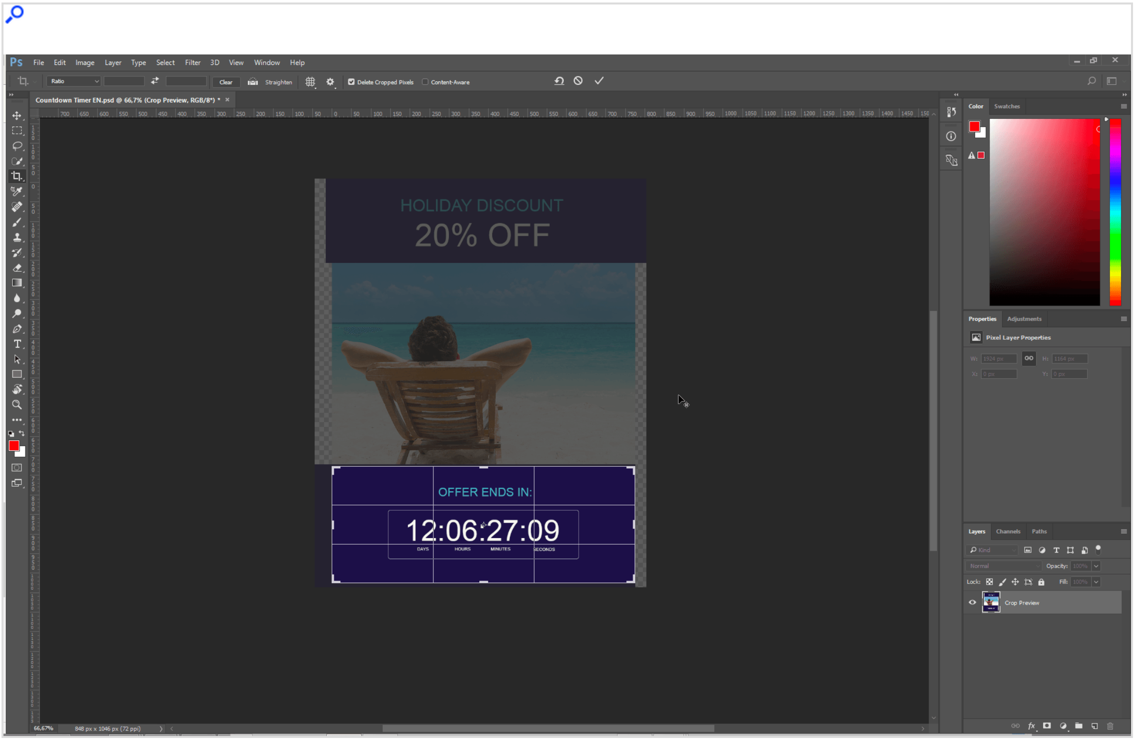
> **Tip:** Note the font and hexadecimal code for your font color. You will need this information later.

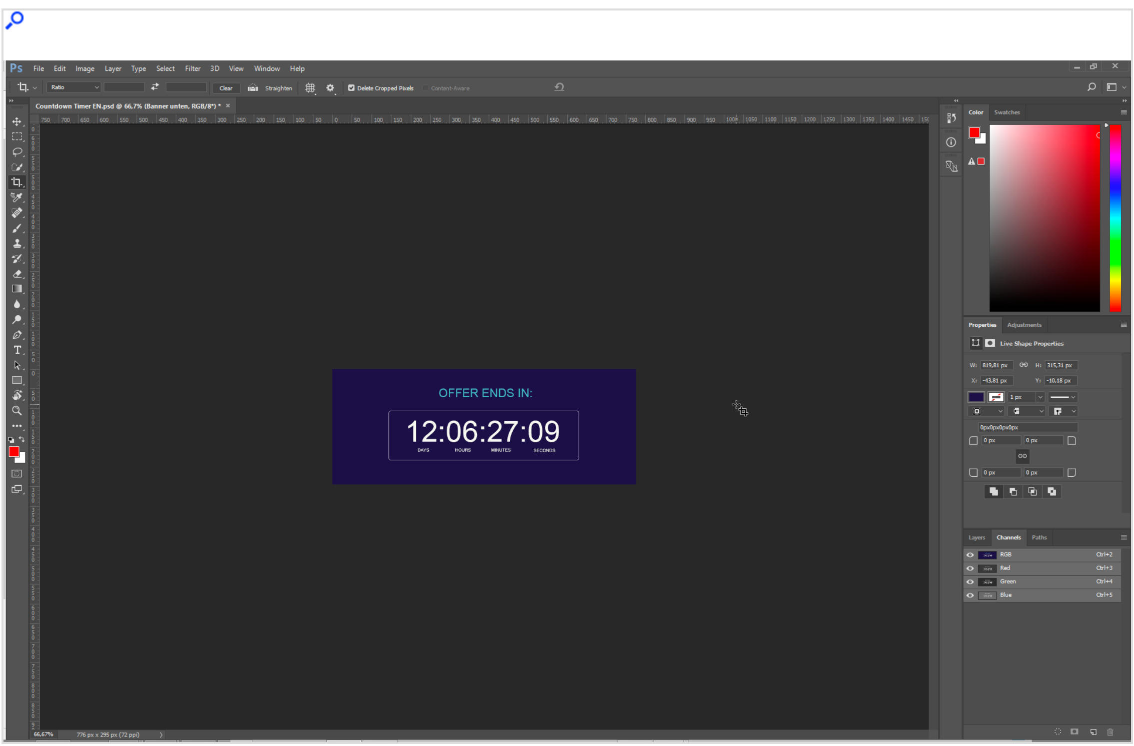
7. Optional: Insert additional graphic elements into your test timer. The example places a border around the timer, labels the timer with *days*, *minutes*, *hours* and *seconds*, and inserts the text *Offer ends in:*.

> **Note:** Do not use graphic elements with transparency, as they are displayed incorrectly.



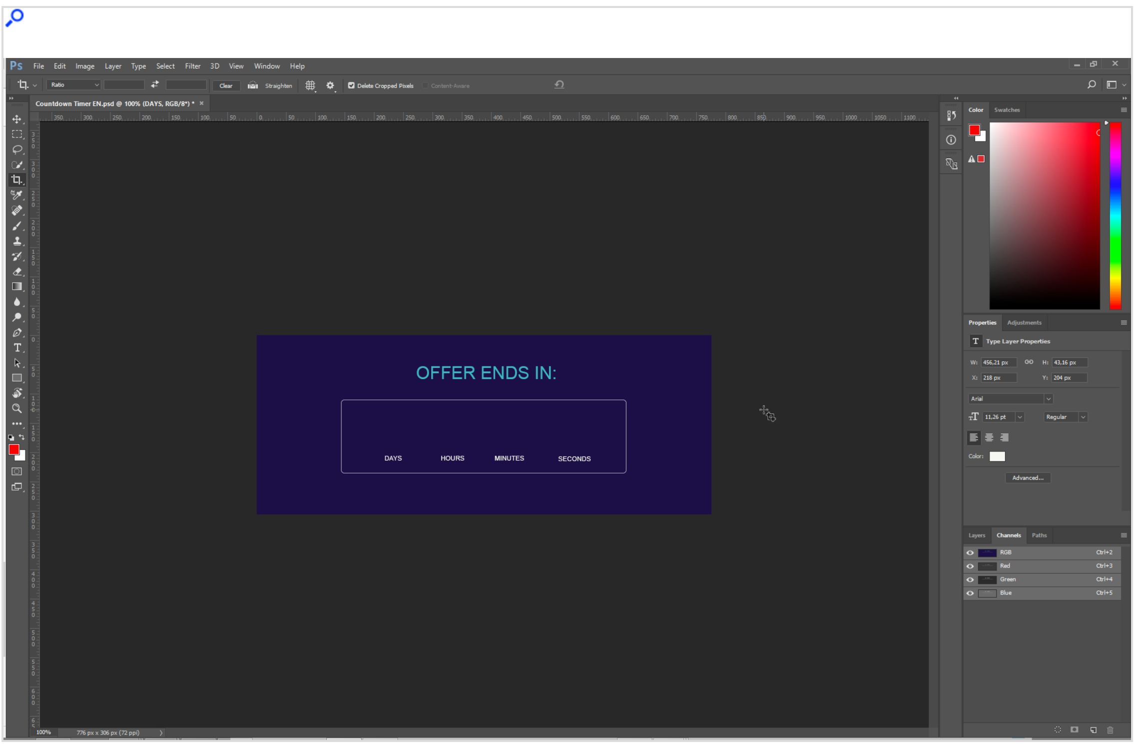
8. If you are satisfied with your layout, remove the key visual from your graphic so that the area for the countdown timer stands alone. You can do this in Adobe Photoshop, for example, using the crop tool. The example uses the crop tool to reduce the graphic to the area with the timer.


HOLIDAY DISCOUNT
20% OFF
OFFER ENDS IN:
12:06:27:09


OFFER ENDS IN:
12:06:27:09

9. Remove the test timer by deactivating or deleting the corresponding layer. If you inserted other graphic elements, leave them activated. The example deactivates the layer with the test timer in Adobe Photoshop. The border, the timer labels and the lines of text are still active.

> **Tip:** Insert the final timer later in Optimizely Campaign using the information you recorded regarding font and font color. The graphical representation of the area you created will later serve as the background for the final timer.

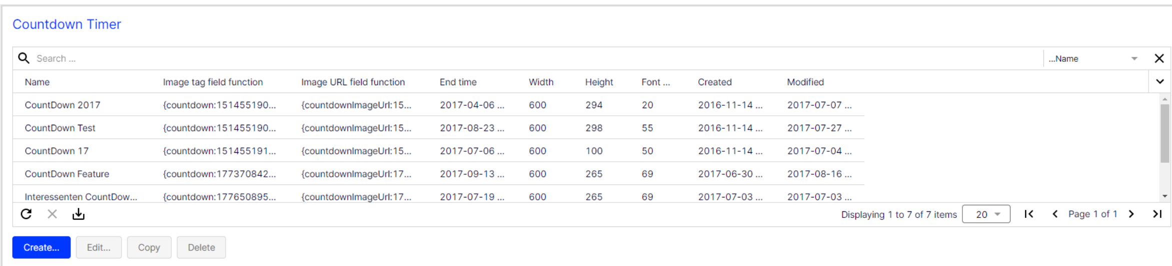


10. Export the area or background for the timer as a JPEG or PNG. Make sure that the file size does not exceed 20 KB (approximate value). When creating a static, non-animated countdown timer, the maximum file size is 500 KB.

    You have now prepared both parts of the countdown timer. Creating a countdown timer shows how to create the final timer in Optimizely Campaign and place it on your background graphic.

Creating and managing countdown timers

To create and manage countdown timers, open the Optimizely Campaign menu and select **More** > **Countdown Timer**.



Creating countdown timers

Prerequisite: Prepared background image, see Preparing graphics.

1. Click **Create...**. The **Create Countdown Timer** window opens.
2. You can make the following settings:
   - **Name**. Enter a name for your countdown timer.
   - **End Time**. Enter the date (left part of box) and the time (right part of box) at which your countdown timer will end.
   - **Format**. Select the timer format and if your timer is animated or non-animated. See How it works.
   - **Separator**. Enter the separator you want to use between the counter digits. By default, the colon (:) is used. You can use a string of up to 5 characters. If you do not want to use a separator between digits, enter a space.
   - **Background Color**. Select a background color for the timer by entering a hexadecimal value or using the color selection tool. If you prepared graphics for the countdown timer, you do not need to enter a background color. The timer is then automatically set to have no background color for your background image.
   - **Background Image for Running Countdown Timer**. Upload a prepared background image (in JPEG, PNG, BMP or GIF format, with height and width values between 100 and 800 pixels) by clicking **Upload** and selecting an image. If you followed Preparing graphics, upload the second part of your top offer into the area

you created for the timer. You will use the prepared product image/key visual later. Then, you will combine the product image/key visual and the finished countdown timer into a single graphic and insert it into your message (see Inserting a countdown timer into a message).

> **Note:** Make sure to follow the design guidelines for background images.

- **Background Image for Finished Countdown Timer**. To upload a background image (in JPEG, PNG, BMP or GIF format, with height and width values between 100 and 800 pixels) to be displayed in your messages when the countdown timer has run out. Click **Upload** and choose an image. If you do not, when the time runs out, the background image for running countdowns is displayed with digits set to zero.
- **Width (in Px)**. Enter the width of the timer background. If you uploaded a background image, its width is entered.
- **Height (in Px)**. Enter the height of the timer background. If you uploaded a background image, its width is entered.
- **Font**. Select the font and the font style for the digits of the timer. If you followed the example in Preparing graphics, enter the font you used for the test timer in your image editing program.
- **Font Size**. Enter the font size of the timer in pixels (px), at least 12 px. If you followed the example in Preparing graphics: enter the font size you used for the test timer in your image editing program.
- **Font Color**. Enter the font color for the timer as a hexadecimal code or use the color selection tool. If you followed the example in Preparing graphics, enter the font color you used for the test timer in your image editing program.
- **Left Text Margin (in Px)**. Enter the distance between the timer and the left edge of the image. Use the preview to review the desired placement of the timer.
- **Top Text Margin (in Px)**. Enter the distance between the timer and the upper edge of the image. Use the preview to review the desired placement of the timer.

3. Click **Save**.
4. Click **Close**. The **Countdown Timer** window opens. If you select a created countdown timer from the list, a preview of the countdown timer is shown.

Tip: When you create a countdown timer, two field functions are generated that you can insert into your message:

- **Image tag field function**. Default. Insert the image tag field function directly into the text.
- **Image URL field function**. Alternative, in case the image tag field function is not rendered correctly. Insert the image URL field function into the source code as follows: `<img src="{countdownImageUrl:0123456789}"/>`.

Managing countdown timers

In the **Countdown Timer** window, you can edit, copy and delete countdown timers.

Option	Action steps
Edit	1. Select a countdown timer and click **Edit...**. 2. Edit the countdown timer as described under Creating a countdown timer. 3. Click **Save**.
Copy	1. Select a countdown timer and click **Copy**. 2. Optional: Edit the countdown timer as described under Creating a countdown timer, and give it a new name. 3. Click **Save**.
Delete	**Warning:** Do not delete countdown timers that are in use in ongoing mailings. 1. Select a countdown timer and click **Delete**. 2. Click **Delete Countdown Timer**

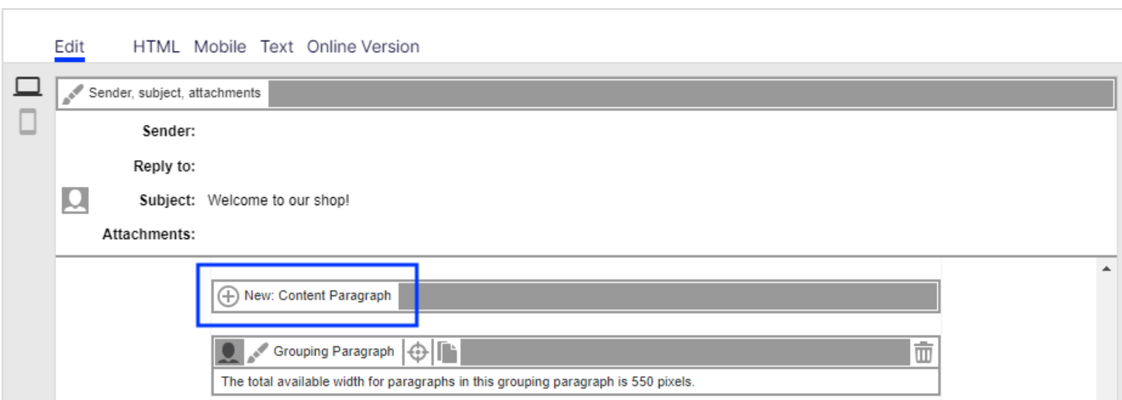
Inserting countdown timers into messages

You can insert a countdown timer into a message by itself, or combine it with a product image/key visual to make a single graphic.

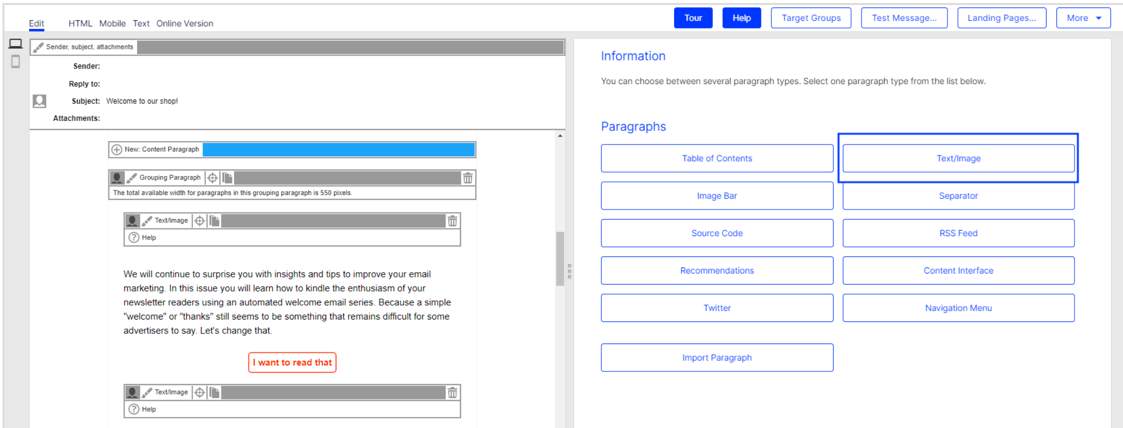
Inserting freestanding countdown timers

> **Tip:** The following instruction shows the procedure using the Template Kit. If you use a custom template, the steps may differ.

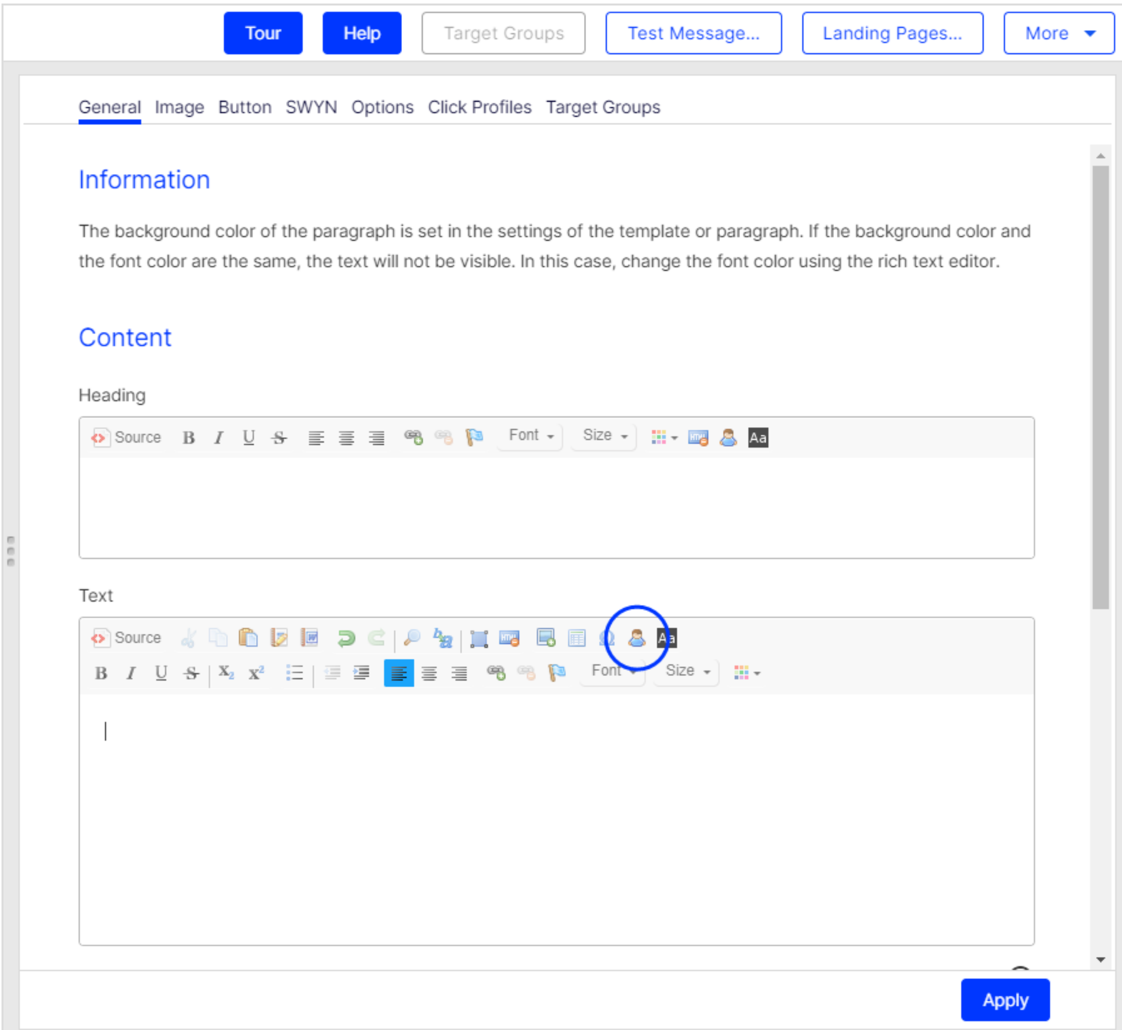
1. Select your message and click **Edit...**. The **Edit Content** window opens.
2. Click **New: Content Paragraph** to create a new content paragraph.



3. Click **Text/Image**.



4. Click **Insert field function** in the **Text** area.



5. Select the field function of the countdown timer you want to insert into your message. Click **OK**.

> **Note:** If you use an image URL field function, insert it into the source code as follows: `<img src="{count-downImageUrl:0123456789}"/>`.

6. Click **Apply**.

> **Tip:** The countdown timer does not show in real time in the preview. But, you can send a test message to yourself to preview the countdown timer before mailing the newsletter. To do so, click **Test message** in the upper right of the Template Kit.

Combining countdown timers with product images/key visuals

If you prepared graphics for the countdown timer (see Prepare graphics) and created the counter for the countdown timer (see Create a countdown timer), you can combine the product image/key visual and the countdown timer into a single graphic.

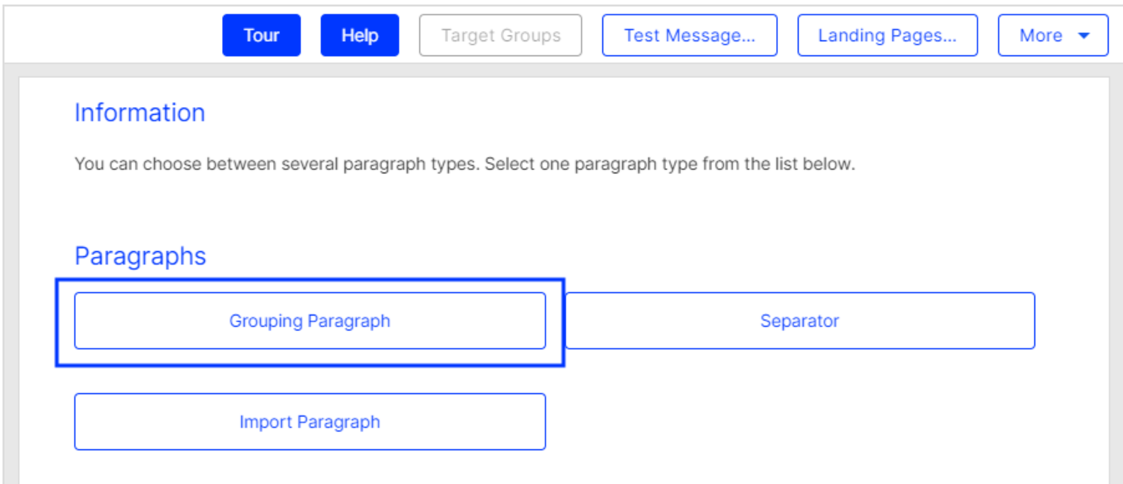
> **Tip:** The following instruction shows the procedure using the Template Kit. If you use a custom template, the steps may differ.

The basic procedure places the product image/key visual and the timer separately into two paragraphs positioned one above the other, with no spacing between. For the combining process, create a new grouping paragraph.

1. Select your message and click **Edit...**. The **Edit Content** window opens.
2. Click **New: Paragraph** to create a new grouping paragraph in your message.

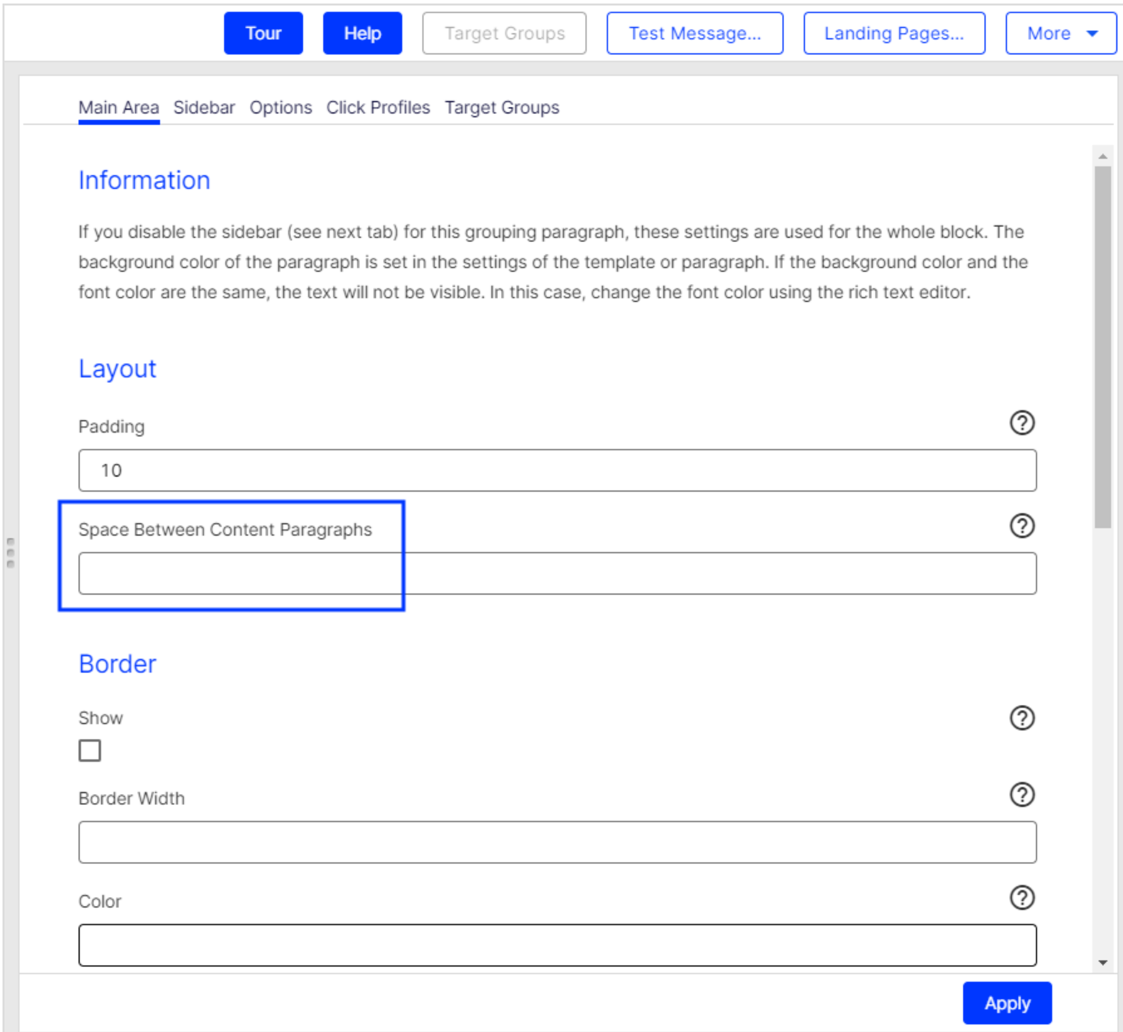
© Optimizely 2022

3. Click **Grouping Paragraph**.



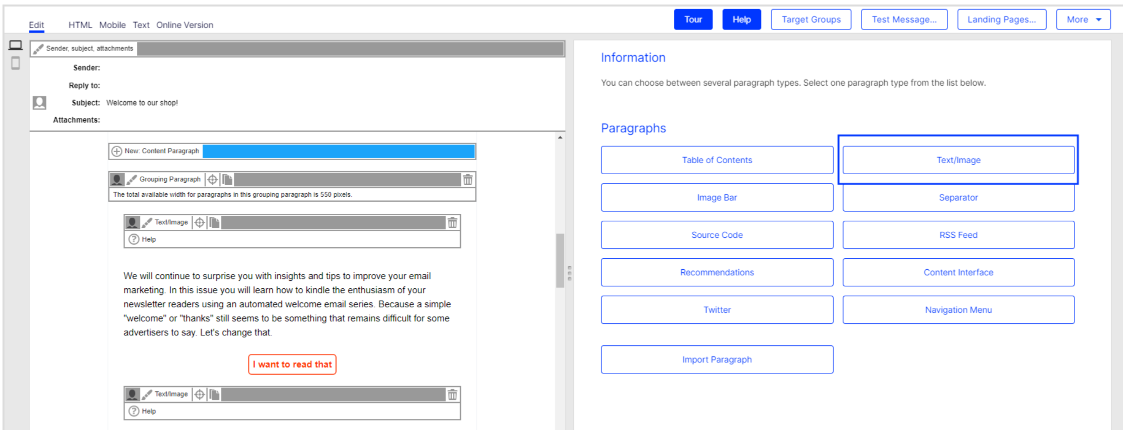
4. Enter `0` under **Layout**, in the **Space between content paragraphs** box.

> **Note:** If you forget to enter `0` here, in some cases, your product image/key visual and the countdown timer will not be seamlessly combined.

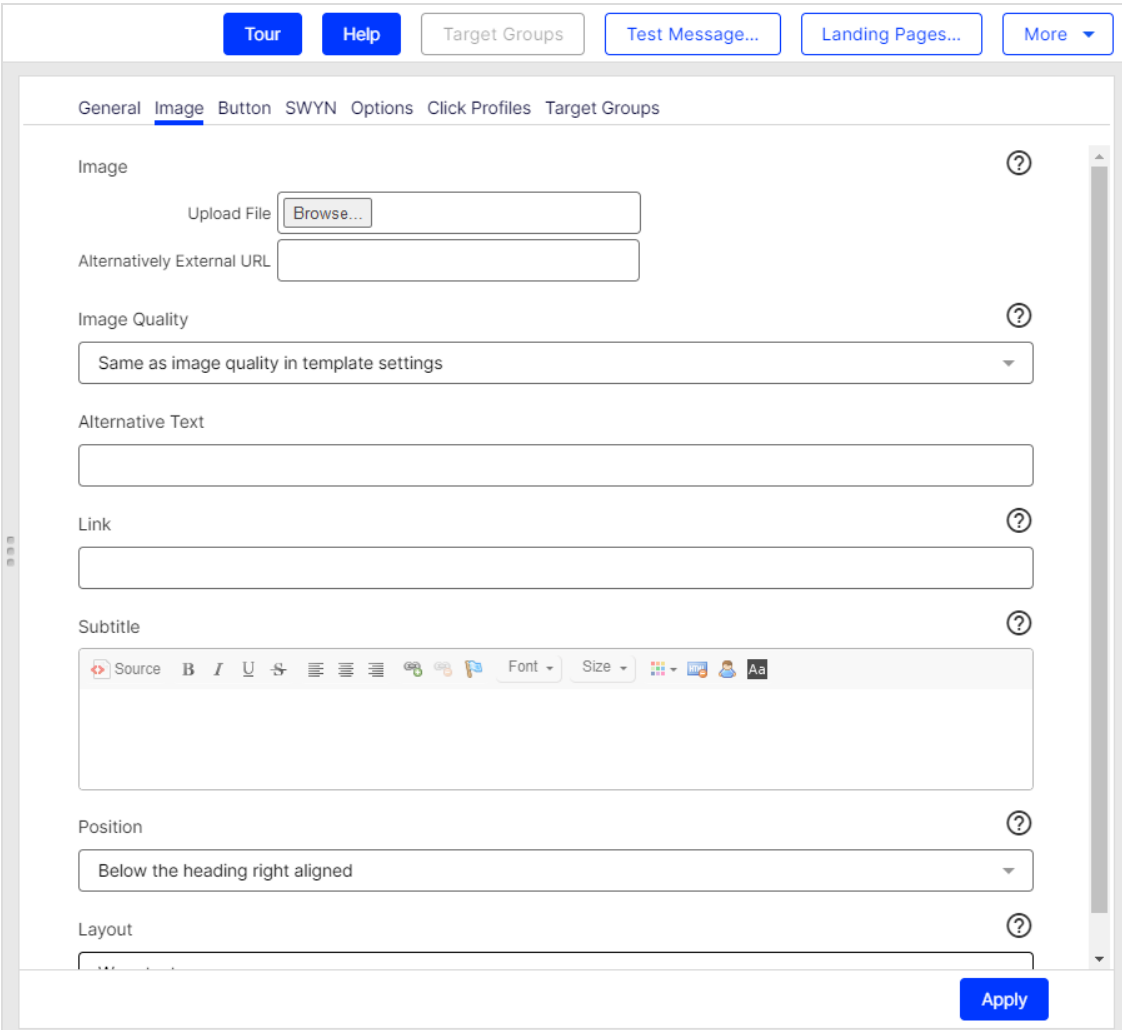


5. Click **Apply**.
6. To insert a new content paragraph for your product image/key visual into the grouping paragraph, click **New: Content Paragraph** on the left side of the preview, under the new grouping paragraph.

7. Click **Text/Image**.



8. Open the **Image** tab, click **Browse...** and select an image in the file browser to upload your product image/key visual. If your visual is saved externally, enter the URL.

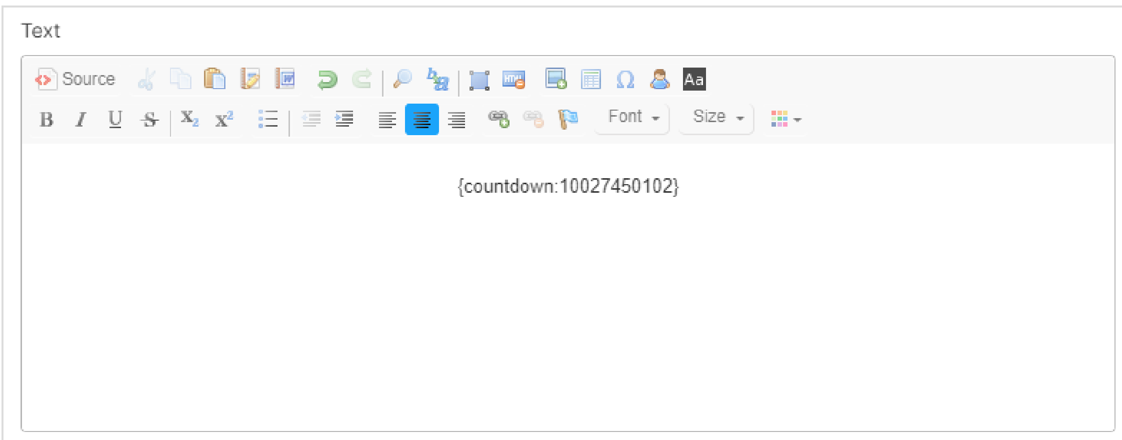


9. Center the product image/key visual by selecting one of the centering options from the list found under **Position**, for example **Centered below the link**.
10. Click **Apply**.
11. To insert another new content paragraph for the countdown timer into your grouping paragraph, click **New: Content Paragraph** on the left side of the preview. On the right, a window for selecting the paragraph type opens.
12. Click **Text/Image**.
13. Click **Insert field function** in the **Text** area. A window with a list opens. The list contains field functions that were saved in your client.

14. In the list, select the field function for the countdown timer that you want to insert into the content paragraphs and click **OK**.

> **Note:** If you use an image URL field function, insert it into the source code as follows: .

15. Click **Center** to center the inserted field function.



16. To save your changes, click **Apply**.

> **Tip:** The countdown timer does not show in real time in the preview, but you can send yourself a test message to check that the image merge is successful.

Troubleshooting

The following are common errors that can arise while working with the countdown timers.

> **Tip:** If the issue continues after you attempted the suggested solution, contact customer support.

Issue	Possible cause	Solution
In the message, the countdown timer is displayed wider than the product image, even though the original file for the countdown timer has the same width.	The global message width for your Optimizely Campaign template or your paragraph is smaller than the width of the countdown timer.	Make the global width of the message or the width of the paragraph the same as the width of the countdown timer, or reduce the countdown timer width.
A gap between the product image and the countdown timer.	A margin is defined for your content paragraphs.	Set the margin for your content paragraphs to `0`.
Animated countdown timers are not animated in Microsoft Outlook	Microsoft Outlook (version 2007 and above) does not support animated GIFs.	Open the mailing in Microsoft Outlook using the **View in browser** view.
The generated animated countdown timer exceeds 1.5 MB even though the uploaded background image is significantly smaller.	Optimizely Campaign generates an animated GIF with a total of 60 images from the single background image. The file size increases exponentially and exceeds the factor 60 because Optimizely Campaign adds the timer for the countdown timer to your background image.	Reduce the file size of your background image. The recommended maximum size is 20 KB. Also, avoid using complex graphic designs such as patterns, photo scenes, many colors, color gradients, and so on. Even if you use a highly compressed JPEG with a file size of a few KB, if it contains many colors, the subsequently generated GIF animation may exceed 1.5 MB.
The countdown timer is not animated.	A non-animated time format was selected in the countdown timer's settings.	Under **Countdown Timer**, select the affected countdown timer and click **Edit**. In the **Settings** area, in the **Format** drop-down list, select a time format that has the addition *(animated)* and click **Save**.
The image URL field function is not	The image URL field function was added directly	Insert the image URL field function into the source code as follows: `<img src="{count-`

Issue	Possible cause	Solution
replaced with the corresponding countdown timer.	to the mailing content, like the image tag field function.	`downImageUrl:0123456789}"/>`.

Click2Go

> **Note:** To enable this feature, contact customer support.

This topic describes the Click2Go feature that lets you create buttons for your mailings, with no HTML expertise, directly in Optimizely Campaign's content management system. Click2Go is integrated directly into the Optimizely Template Kit and can be used in any paragraph type.

Buttons are call-to-action elements with great potential for capturing attention and directing readers to landing pages for products, campaigns, profile pages, and so on.

> **Tip: Test your button's potential**
>
> To test how much attention a button captures in the context of a mailing, use the automated attention analyses from Optimizely Campaign. Attention analysis indicates whether a button's location captures a high level of attention and directs readers to desired content.

Activating Click2Go

When Click2Go is activated, content paragraphs display a new **Button** tab. Design the buttons as described below, and test them using a test email.

Inserting and designing buttons

To insert a button into a paragraph and edit it, perform the following steps:

1. Edit the paragraph in which you want to add a button.
2. Select the **Button** tab in the top tab bar. The following areas are displayed:
   - **Template**. In this area, you can insert two button templates into your mailing. The templates are provided along with the Click2Go function.
   - **Options**. In the tabs (described below), you can create a new button or edit an available template.
   - **Preview**. Shows the current design of your button in real time.

> **Tip:** When you are finished, test your buttons in a test email.

General

Parameter	Description
Text	Enter the button text.
URL	Insert a destination URL to which your button should link. **Note:** If you do not name a destination URL, the button will appear in your messages.
Alignment	Set the position of your button in relation to other content elements of your mail-ing.

Text

Parameter	Description
Font type	Select the text font.
Color	To define the color of your button border, click the displayed value then set the desired color in the selection window.

Parameter	Description
Size	To set your text size, adjust the value manually or via the slider.
Bold	To make your text bold, select the check box.
Italic	To make your text italic, select the check box.
Underline	To make your text underlined, select the check box.

Background

Parameter	Description
Color	To select your button's background color, click the displayed value then select the color in the selection window.
Image	To select a background image for the button, click **Browse...** and select the image from your computer. Alternatively, use the **Alternatively external URL** box. Background images may not be displayed, depending on the email software and the recipient's security settings. **Note:** If you select a background image, specify an additional background color as a fallback, in case the background image is not displayed.
Alignment	Set the position of your background in relation to the other content elements.
Repeat	Select an uploaded image to be repeated in various arrangements.

Symbol

Parameter	Description
Image	To select a symbol for your button, click **Browse...** and select the image from your computer. Alternatively, use the **Alternatively external URL** box. Background images may not be displayed, depending on the email software and the recipient's security settings.
Position	Specify the position of the symbol in the foreground of your button.
Margin left	Set spacing for your border's left side of by adjusting the value manually or using the slider.
Margin right	Set spacing for the border's right side by adjusting the value manually or using the slider.

Padding

Parameter	Description
Top	Internal spacing (padding) indicates how much spacing is between the text and the outer edge of the button. Change this value to change the size and visual appearance of the button. You can individually define the internal spacing for each side.
Bottom	
Left	
Right	

Border

Parameter	Description
Width	To set the width of your border, adjust the value manually or use the slider.
Color	To select the color of the button border, click the displayed value then set the desired color in the selection window.
Radius	Define the shape of your button. A higher value produces rounder corners.

Easy Copy

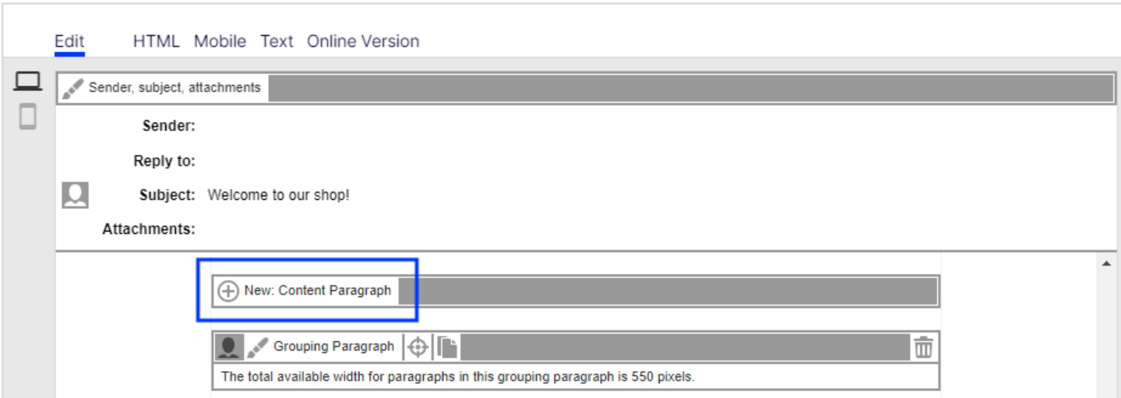
> **Note:** To enable this feature, contact customer support.

This topic describes the Easy Copy feature. When creating messages, you can apply individual paragraphs (including text and images) from other messages – from any client. You can edit the imported content and adapt it to the new message.

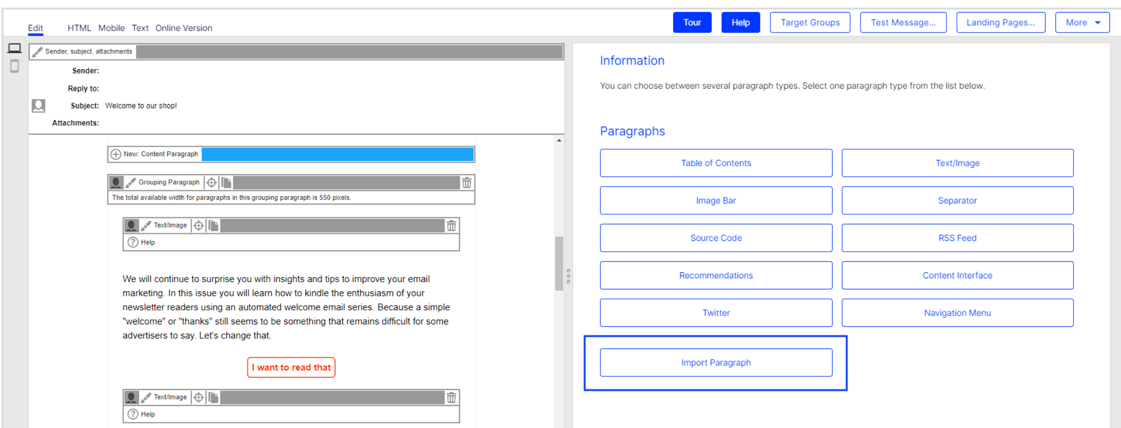
> **Note:** The source message and the target message must have the same paragraph structure. The source paragraph must be at the same structural level as the target paragraph.

To copy content from other messages to a new message, perform the following steps while in the edit mode of the Template Kit.

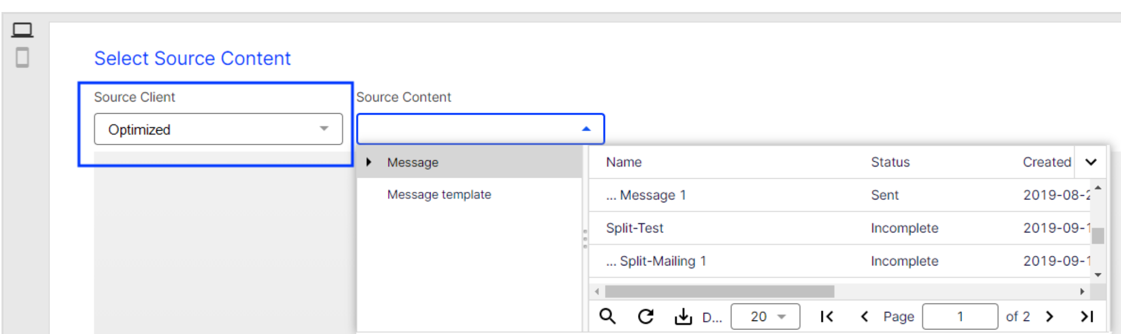
1. To the left of the message preview area, click **New: Content Paragraph**. The right edit window shows a selection of paragraph types.



2. Click **Import Paragraph**. A new window opens. You are asked to select the source content.



3. In the **Source Client** drop-down list, select the client that contains the message or message template that you want to import.



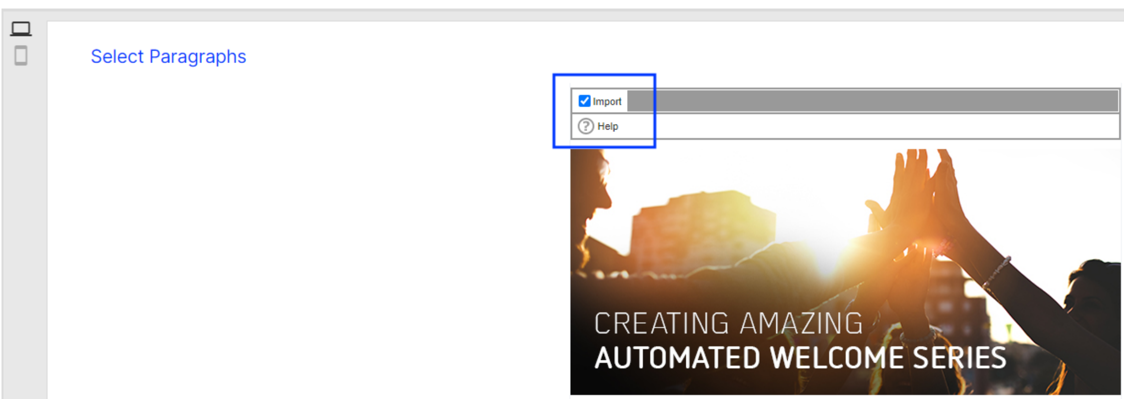
4. In the **Source Content** drop-down list, select the message or message template which contains the content you want to import.

> **Tip:** If you are unsure of which message or message template contains the content, click a message or message template in the overview list to preview its content.

5. Select the message or message template containing the content you want to import.

> **Tip:** To import content from several messages or message templates, repeat steps 1 to 8 after you complete an import from a message.

6. Click **Next**. The **Select paragraphs** window opens.
7. Select the content you want to import by checking the relevant check box.



8. Click **Import Paragraphs**. You can now edit the content.

Mobile Fusion

> **Note:** To enable this feature, contact customer support.

The Mobile Fusion feature makes your newsletter templates fit for mobile devices, such as smart phones and tablets. From a usability perspective, smart phones and tablet PCs are quite different from a traditional computer. Their display sizes are significantly smaller, depending on the type of device. So, the available space should be used optimally.

Scrolling should be limited to vertical, not horizontal. To increase usability, images should be displayed as large as possible, that is "fit-to-screen". Avoid a floating layout or columns. Finally, the newsletter should support the optional switch from portrait to landscape mode by rotating the device.

Checklist for a mobile version of your newsletter

- Layout's minimum width is 320 pixels
- Additional layout for a maximum width of 480 pixels recommended
- Adaption of the layout to full-screen mode
- Images displayed at optimal size
- Single-column layout preferred
- Automatic detection of display width used to adapt the newsletter layout

Adapting your template

You can adapt any message template to a mobile layout. Optimizely offers a full-service adaptation, where you get everything "from scratch". Or, send Optimizely your mobile lay-out and let us implement it into your template.

Full-service adaptation

1. You indicate the template you want to adapt for a mobile version.
2. Optimizely creates a layout with flexible widths (two widths, flexible display according to display size) **or** another layout using fixed width.
3. You choose a layout.
4. Optimizely implements it into the template.

Benefits

- You get everything from one source and benefit from Optimizely's experience in template design.
- You can be confident that Optimizely's layouts work in your template.

Implementing your own layout

1. You indicate the template for which you want to implement a mobile version.
2. Optimizely checks if the indicated template is suitable for flexible width or fixed width mobile layout.
3. You provide a layout with flexible **or** a fixed width.
4. Optimizely implements the layout into the template.

> **Note:** The mobile layout's e Elements must follow the same order and structure as the HTML layout. For example, you cannot change the position of an image above text to a position within text.

Flexible vs. fixed-width

Ideally, mobile layouts are implemented with a flexible width that adapts to the display size ("fit-to-screen"). The best way to achieve this is a flexible layout using two widths. Any width in between the two is scaled to fit automatically, so the available display space is used optimally. At a defined width between the two defined values, the layout switches from one to the other. Displays with a higher resolution use the regular HTML layout.

© Optimizely 2022

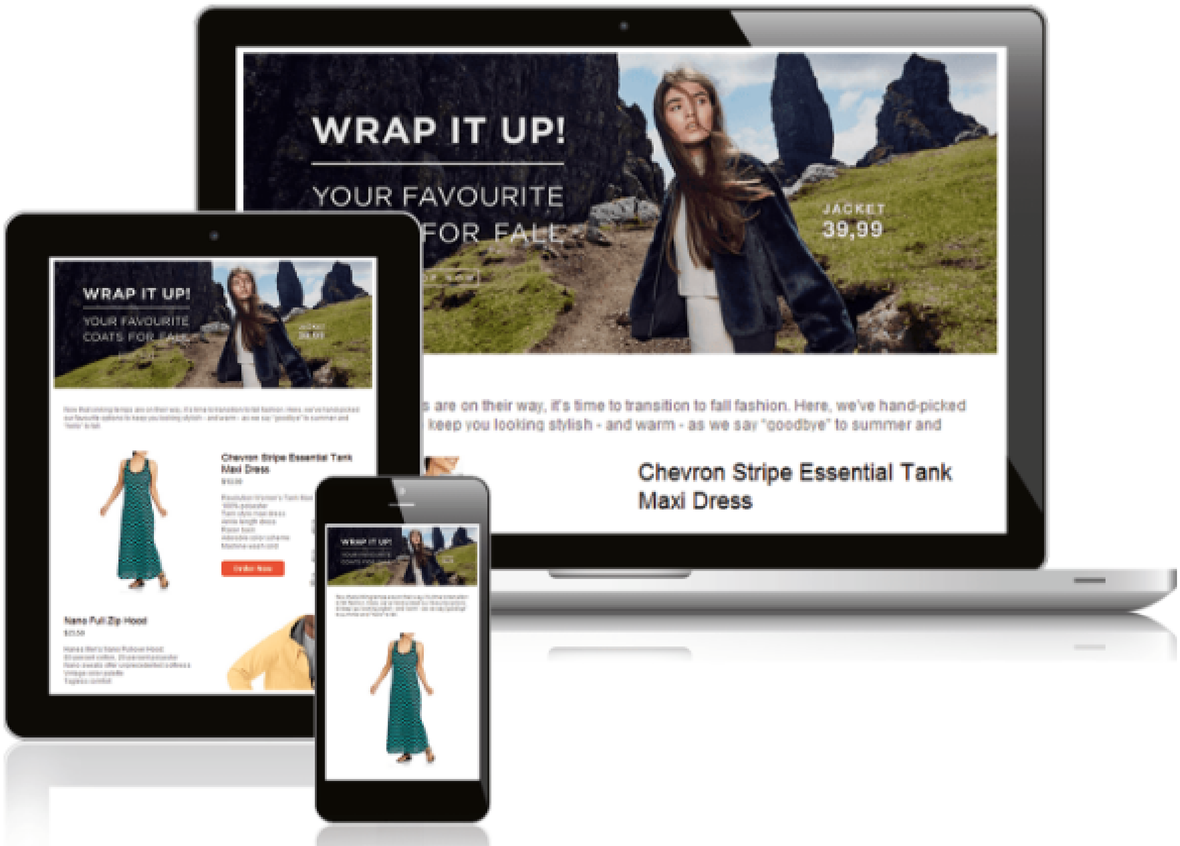
Note: For complex template layouts, such as where text is rendered into an image, a flexible width layout **cannot** be implemented. Optimizely offers a fixed layout width for your mobile version.

Layout	Width
Flexible width	320 / 480 px
Fixed width	320 px

Tip: The values in the table are default values. If you want different values, contact customer support.

Optimizing newsletters for mobile devices

The Optimizely Template Kit is optionally available with Mobile Fusion, which applies the Template Kit's flexibility to the mobile version of your newsletters. This section helps you design mobile newsletters and integrate them into the mobile version of your mailings.



Prerequisites

- If you have not installed Mobile Fusion or are not currently using the Template Kit, contact customer support to get Mobile Fusion with the Template kit.
- Template Kit describes paragraphs, setup and configuration of the Template Kit, including mobile options.
- Mobile Fusion describes design options for the mobile layout of newsletters.

What does the Template Kit with Mobile Fusion offer?

- **Enable or disable mobile version**. If you enable the mobile version, Optimizely Campaign automatically generates a version of your mailing optimized for mobile devices; this increases the size of each emailing. See General settings.

- **Place the sidebar above/below the main body**. In each paragraph, you can indicate whether to display the sidebar (if present) before or after the main body. See Grouping paragraphs.
- **Hide/display paragraphs in the mobile version**. You can indicate, by paragraph, whether to integrate that paragraph into the mobile version. You can also indicate if a paragraph should appear in the mobile version only. See Content paragraphs.
- **Set paragraph width in the mobile version**. You can set the width of each paragraph (in %) for mobile display. See Content paragraphs.
- **Set the width of paragraph separation in the mobile version**. You can set the width of the paragraph separators (in %) in the general settings for the template. See General settings.

Creating mobile versions

1. Create a click profile for the mobile version.

   You can also specify a click profile for the mobile version to later evaluate how many recipients clicked it. Create a click profile and select this profile by accessing the **Mobile** tab of the template's general settings > **Click profile** drop-down list.

   > **Tip: Landing pages**
   >
   > Mobile Fusion also automatically creates mobile versions of landing pages and SWYN pages. The mobile versions of landing pages can also be adapted using the settings described here.

2. Create the desktop version first.

   Before creating a mobile version of a mail, create the desktop version. The default settings for Mobile Fusion were selected for the template kit so that content paragraphs are automatically copied to the mobile version. The sidebar is displayed beneath the main content area; the table of contents is hidden. You can change default settings later.

3. Hide content that should not appear in the mobile version.

   You can enable individual paragraphs for the mobile version. By default, this option is already active for paragraphs, except for the table of contents. To make your mobile newsletter more compact, remove selected paragraphs from the mobile version by removing the **Show in mobile version** check mark.

   > **Note:** Do not hide main elements such as the header, footer or editorial, to ensure that the mobile newsletter remains complete.

4. Create alternative paragraphs for the mobile version.

   Some content paragraphs may not display correctly or as desired in the mobile version, because the images look awkward or the paragraph has too much text. To add these paragraphs to the mobile version, create two variants—one for desktop viewing and one for mobile viewing. Deactivate the unused view in the settings of both paragraphs.

   > **Note:** Only use this option if adjustments to the mobile layout did not result in desired effect. Also, make sure that only one paragraph version appears in the newsletter.

5. Add paragraphs to be displayed in the mobile version only.

   To send information only to recipients with mobile devices, add a paragraph at the corresponding position and hide this paragraph in the desktop version by clearing the **Show in desktop version** check box.

   > **Note:** Do not hide important content in the desktop version.

6. Position the sidebar.

   In the mobile version, the sidebar of a structuring paragraph is displayed above or beneath the main content area for display purposes. This causes the arrangement of elements to shift.

   If you insert a table of contents or the newest messages into the sidebar, display the sidebar above the main area or to hide the table of contents in the mobile version. Test to see whether the content of the mobile version is displayed in the correct order.

© Optimizely 2022

When using multiple structuring paragraphs in a single mail, you can configure this setting separately for every structuring paragraph.

7. Adjust the paragraph width for the mobile version.

   You can create a multi-column layout by specifying a percentage width for content paragraphs in the mobile version. This setting only takes effect if you adjust the width in two consecutive paragraphs so that you get 100% width. You can use this option to force an image to be displayed next to a specific text.

   Use a paragraph with an image and another paragraph with a text for this purpose. Then, specify 30% width for the image paragraph and 70% width for the text paragraph. Only use this option for short texts and simple images or graphics, as multi-column layouts reduce the visual quality and readability for mobile viewers.

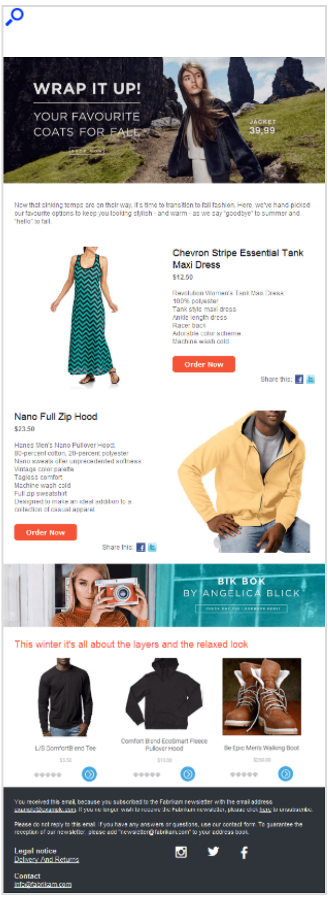
Tips for optimizing the mobile version

- **Optimize the general settings of the template**. You can select spacings, borders, colors and other configurations. Most settings, except the newsletter's width and outer edge, are copied to the mobile version. You can also change the appearance of the mobile version using these settings.
- **Test the newsletter using Outlook**. The HTML and mobile preview shows a simulated view of the mail in email programs and on mobile devices. The actual view varies depending on software and hardware. Views provided by Microsoft Outlook 2007 or 2010 are a good indicator for the correct display of the newsletter. If Outlook displays correctly without errors, it is likely that other programs and web mailers also display the mail as intended.
- **Change to the mobile view in editing mode**. You can change between the desktop and mobile view by making the editing window in Optimizely Campaign smaller and decreasing the width using the cursor. When the window width is less than 600 pixels, the view changes to the mobile view.
- The mobile version may not display uniformly in all email applications and can deviate from the preview layout or the testing emails.

Tips and examples

Desktop version

The desktop version of this newsletter is the basis for the mobile version. If the mobile version is activated, paragraphs are copied into the mobile version by default.



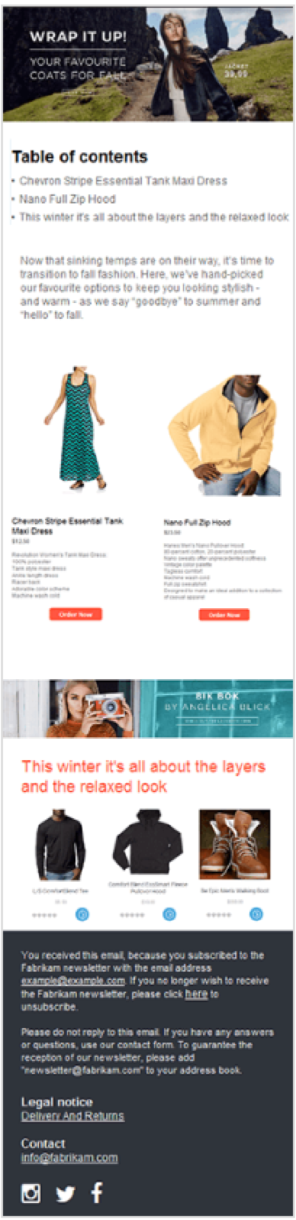
Mobile version 1

This mobile version is created from the desktop version with minor adjustments.


WRAP IT UP!
YOUR FAVOURITE COATS FOR FALL
Now that sinking temps are on their way, it's time to transition to fall fashion. Here, we've hand-picked our favourite options to keep you looking stylish - and warm - as we say "goodbye" to summer and "hello" to fall.
Chevron Stripe Essential Tank Maxi Dress
$12.50
Revolution Women's Tank Maxi Dress:
100% polyester
Tank style maxi dress
Ankle length dress
Racer back
Adorable color scheme
Machine wash cold
Order Now
Nano Full Zip Hood
$23.50
Hanes Men's Nano Pullover Hood:
80-percent cotton, 20-percent polyester
Nano sweats offer unprecedented softness
Vintage color palette
Tagless comfort
Machine wash cold
Full zip sweatshirt
Designed to make an ideal addition to a collection of casual apparel
Order Now
This winter it's all about the layers and the relaxed look
You received this email, because you subscribed to the Fabrikam newsletter with the email address example@example.com. If you no longer wish to receive the Fabrikam newsletter, please click here to unsubscribe.
Please do not reply to this email. If you have any answers or questions, use our contact form. To guarantee the reception of our newsletter, please add "newsletter@fabrikam.com" to your address book.
Legal notice
Delivery And Returns
Contact
info@fabrikam.com

Mobile version 2

In this adjusted mobile version, a table of contents is displayed. The two small paragraphs after the editorial were positioned next to each other, both with a width of 50%.

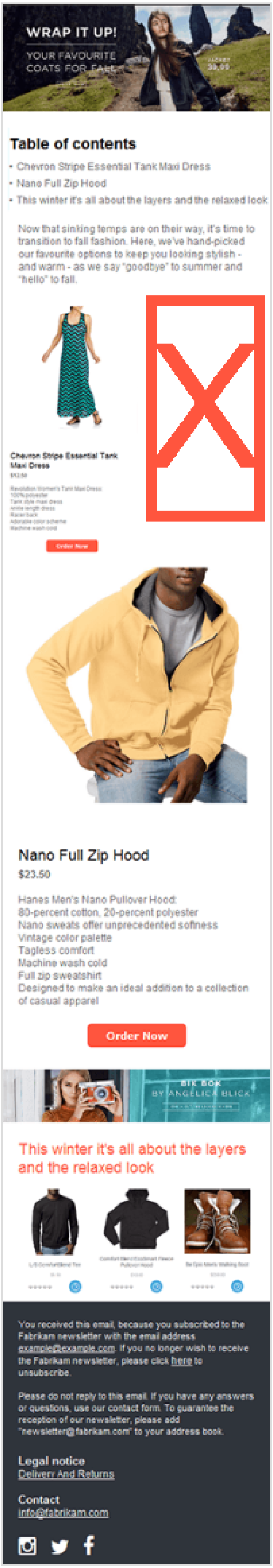


Mobile version with errors

This mobile version contains common errors. You should check the mobile view of your newsletter and, if possible, test it using mobile devices to avoid such mistakes.

The width of this paragraph is set to 50%. But the width of the following paragraph was unchanged. So, the first paragraph only occupies half of the available width and creates a gap. For both paragraphs to be adjacent, adjust the width of the following paragraph so that both add up to 100%.

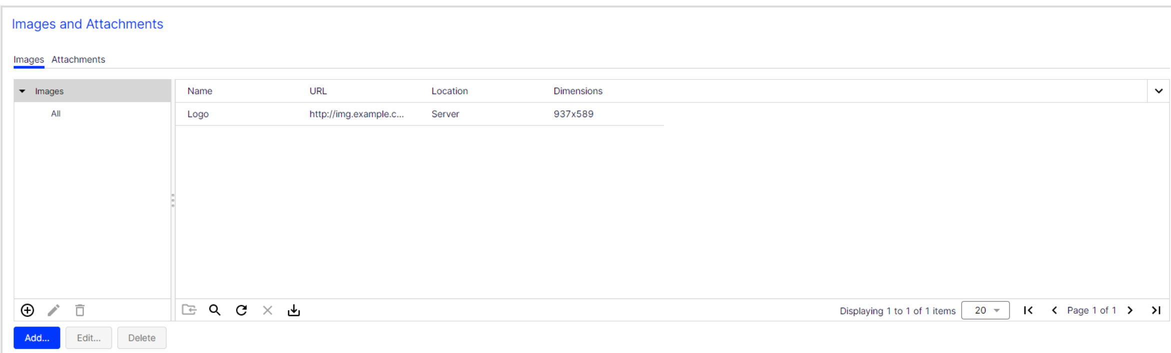
© Optimizely 2022


WRAP IT UP!
YOUR FAVOURITE COATS FOR FALL
Table of contents
• Chevron Stripe Essential Tank Maxi Dress
• Nano Full Zip Hood
• This winter it's all about the layers and the relaxed look
Now that sinking temps are on their way, it's time to transition to fall fashion. Here, we've hand-picked our favourite options to keep you looking stylish - and warm - as we say "goodbye" to summer and "hello" to fall.
Chevron Stripe Essential Tank Maxi Dress
Nano Full Zip Hood
$23.50
Hanes Men's Nano Pullover Hood:
80-percent cotton, 20-percent polyester
Nano sweats offer unprecedented softness
Vintage color palette
Tagless comfort
Machine wash cold
Full zip sweatshirt
Designed to make an ideal addition to a collection of casual apparel
Order Now
This winter it's all about the layers and the relaxed look
You received this email, because you subscribed to the Fabrikam newsletter with the email address example@example.com. If you no longer wish to receive the Fabrikam newsletter, please click here to unsubscribe.
Please do not reply to this email. If you have any answers or questions, use our contact form. To guarantee the reception of our newsletter, please add "newsletter@fabrikam.com" to your address book.
Legal notice
Delivery And Returns
Contact
info@fabrikam.com

Images and attachments

The **Images and Attachments** feature provides an overview of attachments and images saved in the Optimizely Campaign content database, and also lets you edit those files.

To access the overview, open the Optimizely Campaign menu and select **Campaigns** > **Images and Attachments**.



You can perform the following actions:

- **Add**

  See **Adding images** and **Adding attachments**.

- **Edit**

  1. In the overview, click an image or attachment.
  2. Click **Edit...**. The **Edit Image/Edit Attachment** window opens.
  3. Enter a new file name for the image or a new file name and a description for the attachment.

     > **Tip:** The name you apply to the file should match the original file, so as not to confuse the mailing recipient.

> **Note:** Do not use uppercase, spaces, umlauts, or special characters, and add the file extension. Otherwise, the attachment does not load correctly. Example: *flowers_for_you.pdf.*

4. If you want to change the file, that is, use another file (by uploading a new file or specifying another URL), click **Previous** and make the change.
5. Click **Save**.

- **Delete**
  1. In the overview, click an image or attachment.
  2. Click **Delete**.
- **Clear selection**

  Click **Clear selection** ✕ to deselect the image or attachment.

Categories

Click the **Images** tab to display images, or the **Attachments** tab to display attachments.

Images

The **Images** overview displays the following information:

- **Name**. The file name.
- **URL**. Where the image is stored. If it is physically uploaded to Optimizely Campaign, the URL is an internal URL (http.//img.example.com/...). If you selected **External URL**, the file's original URL is shown.
- **Location**. Indicates whether the image is stored on Optimizely Campaign (server) or located externally.
- **Dimensions**. The image's dimensions in pixels.

> **Tip:** Select an image in the overview to display an image preview.

Attachments

The **Attachments** overview displays the following information:

- **Description**. The attachment description.
- **File Name**. The file name.
- **URL**. If you selected **External URL** while importing the attachment, the file address appears. If the file was physically imported into Optimizely Campaign, this field is empty.
- **Location**. Indicates if the file is stored on the Optimizely Campaign (server) or located externally.
- **Type**. The file format (PDF, DOC and so on). This is the original file format as recognized by Optimizely Campaign when the file was added, not the format you applied while naming it.

  > **Tip:** The type you apply to the file should match the original file, so as not to confuse the mailing recipient.

- **Size**. The file size in bytes. Use discretion with the file size, so recipients are not annoyed by large attachments.

Adding images

To add images and use them later as mailing attachment in Optimizely Campaign, do the following:

> **Note:** The image's file format must be .gif, .jpg, .jpeg or .png.

1. Open the Optimizely Campaign menu and select **Campaigns** > **Images and Attachments**.
2. Open the **Images** tab and click **Add...**.
3. Select one of the following options:
   - **Upload**. Click **Browse...** and select a file from your computer. The image is still available even if your local version no longer exists.

- **External URL**. In the **URL** text field, enter the web address where the file can be found, beginning with `http://`. The image is not physically imported into Optimizely Campaign. Mailings include only a link to the image.

4. In the **File Name** text field, enter a name that helps you recognize the image when creating a mailing or in the content overview.
5. Click **Save**.

Adding attachments

To import files into Optimizely Campaign and use them later as mailing attachment, do the following:

1. Open the Optimizely Campaign menu and select **Campaigns** > **Images and Attachments**.
2. Open the **Attachments** tab and click **Add...**.
3. Select one of the following options:
   - **Upload**. Click **Browse...** and select the desired file from your computer. The file is available even if your local version no longer exists.
   - **External URL**. In the **URL** text field, enter the web address where the file can be found, beginning with `http://`. The file is not physically imported into Optimizely Campaign. Mailings include only a link to the file.
4. In the **File Name** text field, enter a name that helps you recognize the file when creating a mailing or in the content overview. Maintain the file extension (.pdf or .doc) so recipients recognize the file type.
5. In the **Description** text field, enter a file description.

   > **Tip:** The description is used internally and is not part of the mailing.

6. Click **Save**.

Sending personalized attachments

The **Personalized attachments** feature lets you include attachments to particular recipients when sending transactional mails. For example, you can send invoices or order confirmations.

Before sending, transmit the attachments to Optimizely Campaign via HTTP API.

Prefix or suffix subject line

> **Note:** To enable this feature, contact customer support.

This additional feature automatically adds a prefix or suffix to the subject line of any mailing. For instance, the suffix "TEST" may be added to each test email subject line.

Uploading files

> **Note:** To enable this feature, contact customer support.

Upload a file (such as a CSV file) manually into your Optimizely Campaign client. This is helpful if you do not upload files regularly and automatically, for example price catalogs.

The uploaded file can contain any content and is processed internally according to the file name and the processes and jobs associated with this file name. For example, upload product data if you use a content interface and update product details manually.

Publish mailings

> **Note:** To enable this feature, contact customer support.

This feature lets you publish a mailing or parts of a mailing into another client or template. It is a useful tool for reusing content from an existing mailing in another context or client.

Video emails

Incorporating videos into a mailing is a great way to get the recipient's attention and surprise them with your creativity. Videos are better than both text and still images at showing a recipient what he wants to know, in very little time and without requiring a word. Videos convey the value of your products much better.

For example, using a 360 degree view, you can demonstrate the features and design of a new product. Videos are also a great tool for obtaining higher response rates and guiding recipients to specific landing pages.

Video email tips

- An email teaser should be no longer than 20 seconds.
- Landing page videos should be no longer than 60 seconds.
- Rapid intercutting between images attracts greater attention.
- Use animation in intros, animate info graphics and transitions.
- Place a call-to-action at the end of a video.

Incorporating videos into emails

This topic describes different methods to incorporate videos into emails.

> **Note:** The Flash format is not a suitable option for videos in emails, because most email programs block Flash applications for security reasons. However, there are other ways to incorporate moving images into emails.

Animated GIF

This is the best format for showing a video directly in an email, because many email programs can play GIFs without difficulty. Compared to other formats, the quality of animated GIFs is limited and they do not allow audio playback.

A comparison of advantages and disadvantages shows that animated GIFs can be used primarily as teasers lasting only a few seconds. To incorporate full videos, add a playback button to animated GIFs, linked to a landing page. The email should explain that there is no audio playback.

Advantages	Disadvantages
• Videos run directly in an email • Broadly supported by current email programs and web mailers • Unsupported email programs (such as Microsoft Outlook) display the first frame as a fixed image (fallback)	• No audio • Limited quality (in terms of color intensity, image frequency) • No compression (that is file size increases proportionally with frame rate, each individual image is stored) • No control elements

> **Note:** The width of the GIF must be less or equal to the width of the content paragraph in your mailing. Example: If you are adding a GIF with a width of 650 pixels to a Text/Image paragraph with a content width of 600 pixels, the GIF will be compressed and lose its animation.

Landing page

Rather than integrating a video into an email, insert a screenshot from the video (such as the opening image) into a newsletter, along with a playback button that links to a landing page containing the video. You can couple this variant with an animated GIF. The recipient sees a moving image in the email with a teaser lasting several seconds. If he/she clicks on it, the actual video starts running in the landing page.

Advantages	Disadvantages
• Simplest way of linking videos and emails • Supported by current formats (Flash, MP4, HTML5)	• Large videos or high click rates require a hosting service • This sort of "fake player" can irritate recipients, who may expect the video to run in the email

Advantages	Disadvantages
• Practically unlimited video length and quality • Video and audio • Control elements may be used • Does not require videos to be adjusted to your newsletter's specific format	

To accommodate recipients who set their email programs to suppress images, include a text link to the video in addition to the fake player. To avoid irritation caused when the video begins running in the browser rather than in the email, include a note indicating that the video will run externally.

YouTube videos

Several email programs (Google Mail, Outlook, Yahoo) allow videos hosted on YouTube to be played back directly in an email.

Advantages	Disadvantages
• Videos are hosted on a widely used platform • Supported by many email programs (playback in the email)	• Video URLs may not be substituted with tracking URLs, to ensure reliable identification • Identified URLs are extracted; does not allow incorporating the player into email

Videos recognized by email programs are displayed across or at the bottom of the body of an email. If the recipient clicks the link, the video generally starts running in a layer (Lightbox).

HTML5 video

Mobile devices in particular, like iPhones and iPads, run videos in their email programs.

Advantages	Disadvantages
• Allows embedding of high-quality videos. • Audio track. • Displays control elements.	• Not supported by many email programs. • Only useful as a supplement in combination with other options.

HTML5 videos can be combined with animated GIFs or a landing page to enable recipients to play back videos. HTML5 video tags and an image tag with an animated GIF or fake player are incorporated into the email source code. The relevant variant is then delivered to the recipient, according to the type of email program he/she uses. Insert the HTML code snippet directly into the email, for example into the source code paragraph of the Template Kit.

Testing and evaluation – Finding the right technical implementation

To give your video email strategy the greatest opportunity for success, you can test how well each integration method works by applying A/B tests to a representative sampling of your recipients. This is an easy way to determine the best approach for embedding videos and which offers the highest conversion rates.

The chart below shows a split test with results for the variants described above.

Video embedding	Split A	Split B	Split C
Animated GIF and landing page	✓	✓ *	✓ *
Landing page with embedded video	✓	✗	✗
HTML5 video	✗	✓	✗
Youtube video	✗	✗	✓

> **Note:** The animated GIF in Split B and Split C should be included as a fallback option; recipients who cannot display the embedding variant used only see an animated GIF.

Reporting

Evaluating clicks on video links is easy using conventional tracking. Depending on the technique being used, you also can collect data on playback time and playback rate. At minimum, measure conversion and click-through rates to evaluate the effectiveness of your videos. In particular, assess the following steps/actions:

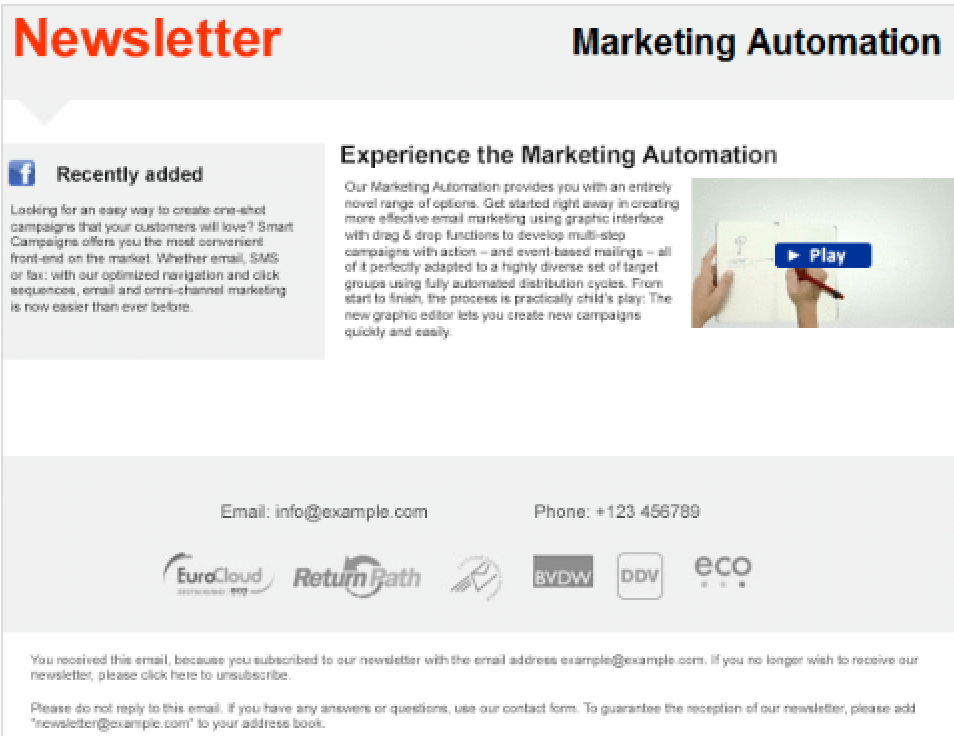
- Recipient clicked on the landing page in the newsletter
- Recipient ran video (web analysis accessibility required)
- Time spent on landing page (web analysis accessibility required)

To assess how many recipients made a purchase after viewing a video, set up a segment in your web analysis software that links two actions:

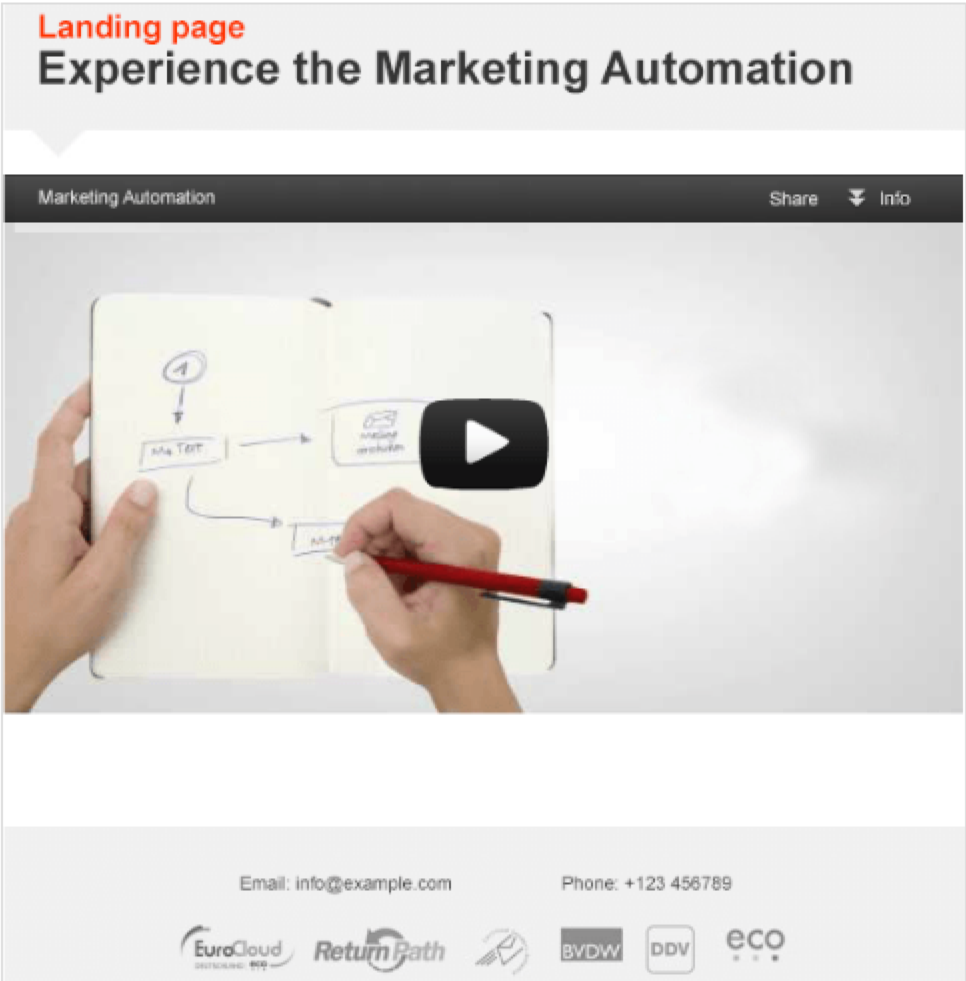
1. Recipient made a purchase in the product category.
2. Incoming page (the page clicked on to reach the product page) equals video landing page.

Example: Video in a newsletter

This example uses a mailing containing an animated GIF teaser that links to a landing page with a full-scale, high-quality video. The animated GIF is created from a short sequence taken from the video and loaded into the mailing as a normal image file. This animated GIF is set in a text/image paragraph, together with the teaser text. The mailing would appear this way in an inbox:



The animated GIF links to a landing page. The full, high-resolution video is integrated into this landing page. The video itself can be hosted on YouTube, Vimeo or another hosting service. These services supply a snippet of code that you insert into the source code:



Creating a video mailing with an animated GIF and landing page

1. Load the video to a hosting service (such as YouTube or Vimeo), if you are not hosting it yourself.

   > **Tip:** Use a standard video format such as the widely available and high-quality MP4 format.

2. Create an animated GIF to use as a teaser. Animated GIFs can be created using standard editing programs like Adobe Photoshop.

> **Note:** The width of the GIF must be less or equal to the width of the content paragraph in your mailing. Example: If you are adding a GIF with a width of 650 pixels to a Text/Image paragraph with a content width of 600 pixels, the GIF will be compressed and lose its animation.

3. Set up a mailing in the client where you want to insert the teaser.
4. Create a landing page based on this mailing.
5. Switch back to the mailing and insert a text/image paragraph. Upload the animated GIF in the **Image** tab and compose the paragraph in the usual manner.
6. Select the landing page from the list in the **Link** field.
7. If needed, add a note indicating that the video will open in an external browser window.
8. Open the landing page and insert a source code paragraph containing the code snippet that embeds the video. You can get this code snippet from YouTube by going to the video and clicking **Share** and then **Embed**. You can get the code from Screencast by hovering over the video icon and then clicking **Share**.
9. Save and test the mailing.

Recipients

This section shows how to manage active and inactive recipients, create target groups and send personalized content to customer segments.

- Recipients overview. Functions for working with recipient data sets.
- Trial import. Check the data in a recipient list before the actual import.
- Import. Import recipients into a recipient list.
- Export. Export recipients to a CSV file.
- Cross-checking recipients. Identify the recipients of a mailing and the internal lists used.
- Recipient lists. Copy, edit and clear recipient lists.
- Target groups. Generate, use and analyze segments.
- Opt-in. Information on the opt-in procedure.
- Unsubscribers. Manage recipients who have unsubscribed from a mailing.
- Recipient history. Display mailing progress with individual recipients.
- Export mailing and performance data. Export response data as CSV or XML.
- Click profiles. Create, edit and assign click profiles.
- Responses. View bounces and replies.
- Blocklist overview. Manage the blocklist.
- Preference Center. Set up a Preference Center for profile self-administration.
- Connect for Campaign. An add-on that connects Optimizely CMS, Optimizely Forms, and Optimizely Campaign.

Recipient overview

To open the recipients overview, open the Optimizely Campaign menu and select **Recipients** > **Overview**.The recipient overview provides access to functions for working with recipient data sets.

Option	Action steps
Show recipient datasets	Select a recipient list.
Filter selected datasets	Select a target group from the **Target Group** list and click **Apply**.
Search	To search for a recipient or key word within a dataset, enter a search term into the **Free text** search box and click **Apply**.
Create recipient	1. Click **Create Recipient...**. An row of input boxes appears. 2. Enter data for the new recipient. 3. Click **Confirm**. The list is re-sorted. See also Add element.
Edit recipient	1. Select a recipient from the list and click **Edit Recipient...**. Editable fields change to input boxes. 2. Click **Submit**.
Delete recipient	**Note:** Only use **Delete Recipient** to remove a recipient whose email address does not exist. Recipients who should not receive email from you because of a complaint should be added to the blocklist. 1. From the list, select a recipient and click **Delete Recipient**. 2. Confirm.
Block recipient	See Blocklist overview. 1. Select a recipient from the list and click **Block Recipient**. The **Block Recipient** dialog box appears. 2. Optionally, enter a blocklisting reason, such as, *complaint by telephone*. 3. Click **Apply**. The recipient is added to the blocklist.
Anonymize tracking	**Note:** To enable this feature, contact customer support.

<table>
<tr><th>Option</th><th>Action steps</th></tr>
<tr><td></td><td>
Lets you deactivate personalized tracking of opens and clicks for a recipient. If you do, the recipient is no longer included in action-based target groups (that is, has clicked link B in mailing A), even if the recipient meets the target group's conditions.

To deactivate personalized tracking for a recipient, select a recipient and click Anonymize Tracking.
In the dialog box that opens, confirm.

Note: Personal action-based data is anonymized from the time of activation. Action-based data from the recipient history is not retrospectively anonymized. If you later reactivate personalized tracking, anonymized action data is not restored and assigned to the recipient.
Tip: You can also use the Optimizely Campaign HTTP API to set up the tracking opt-out option in your mailings. See HTTP API on Optimizely World.
</td></tr>
<tr><td>Download recipient</td><td>
Note: You need the permission to download recipient lists.
To save recipients in a recipient list or a selected set of recipients to a CSV file, click Save  at the bottom of the list.
Warning: Take care when handling the downloaded data
A recipient list or set of recipients downloaded with this function also contains data for unsubscribed recipients, blocked recipients, and recipients for whom the bounce limit is exceeded. Do not use this dataset for sending messages or mailings from other
</td></tr>
</table>

Option	Action steps
	clients or mailing systems. To export only active recipients in a recipient list, use Recipient export instead.

Test import

This topic describes how to use the test import to determine how many recipients in a file are recognized by Optimizely Campaign versus how many are new.

> **Tip:** Unlike import, no changes are made to a recipient list during a trial import.

To perform a test import of your recipient data, follow these steps:

- Step 1: Start
- Step 2: Recipient list
- Step 3: Row mapping
- Step 4: Import type and import options
- Step 5: Import

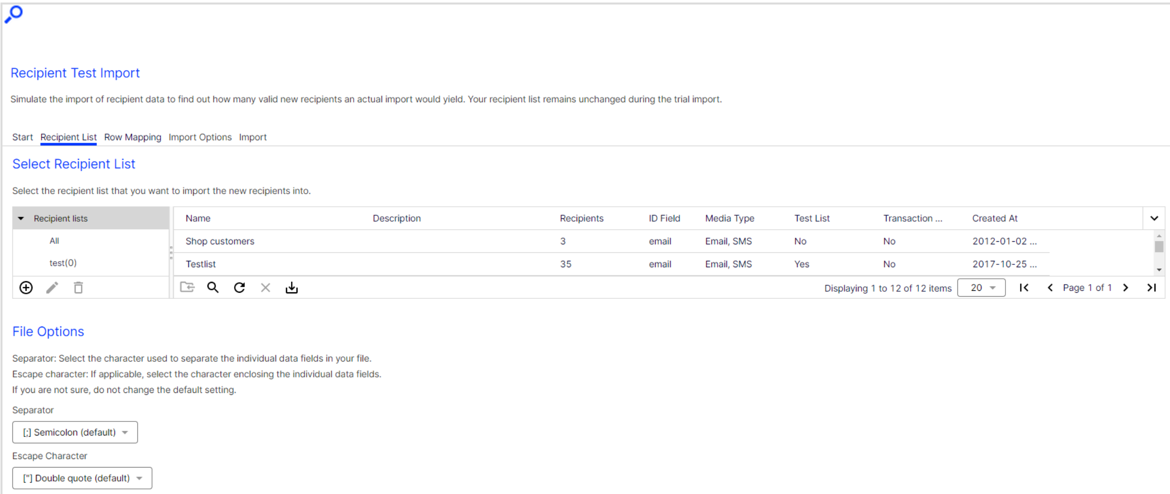
Step 1: Start

1. Open the Optimizely Campaign menu and select **Recipients** > **Trial Import**.
2. Click **Browse...** and select the file with the recipient data.

   > **Note:** The maximum allowed file size is 50 MB. To upload larger files, see **Transferring files through SCP** and Automatic recipient import.

3. Click **Next**. The file is uploaded to the Optimizely server.

Step 2: Recipient list



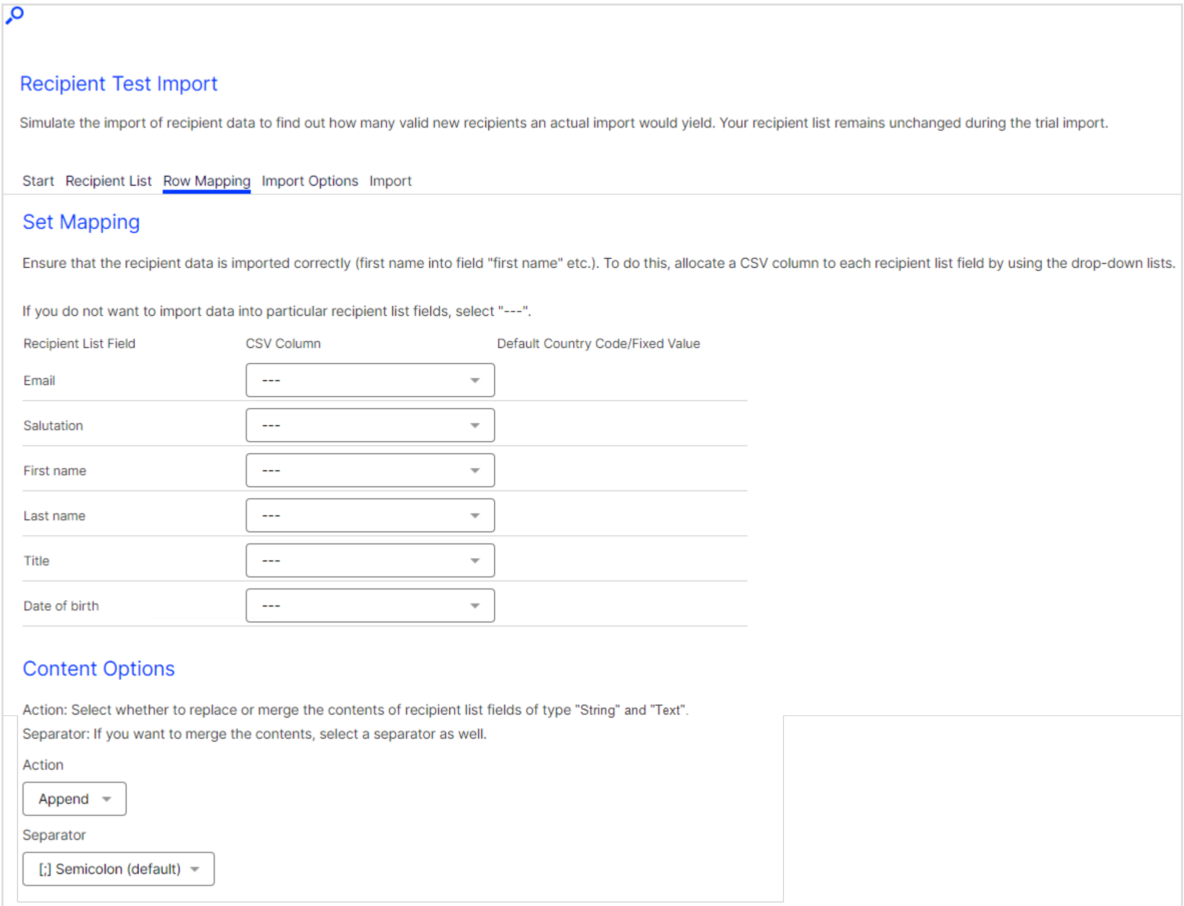
1. In the **Select Recipient List** area, click the list to which you want to import new recipients.
2. In the **File Options** area, specify the characters your CSV file uses to separate the entries.
   - **Separator**. Select a character (semicolon, comma, tabulator and so on) that separates data fields on the lines of the uploaded file.
   - **Escape character**. Some database programs use a single quote (') or double quote (") around each data field when exporting. Select which one is used in the uploaded file.
3. Click **Next**.

> **Tip:** You cannot add new recipient lists. New recipients are added to an existing list.

Step 3: Row mapping

You must assign each column of the recipient list to a corresponding column in the imported recipient list. The left column of the **Row Mapping** tab lists fields of the Optimizely

Campaign recipient list into which you are importing. The right column contains column headers from the imported list.



1. Assign fields according to their content. Typically, Optimizely Campaign suggests the correct assignment (such as matching *first name* with *first name*). However, if *first name* in the recipient lists corresponds to *name* in the file, you must select the correct assignment.
2. If you prefer to import data fields selectively (for example, only recipients' last names have changed), select the **---** option for fields that should not be changed.
3. Select the **Fixed value** check box to change the pop-up menu to an entry field in which you can enter any text or value. This value or text is then imported into the corresponding field for each record.

For example, you generate email addresses of newsletter subscribers through your website as well as other sources (cooperation partners and so on). If you import records supplied by a cooperation partner, use the **Origin** field to indicate the partner's name or a corresponding code, so you can track the subscription's origin. You can also evaluate the activity of subscribers from various sources.

For another example, if your recipient list also contains mobile numbers, enter a country code for these fields during import if the imported numbers do not contain them. The country code is automatically prepended to the telephone number, and the telephone number may be standardized (eliminating the 0 before the area or network code).

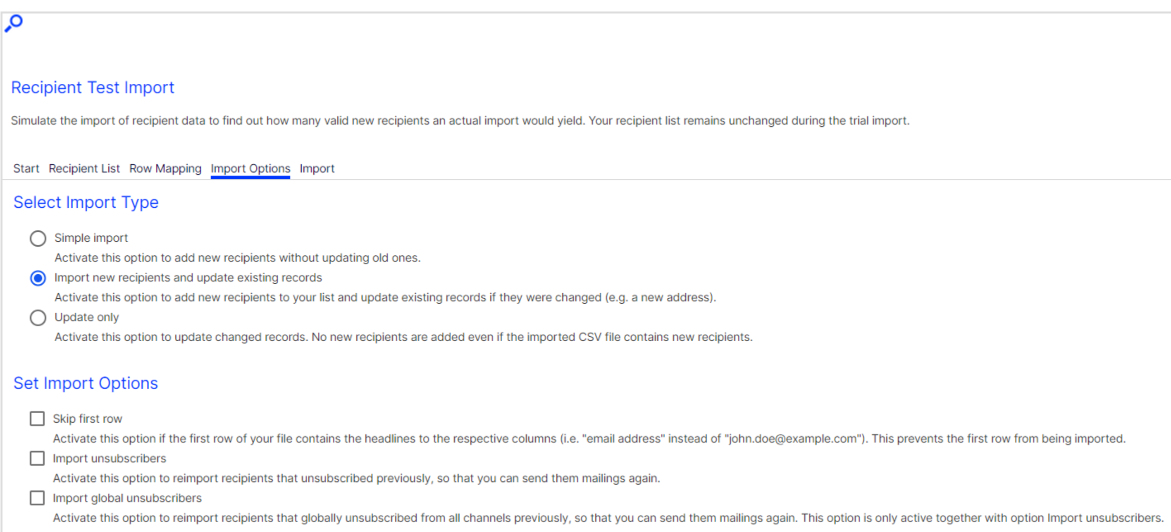
4. Under **Content Options**, the **Action** drop-down list lets you select whether to replace, prepend, or append contents of recipient list fields of type "String" and "Text".

> **Tip:** See also: **Data types**.

When you select the **Prepend** or **Append** action, the **Separator** drop-down list appears. Select a character (semicolon, comma, tabulator and so on).

5. Click **Next**.

Step 4. Import type and import options



1. In the **Select Import Type** area, select the import type.

   Depending on the configuration of your client and your user authorization, you may see only some options.

   - **Simple import**. Imports new recipients into your list. Existing records, unsubscribes or blocked recipients are skipped.
   - **Import new recipients and update existing records**. Default import type. New recipients are added to the recipient list. Existing records are checked and updated as required. Optimizely Campaign identifies recipients by recipient ID, usually email address. If a recipient's email address has changed, he is imported again, becauseOptimizely Campaign does not recognize it as an existing recipient.
   - **Update only**. Does not import new recipients. Only updates existing records as needed. If a recipient's email address changed, the recipient is skipped, because Optimizely Campaign does not recognize it.
   - **Clear recipient list before importing**. Overwrite existing recipient list in Optimizely Campaign with data from the uploaded file. You should upload your complete address data.

     Overwriting can be practical if recipients can unsubscribe both by clicking in the newsletter and through the call center. In this case, the unsubscribe information must find its way to Optimizely Campaign so that these recipients are unsubscribed and receive no further mailings. If your call center deletes a record from your database or CRM software, you can guarantee that this recipient is deleted by selecting **Clear recipient list before importing**.

2. In the **Set Import Options** area, select one or more of the following import options:

   - **Skip first row**. Often, the uploaded file has field names in the first row. Select to skip the table headers and start importing with the second row.
   - **Import unsubscribers**. If this option is displayed, you can import recipients who are marked as unsubscribed in your client. Newly-imported recipients receive mailings right after importing them with this import option.
   - **Import global unsubscribers**. Activate this option to reimport recipients that globally unsubscribed from all channels previously, so that you can send them mailings again.

> **Note:** This option is only active together with option **Import unsubscribers**.

> **Note:** Permission is required for recipients. Do not send newsletters to unsubscribed recipients, if no permission (opt-in) exists.

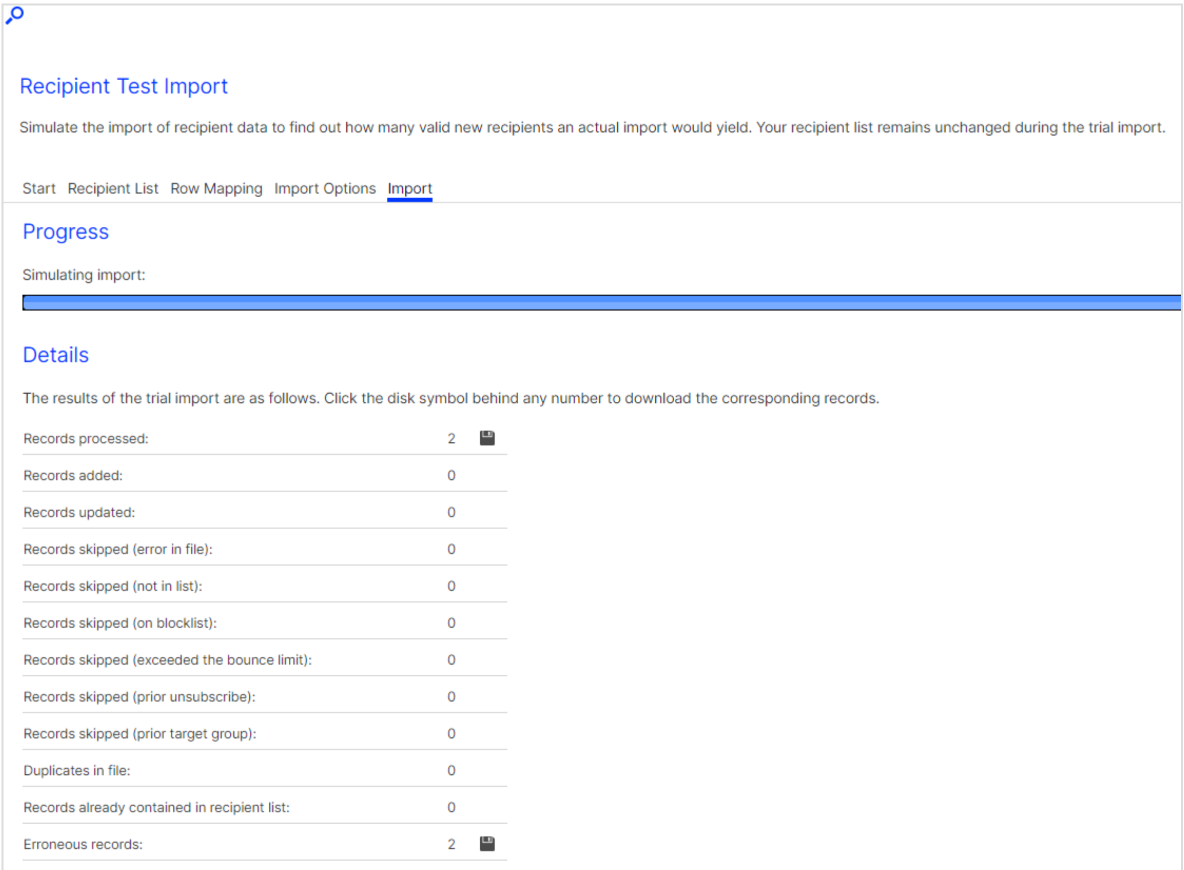
3. Add opt-in processes if you want to import recipients from a source that is not linked to an automatic opt-in process, such as from a telephone campaign. Imported recipients receive a welcome or a confirmation email with an activation link. You can select this option only if the confirmation mailing is set up and edited beforehand.

> **Note: Only import recipient lists once**
>
> If a double opt-in process is selected, imported recipients only appear in the list after they have clicked the activation link in the confirmation email. Optimizely Campaign automatically sends this email after the import, if an opt-in process is selected.
>
> Only import recipients once, even if they do not appear in the list after the import. Otherwise, a confirmation email is sent each time you carry out an import.

4. Click **Trial Import**. The import starts and the **Import** tab opens.

Step 5: Import

When the import is finished, **Save** appears next to each category for which records were found. Click **Save** to download those records.



The number of processed records and the import result are listed for each category:

- **Records processed**. Number of processed records.
- **Records added**. Number of newly added records.
- **Records updated**. Number of updated records.
- **Records skipped (error in file)**. The column assignment did not correspond with the selected values in the third step. For example, a record may contain only three columns instead of the indicated four columns.
- **Records skipped (error in list)**. Number of skipped records; because they already exis-ted, no changes were found, or you selected the option **Update only** and new records were found in the list.
- **Records skipped (on blocklist)**. Recipients that are blocked. Depending on your client hierarchy, there might be several blocklists. A blocked recipient might not appear in the blocklist of your client, but be blocked on the list of the main client.

- **Records skipped (exceeded the bounce limit)**. Recipients that exceeded the bounce limit.
- **Records skipped (prior unsubscribes)**. Recipients who previously unsubscribed.
- **Records skipped (prior target group)**. The recipients were not imported because your client or the confirmation email (confirmed or double opt-in) uses target groups that do not match.
- **Duplicates in file**. Recipients only imported once to avoid duplicates in the recipient list.
- **Records already in recipient list**. Recipients already in the recipient list are skipped to avoid duplicates.
- **Erroneous records**. Optimizely Campaign validates data when importing them. Erroneous records may contain invalid characters or, in case of email addresses, a missing @ symbol or an invalid domain. Such records are not imported.

> **Tip:** You can download the analyzed records to filter out duplicates or invalid email addresses. To do so, in the overview, click **Save** next to the corresponding category.

Importing recipients

Import a file that contains recipient data using a CSV file. If the source file is not in this format, or to export recipient data from your local database or CRM first, ask your IT department for assistance. If the source file is a spreadsheet, convert it to CSV with the **Save as** command.

> **Tip: Trial import**
>
> Before importing, run a **Test import** to check recipient list data and the correct assignment to a Optimizely Campaign recipient list.

To import your recipient data, follow these steps:

- Step 1: Start
- Step 2: Recipient list

- Step 3: Row mapping
- Step 4: Import type and import options
- Step 5: Import

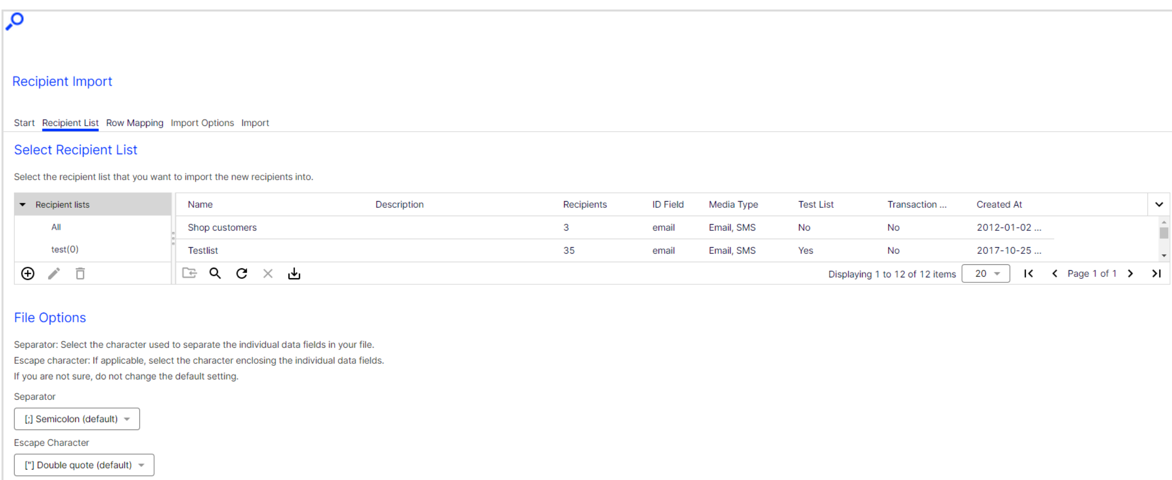
Step 1: Start

1. Open the Optimizely Campaign menu and select **Recipients** > **Import**.
2. Click **Browse** and select the file with the recipient data.

> **Note:** The maximum allowed file size is 50 MB. To upload larger files, see **Transferring files through SCP** and Automatic recipient import.

3. Click **Next**. The file is uploaded to the Optimizely server.

Step 2: Recipient list



1. In the **Select Recipient List** area, click the list to which you want to import new recipients.

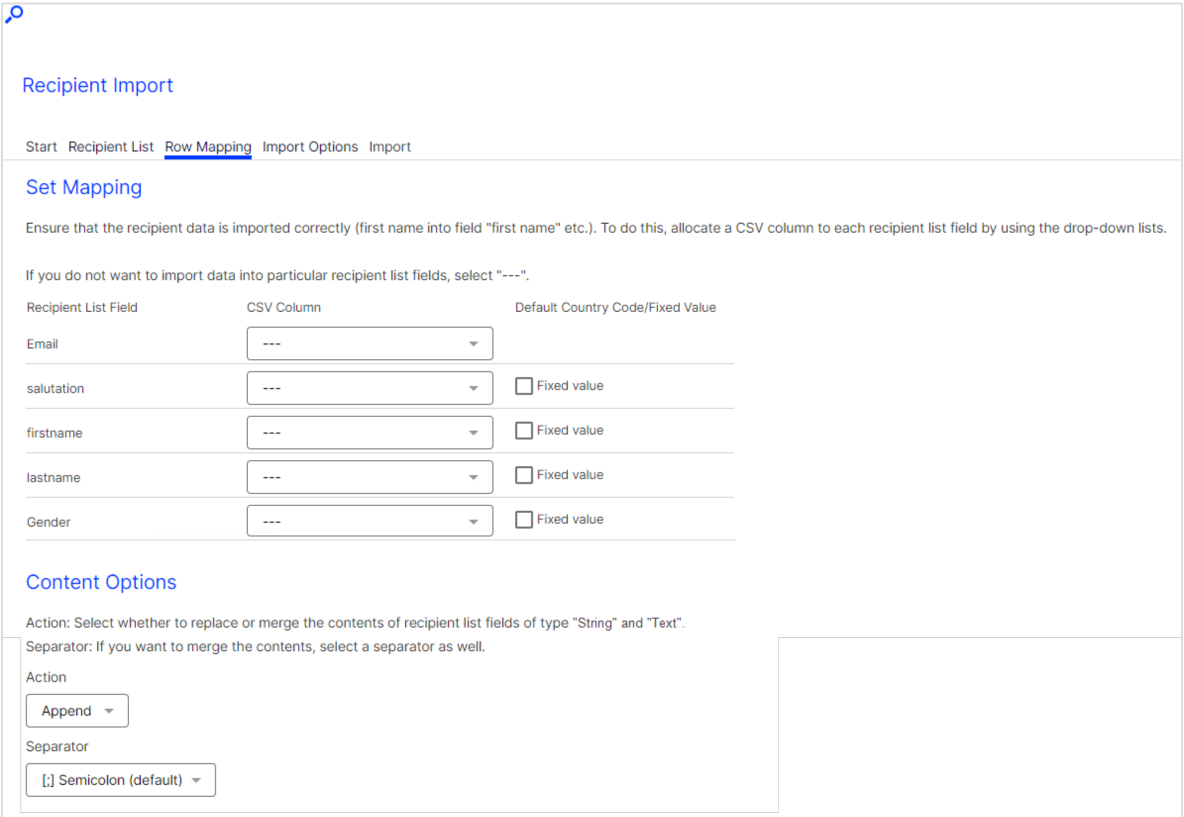
> **Note:** If you want the recipients to be imported to go through an opt-in process, you must select an opt-in recipient list. You can make further settings for the opt-in process in step 4.

2. In the **File Options** area, specify the characters your CSV file uses to separate the entries.
   - **Separator**. Select a character (semicolon, comma, tabulator and so on) that separates data fields on the lines of the uploaded file.
   - **Escape character**. Some database programs use a single quote (') or double quote (") around each data field when exporting. Select which one is used in the uploaded file.
3. Click **Next**.

> **Tip:** You cannot add new recipient lists. New recipients are added to an existing list.

Step 3: Row mapping

You must assign each column of the recipient list to a corresponding column in the imported recipient list. The left column of the **Row Mapping** tab lists fields of the Optimizely Campaign recipient list into which you are importing. The right column contains column headers from the imported list.



1. Assign fields according to their content. Typically, Optimizely Campaign suggests the correct assignment (such as matching *first name* with *first name*). However, if *first name* in the recipient lists corresponds to *name* in the file, you must select the correct assignment.
2. If you prefer to import data fields selectively (for example, only recipients' last names have changed), select the **---** option for fields that should not be changed.
3. Select the **Fixed value** check box to change the pop-up menu to an entry field in which you can enter any text or value (except for the **Email** field). This value or text is then imported into the corresponding field for each record.

   For example, you generate email addresses of newsletter subscribers through your website as well as other sources (cooperation partners and so on). If you import records supplied by a cooperation partner, use the **Origin** field to indicate the partner's name or a corresponding code, so you can track the subscription's origin. You can also evaluate the activity of subscribers from various sources.

For another example, if your recipient list also contains mobile numbers, enter a country code for these fields during import if the imported numbers do not contain them. The country code is automatically prepended to the telephone number, and the telephone number may be standardized (eliminating the 0 before the area or network code).

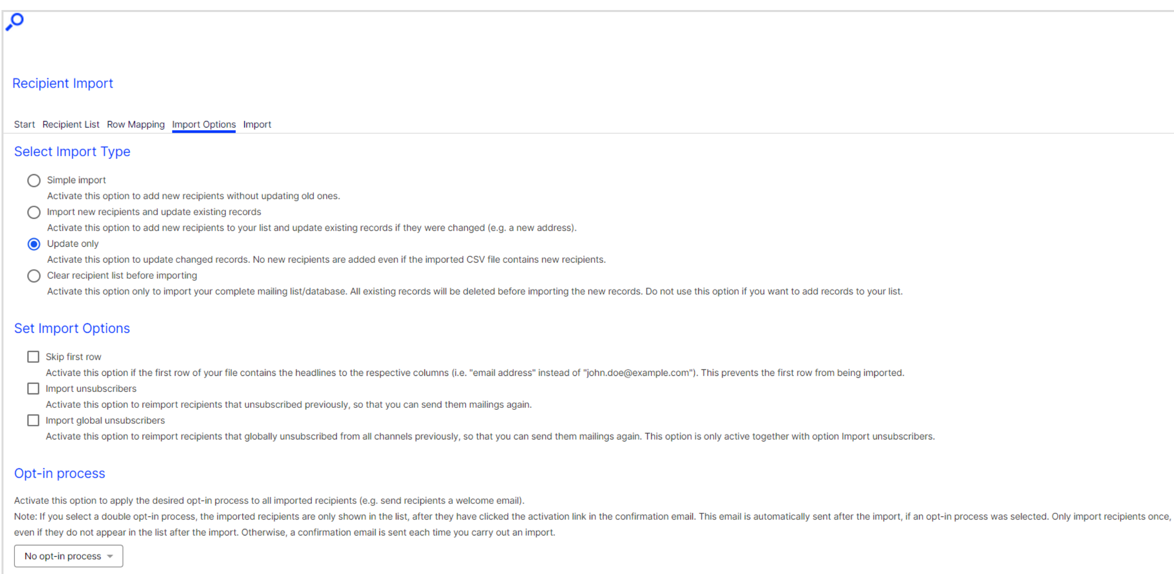
4. Under **Content Options**, the **Action** drop-down list lets you select whether to replace, prepend, or append contents of recipient list fields of type "String" and "Text".

> **Tip:** See also: **Data types**.

When you select the **Prepend** or **Append** action, the **Separator** drop-down list appears. Select a character (semicolon, comma, tabulator and so on).

5. Click **Next**.

Step 4: Import type and import options



1. In the **Select Import Type** area, select the import type.

   Depending on the configuration of your client and your user authorization, you may see only some options.

   - **Simple import**. Imports new recipients into your list. Existing records, unsubscribes or blocked recipients are skipped.
   - **Import new recipients and update existing records**. Default import type. New recipients are added to the recipient list. Existing records are checked and updated as required. Optimizely Campaign identifies recipients by recipient ID, usually email address. If a recipient's email address has changed, he is imported again, because Optimizely Campaign does not recognize it as an existing recipient.
   - **Update only**. Does not import new recipients. Only updates existing records as needed. If a recipient's email address changed, the recipient is skipped, because Optimizely Campaign does not recognize it.
   - **Clear recipient list before importing**. Overwrite existing recipient list in Optimizely Campaign with data from the uploaded file. You should upload your complete address data.

     Overwriting can be practical if recipients can unsubscribe both by clicking in the newsletter and through the call center. In this case, the unsubscribe information must find its way to Optimizely Campaign so that these recipients are unsubscribed and receive no further mailings. If your call center deletes a record from your database or CRM software, you can guarantee that this recipient is deleted by selecting **Clear recipient list before importing**.

2. In the **Set Import Options** area, select one or more of the following import options:

   - **Skip first row**. Often, the uploaded file has field names in the first row. Select to skip the table headers and start importing with the second row.
   - **Import unsubscribers**. If this option is available, you can import recipients who are already marked as unsubscribed in your client. Newly-imported recipients receive mailings right after importing them with this import option.
   - **Import global unsubscribers**. If this option is available, the **Import unsubscribers** option only affects the marketing channels (media types) of the selected recipient list. If you activate both options, you import recipients that globally unsubscribed from all marketing channels.

> **Note:** This option is only active together with the **Import unsubscribers** option.

> **Note:** Permission is required for recipients. Do not send newsletters to unsubscribed recipients, if no permission (opt-in) exists.

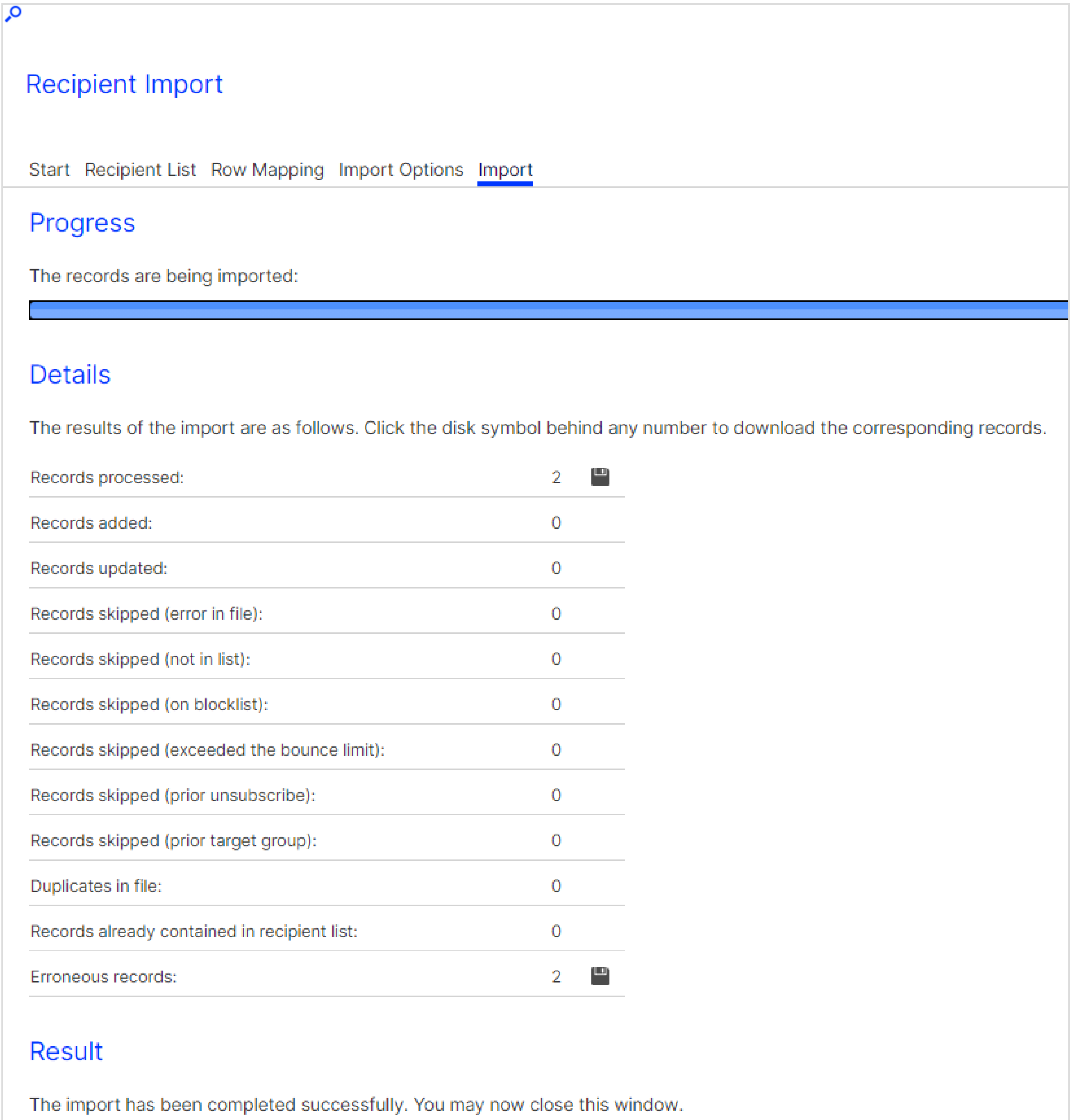
3. Add opt-in processes if you want to import recipients from a source that is not linked to an automatic opt-in process, such as from a telephone campaign. Select **Standard** for a Single Opt-In process or **DOI** for a Double-Opt-In process. Imported recipients receive a welcome or a confirmation email with an activation link. You can select this option only if the confirmation mailing is set up and edited beforehand.

> **Note: Only import recipient lists once**
>
> If a double opt-in process is selected, imported recipients only appear in the list after they have clicked the activation link in the confirmation email. Optimizely Campaign automatically sends this email after the import, if an opt-in process is selected.
>
> Only import recipients once, even if they do not appear in the list after the import. Otherwise, a confirmation email is sent each time you carry out an import.

4. Click **Import**. The import starts and the **Import** tab opens.

Step 5: Import

When the import is finished, **Save** appears next to each category for which records were found. Click **Save** to download those records.



The number of processed records and the import result are listed for each category:

- **Records processed**. Number of processed records.
- **Records added**. Number of newly added records.
- **Records updated**. Number of updated records.

- **Records skipped (error in file)**. The column assignment did not correspond with the selected values in the third step. For example, a record may contain only three columns instead of the indicated four columns.
- **Records skipped (error in list)**. Number of skipped records; because they already exis-ted, no changes were found, or you selected the option **Update only** and new records were found in the list.
- **Records skipped (on blocklist)**. Recipients that are blocked. Depending on your client hierarchy, there might be several blocklists. A blocked recipient might not appear in the blocklist of your client, but be blocked on the list of the main client.
- **Records skipped (exceeded the bounce limit)**. Recipients that exceeded the bounce limit.
- **Records skipped (prior unsubscribes)**. Recipients who previously unsubscribed.
- **Records skipped (prior target group)**. The recipients were not imported because your client or the confirmation email (confirmed or double opt-in) uses target groups that do not match.
- **Duplicates in file**. Recipients only imported once to avoid duplicates in the recipient list.
- **Records already in recipient list**. Recipients already in the recipient list are skipped to avoid duplicates.
- **Erroneous records**. Optimizely Campaign validates data when importing them. Erroneous records may contain invalid characters or, in case of email addresses, a missing @ symbol or an invalid domain. Such records are not imported.

> **Tip:** You can also import recipients automatically on a regular basis, for example to synchronize them with an external distribution list. For more information, see Scheduled jobs.

Importing recipients by category

> **Note:** To enable this feature, contact customer support.

If you maintain distribution lists in an external system, this additional feature lets you synchronize your external distribution list with Optimizely Campaign recipient lists. This feature lets you automatically import recipients into your client.

You can import the following categories in individual CSV files or as multiple lists with markers for each category:

- Recipients
- Unsubscribers
- Blocked recipients
- Post clicks (requires a web analysis program with an export function)

Exporting recipients

> **Note:** You need special user rights to use this function.

You can export recipients by status into a CSV file:

- Active recipients
- Unsubscribed recipients
- Blocked recipients
- Recipients that exceeded the bounce limit

To export recipients:

1. Open the Optimizely Campaign menu and select **Recipients** > **Export**.
2. Select the recipients you want to export.
3. Click **Options**.
   - **Active Recipients**. Click the recipient list whose recipients you want to export. To export only recipients of a specific marketing channel, select the marketing channel from the **Media Type** drop-down list (available for active recipients only). You can also limit the recipient list by selecting one or more target groups from the **Target Groups** drop-down list.
   - **Unsubscribed Recipients**. Enter a start and/or an end date.
     - If you do not enter a start or end date, all recipients in the selected status are exported.

- If you enter only a start date, recipients from that date to the present are exported.
- If you enter only an end date, recipients from the creation of your client until the entered date are exported.

> **Tip:** If you use unsubscribe lists based on recipient lists, also select an unsubscribe type:
>
> - **Global**. Exports client-wide unsubscribers that are not assigned to any particular recipient list.
> - **Recipient List**. Exports unsubscribers that are assigned to one or more recipient lists.

- **Blocked Recipients**. Click the recipient list whose recipients you want to export.
- **Recipients That Exceeded the Bounce Limit**. Enter a start and/or an end date.
  - If you do not enter a start or end date, all recipients in the selected status are exported.
  - If you enter only a start date, recipients from that date to the present are exported.
  - If you enter only an end date, recipients from the creation of your client until the entered date are exported.

4. Click **Finish**.

> **Tip:** You can start several exports for different statuses simultaneously, but only one export per status.

Exporting recipients by category

> **Note:** To enable this feature, contact customer support.

This function lets you automatically export recipient data by category into CSV files.

- Active recipients
- Blocked recipients

- Post clicks (requires web analytics software with an export function)
- Recipients that exceeded the bounce limit

An individual CSV file is created for each category. Alternatively, you can create a multiple lists with flags for each category.

Cross-checking recipients

Optimizely Campaign identifies the recipients of a mailing and which internal lists are used for this purpose. If you maintain recipient lists outside the Optimizely Campaign environment, this information can help keep your lists consistent. If you have questions regarding the operation and configuration of your client, contact customer support.

Optimizely Campaign validates recipient data in the following modules and functions:

- Importing recipient lists
- Calculating recipients for a mailing
- Sending out a mailing
- Editing the blocklist

The following lists, managed internally by Optimizely Campaign, also impact the validation of recipients for mailing dispatches:

- Unsubscribe list
- Bounce counter

Cross-checking recipient lists

Duplicates

When you import a recipient list, Optimizely Campaign filters out duplicates. Duplicates within imported CSV files are also checked, so only one record per recipient is imported.

> **Tip:** If you select the **Clear recipient list before importing** option, the list is not cross-checked because it is deleted before any data is

> imported.
>
> If you select the **Import new recipients and update existing records** option, existing records are not treated as duplicates but are overwritten with new values.

Blocklist

Imported records are cross-checked against the blocklist. Blocked recipients, including those serving as placeholders, are not imported.

Unsubscribers

Unsubscribers are included on an unsubscribe list, which usually applies to clients (though not inherited). You can create unsubscribe lists based on recipient lists and permanently linked to a recipient list, which do not affect other recipient lists in the same client.

Unsubscribers are not deleted from the database and not imported a second time.

Incorrect data records

During import, Optimizely Campaign checks the following email address criteria:

- An address must contain exactly one @ symbol.
- An address's local element (before @) may not begin or end with a dot.
- Two consecutive dots cannot occur
- Blank spaces and the following special characters are not permitted: `( ) [ ] \ ; : , < >`
- An address's domain element (after @) must conform to the domain name system rules

Imported records must also have fields in the recipient list that match columns in the imported list. Incorrect records are not imported.

Analyzing records that are not imported

After importing a recipient list, you can download the non-imported records as a CSV file for each category described above. Use this file to manage the original list.

Cross-check for mailing dispatch

When you initiate a mailing, recipients are selected based on the following criteria and algorithms:

- Recipients on a blocklist, unsubscribers, and recipients with a bounce overflow are not contacted.
- Where applicable, target groups and maximum numbers of recipients are determined.
- Email addresses are checked for correctness (see Incorrect data records).

After a mailing is sent out, responses are analyzed. Recipient addresses that produce a bounce generate an automatic reply to the return address. The replies are analyzed by Optimizely Campaign. Hard and soft bounces are counted separately for each recipient. A recipient who reaches the bounce limit for hard or soft bounces will not be contacted again. These recipients remain on the recipient list but are skipped when mailings are sent out (see Bounces).

Recipients who click the unsubscribe link are placed on the unsubscribe list. These recipients still appear in the recipient list but will not be sent mailings. The unsubscribe list records the email, a time-stamp, and the mailing the recipient received when he/she unsubscribed. These records make it easier to track cancellations – in the event of a complaint, for instance.

Cross-checking bounces

A bounce is generated whenever an email fails to reach a recipient's email server or mailbox. It informs the sender that the email could not be delivered.

Soft bounces

A soft bounce is generated when a mailbox is temporarily unavailable, such as when a mailbox is full and unable to accept more email until the user deletes some. Soft bounces seldom occur, because memory is usually large enough to handle a large number of emails.

Hard bounces

A hard bounce is generated when a server address or mailbox does not exist due to a technical problem (such as a server is down). A hard bounce is also generated if a mailbox no longer exists, which may have several reasons:

- The email address is entered incorrectly (even though syntactically correct).
- The user canceled the email account.

Bounce counter and bounce limits

Bounce limits for soft and hard bounces are set when configuring the client. The standard limit is three hard bounces or five soft bounces. Once reaching this limit, the recipient receives no more mailings. Bounces are counted across clients for each recipient.

- **How can I see how many bounces a recipient has generated?**

  You cannot view bounces from the Optimizely Campaign user interface but you can retrieve the number of bounces via the Optimizely Campaign REST API. If you use the SOAP API, the getBounceCounter method also shows the number of bounces.

- **Can I view recipients who have generated a bounce overflow?**

  You cannot view bounced out recipients from the Optimizely Campaign user interface. However, you can use the Exporting recipients by category feature to download bounced out recipients as a CSV file. Contact customer support for assistance.

  You can also use the Optimizely Campaign REST API to get information whether a recipient has exceeded the bounce limit. If you use the SOAP API, the isBounceCounterThresholdExeeded method also shows if a recipient has exceeded the bounce limit.

- **Can I reset the number of bounces generated by the recipient?**

  You cannot reset a recipient's bounce count from the Optimizely Campaign user interface. To reset the bounce count, contact customer support. But you can reset the bounce count via the Optimizely Campaign REST API, or if you use the SOAP API, the resetBounceCounter method also resets the bounce count to 0.

- **If an email account cannot be contacted, does it matter whether and how often I send mailings to it? It may be reactivated at some point.**

  That may be true in theory. In practice, however, mailings to unavailable or non-existent emails are saved and analyzed by the internet service provider. If a sender sends too many emails to unavailable addresses, the provider places the sender on a blocklist and treat those emails as spam. So, it is better to stop mailings to a recipient who generates three/five bounces.

Cross-checking blocklists

Blocklists contain recipients who should not be contacted, including recipients who have submitted complaints, but also known spam traps and postmaster accounts which are standard for every email account.

Blocklist hierarchy and delegation

Depending on the how a client is structured, it can have one or more blocklists. Entries in a blocklist are inherited by sub-clients from main clients. If you lack authorization to access the main client, you cannot view its blocklists. The main client blocklists also apply to the sub-clients.

Placeholders

Blocklists, unlike recipient lists, can use placeholders. For example, you can block a domain. So while a recipient's email address is not specifically on the blocklist, a recipient's domain can block the recipient.

- **Can I define a blocklist for a single recipient list?**

  No. A recipient list applies across clients.

- **Can I view blocklist entries in higher level blocklists?**

  You must have authorization to access a higher level client.

- **Can I prevent a blocklist from being inherited by sub-clients or define exceptions?**

  No. Blocklist entries are inherited by sub-clients. You cannot circumvent this type of inheritance. Also, you cannot define exceptions for blocklist entries.

Cross-checking unsubscribe lists

Recipients who unsubscribe from a mailing by using an unsubscribe link or de-registration form are marked as unsubscribed. However, they are remain on the recipient list. When a mailing is sent, these recipients are filtered out.

- **Can I view the unsubscribe list in my client?**

  You may not view unsubscribe lists using the Optimizely Campaign user interface. There are several ways to retrieve unsubscribers.

  1. Using the **Download unsubscribers** feature, download an unsubscribe list as a CSV file through the user interface.
  2. If you are using the REST API, use the GET method to retrieve information about all unsubscribes.
  3. If you are using the SOAP API, use the contains and containsAll methods to query whether one or more recipients are on an unsubscribe list.
- **Can I configure an unsubscribe list so that it only applies to one recipient list?**

  Yes. You can set up an unsubscribe list based on a recipient list. Whether it makes sense to do so depends on the recipient list and how a client is structured. Contact customer support for assistance.

- **Can I use the Optimizely Campaign user interface to place a recipient on the unsubscribe list or remove him/her from it?**

  No. Only the recipient can complete the unsubscribe process. To rescind an unsubscription, the recipient must re-register (by using the opt-in option, depending on the configuration).

- **Can I unsubscribe a recipient by deleting him/her from the recipient list?**

If you deleted from the recipient list, the recipient no longer receives mailings from this list. If appearing in multiple lists, however, the recipient will continue to receive mailings via the lists from which the recipient is not deleted.

> **Note:** You should not delete a recipient from the list because the recipient's de-registration is not recorded, so the recipient can be added to a recipient list again. This can result in a complaint if the recipient continues to receive mailings after unsubscribing.

- **I manage my recipient list myself and import it to Optimizely Campaign prior to each mailing. What should I keep in mind when doing this?**

  Make sure that you import only active recipients into the recipient list. Import unsubscribers into the unsubscribe list so that the cross check can take place before dispatch.

  You also can use specially designed jobs/services to import unsubscribe lists or multiple lists. These jobs/services are not accessible via the Optimizely Campaign user interface. The lists are transferred onto the Optimizely Campaign server per SFTP and automatically imported to the client:

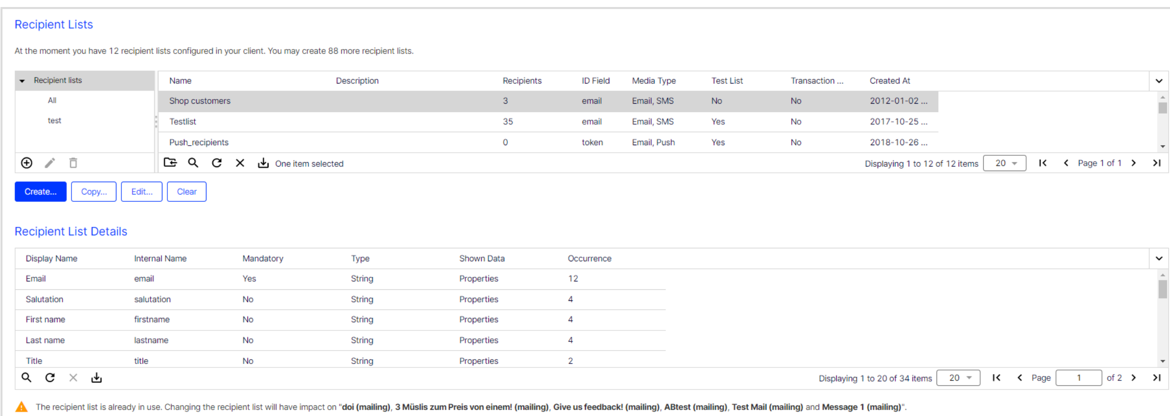
  - **Importing an unsubscribe list**. Import your local unsubscribe list to the unsubscribe list on your client.
  - **Importing recipients including unsubscribers**. Import an individual recipient list that contains active recipients for a variety of recipient lists and unsubscribers. The status of a recipient, or the list to which it is being imported, must be entered in a separate recipient list column to keep your lists consistent.

> **Tip:** Contact customer support for configuration of jobs/services. Imported data must have a defined name and be stored in a defined directory per SFTP.

Recipient lists

> **Tip:** To create a new recipient list or change properties and data fields of existing recipient lists, you can use Recipient list management (Beta).

In the Optimizely Campaign menu under **Recipients** > **Recipient Lists** you can copy, edit or clear recipient lists. The overview area shows recipient lists for your client, and the number of recipients in each list. If you select a recipient list, the **Recipient list details** area provides additional information about the included recipient list fields.



Copying recipient lists

Creates a new recipient list that contains the same data fields as the selected source list. Only the list structure is copied, not the entries.

To copy a recipient list, select a recipient list and click **Copy**.

Editing recipient lists

Change the name or description of a list. You can also set any recipient list as a test list. Use test lists only for sending test emails, not regular sending.

> **Note:** Do not use real customer data for test lists.

To edit a recipient list, select a recipient list and click **Edit**.

Clearing recipient lists

Deletes entries from a recipient list. The list itself is not deleted and can be used again.

To clear a recipient list, select a recipient list and click **Clear**.

> **Tip:** To delete and/or unsubscribe multiple recipients from multiple recipient lists, use Cleanup.

Displaying recipient list details

If **Separate data storage** is activated in your client, you can use **Details** to access the settings to hide or display recipient list fields (data fields) with personal data for users of your client.

1. Click **Details**. The **Show recipient list details** opens.
2. In the list, select the recipient list field you want to hide or display for users of your client.
3. Click **Edit**. In the **Shown data** column, a drop-down list opens.
4. In the drop-down list, select:
   - **Master data**. Display the recipient list field only to users with appropriate permissions.
   - **Properties**. Display the recipient list field to all users.
5. Click **Submit**.
6. If necessary, repeat these steps for additional recipient list fields.
7. To save the changes for recipient lists, click **Apply changes to all lists**. To save the changes only for the selected recipient list, click **Apply changes**.

> **Tip: Separate data storage** supports three user permissions for displaying personal recipient data:
>
> - View **Properties** fields only
> - View **Master data** fields and **Properties** fields separately (so a user cannot associate properties with a recipient)
> - View **Master data** and **Properties** fields

For details about **Separate data storage** and individual user permissions, contact customer support.

Data fields

Every recipient list contains an unlimited number of data fields. One data field is reserved for the recipient ID, usually the email address. You cannot edit the recipient ID field. Instead of the email address, you can use any other ID, such as a customer ID.

Data types

Each data field can store a certain data type, which is selected when the recipient list is created. According to the data type, you can perform mathematical and/or logical operations with the value of a data field. For example:

- **Numbered fields**. Numbers can be integers (32-bit/64-bit) or floating decimals. Compare the value of a field with a given value (equals/is less than/is greater than).
- **Date fields**. Compares date and time (is older than/is younger than/is prior a given time/date/is past a given time/date/is exactly … old).
- **Boolean fields**. Perform *is true* or *is false* operations.
- **String fields**. Congruity or incongruity of strings and characters (*begins with*, *end with*, *does not begin with*, *does not end with*, *contains*, *does not contain*).

The following data types and range of values are permitted for recipient list data fields:

© Optimizely 2022

<table>
<tr><th>Data type</th><th>Range</th><th>Example</th></tr>
<tr><td>Boolean</td><td>true/false</td><td>Registration via website, interested in promotional newsletters</td></tr>
<tr><td>Date</td><td>date</td><td>Registration date. Supported date formats:

Note: Programming interfaces (APIs) only support date formats according to ISO 8601.
<table>
<tr><th>Date format</th><th>Description</th><th>Example</th></tr>
<tr><td>yyyy-MM-dd</td><td>Date with separator</td><td>2017-05-07</td></tr>
<tr><td>yyyy-MM-dd HH:mm:ss</td><td>Date and time</td><td>2017-05-23 09:50:04</td></tr>
<tr><td>yyyy-MM-dd'T'HH:mm:ss</td><td>Date and time according to ISO 8601</td><td>2017-05-23T09:50:04</td></tr>
<tr><td>yyyy-MM-dd'T'HH:mm:ss,SSS</td><td>Date and time with milliseconds</td><td>2017-05-24T08:03:59,123</td></tr>
<tr><td>yyyy-MM-dd'T'HH:mm:ssXXX</td><td>Date and time with time zone offset</td><td>2017-05-07T12:18:54+02:00 2017-05-07T08:18:54-02:00</td></tr>
</table></td></tr>
<tr><td>Float</td><td>single-precision 32-bit IEEE 754 floating point</td><td>Conversion volume, customer score</td></tr>
</table>

Data type	Range	Example
Integer	32-bit-signed; -2,147,483,648 - 2,147,483,647	Customer's year of birth
Long	64-bit-signed; -9,223,372,036,854,775,808 - 9,223,372,036,854,775,807	Customer ID
String	up to 255 characters	Email address, first name, last name, city, postal code
Text	up to 65,535 characters	Email address, first name, last name, city, postal code

Cleaning up recipients

Cleanup lets you automatically delete and/or unsubscribe recipients from recipient lists. You upload a CSV file with the recipients you want to delete or unsubscribe, then select the lists.

> **Note:** To delete and/or unsubscribe recipients, you must have the appropriate rights.

1. Create a CSV file containing the IDs of the recipients you want to delete or unsubscribe.

   > **Tip:** Optimizely Campaign identifies recipients by recipient ID, usually email address.

2. Open the Optimizely Campaign menu and select **Recipients** > **Cleanup**.
3. In the **Upload File** tab, click **Browse...**.
4. Select the CSV file created in step 1 and click **Preview**. The file is uploaded to the Optimizely server. The **Preview** tab shows the uploaded recipients.

> **Note:** The **Recipient** column must contain recipient IDs. On import, only this column is considered.

5. If email addresses do not display correctly, change the **Character Encoding** option.
6. If the first line of the CSV file contains column names, in the **Skip First Row** list, select **Yes**.
7. Click **Refresh Preview** to check your settings.

> **Tip:** To only unsubscribe recipients, go to step 10. To only delete the recipients, go to step 12.

8. Click **Delete**.
9. In the **Delete Recipients** area, select the **Delete recipients** check box. In the **Recipient Lists** area, select one or more recipient lists from which you want to delete the recipients.
10. Click **Unsubscribe**.
11. In the **Unsubscribe Recipients** area, select the **Unsubscribe recipients from all recipient lists** check box to unsubscribe recipients from recipient lists.
12. Click **Summary**. In the **Summary** tab, all actions to be performed are displayed.
13. To make changes, click the corresponding tab and perform the appropriate steps.
14. Click **Finished**. The recipients are deleted and/or unsubscribed according to your settings. You receive a notification email to your email address once the process is complete.

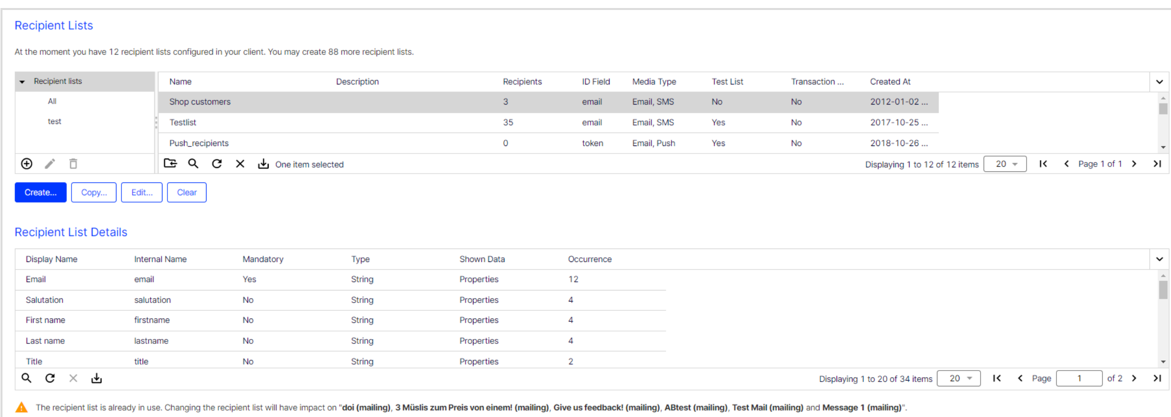
> **Note:** While the process is running, you cannot run a new one.

> **Tip:** You may need to export the data from your recipient database, CRM application or similar. If the source file is not a CSV file or if you want to export the recipient data from your local database or CRM first, ask your IT department for assistance. If the source file is a spreadsheet file, you can convert it into a CSV file. Open the file with your spreadsheet application (for example Microsoft Excel), select **Save as** -> **.csv file** and save it to your local hard drive.

Recipient list management (Beta)

> **Note:** The recipient list management is in beta phase and will be released for all users soon. To use this feature at this stage, contact customer support.

In the Optimizely Campaign menu under **Recipients** > **Recipient Lists**, you can manage recipient lists and recipient list fields. The recipient list overview shows all available recipient lists and the number of recipients in each list. If you select a recipient list, the **Recipient List Details** area provides additional information about the included recipient list fields.



Managing recipient lists

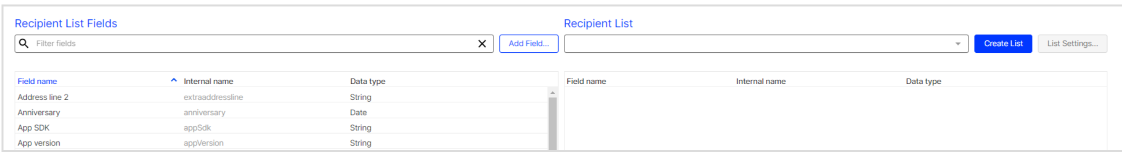
You can create, edit, copy and clear recipient lists.

Creating recipient lists

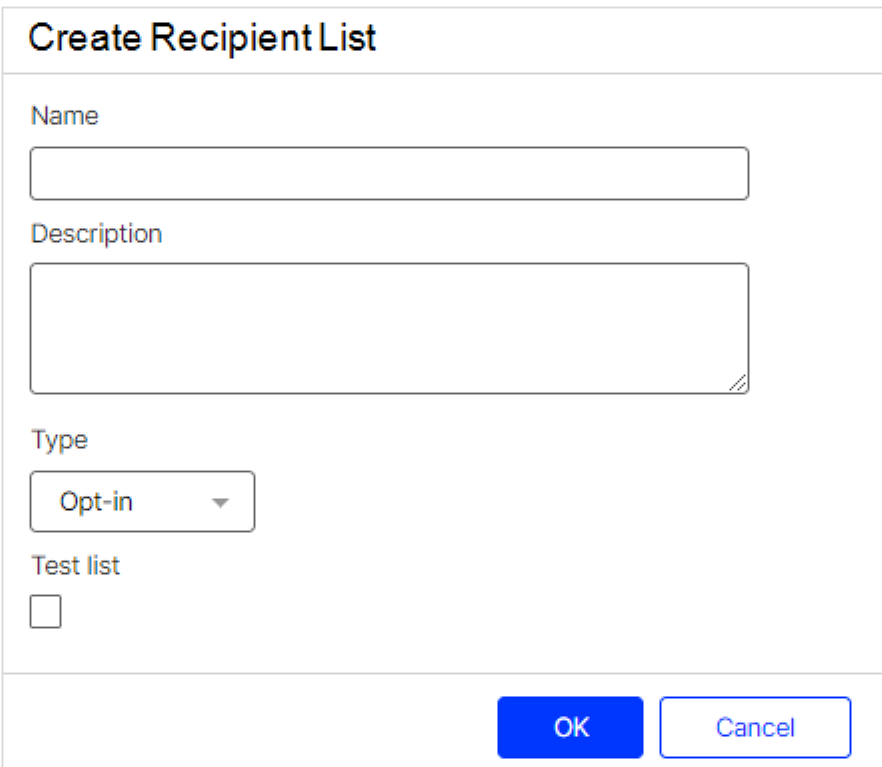
Create a recipient list from scratch or based on an existing recipient list.

New recipient list

1. In the recipient list overview, click **Create...**.
2. Click **Create List**.



3. In the **Create recipient list** dialog box, configure the recipient list.

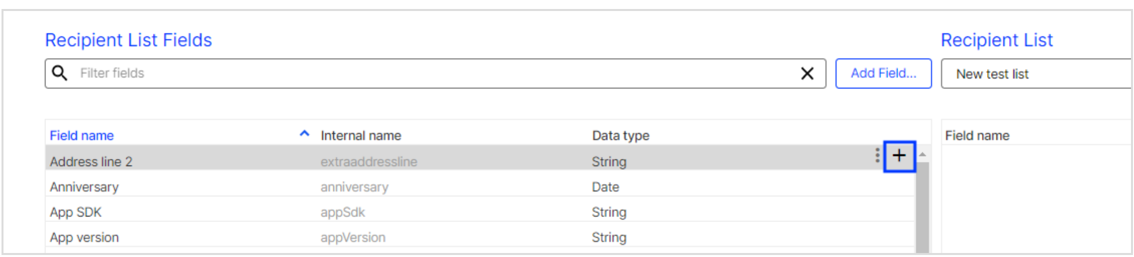


- **Name**. Enter a name for the recipient list.
- **Description**. Optional. Enter a description for the recipient list.

- **Type**. Select one of the following list types from the drop-down list:
  - **Default**. Select the default type if you have already recorded the recipient's opt-in in your system. See Opt-in.
  - **Opt-in**. Select the opt-in type if you want to execute the double opt-in process in Optimizely Campaign as soon as a new recipient is added to the list. See Opt-in processes.
  - **Transaction**. Select the transaction type if you want to use the recipient list for transactional mails. See Transactional mails.
- **Test List**. To set up the recipient list as a test list, select the check box. See Test dispatch.

> **Note:** Do not use real customer data for test lists.

4. Click **OK**.
5. Drag and drop the desired recipient list fields from the left **Recipient List Fields** area into the right **Recipient Lists** area. Alternatively, you can select the recipient list fields and assign them to the recipient list via the context menu or by clicking **Assign Field**.

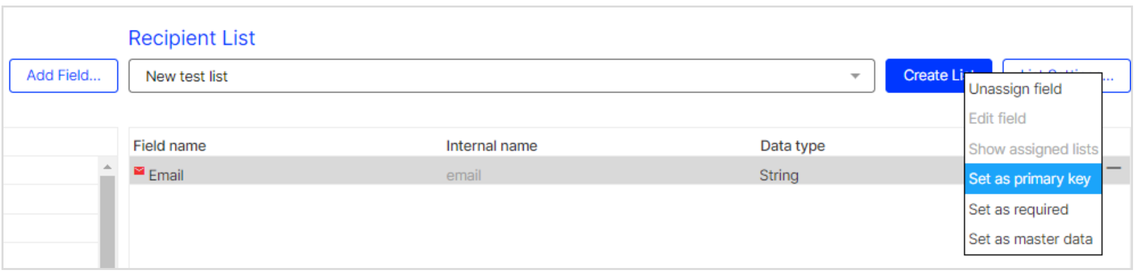


> **Note:** Assign at least one media type recipient list field (marketing channel) to the recipient list.

> **Tip:** You can filter available recipient list fields by typing the name of the recipient list field or part of the name into the search field.

> **Tip:** An eye icon appears after the field name of fields that have different field names in different recipient lists.

6. To create additional recipient list fields, click **Add Field...**. See Creating recipient list fields.
7. Set one recipient list field as primary key by selecting the recipient list field and clicking **Set as Primary Key** in the context menu.



> **Note:** One recipient list field is reserved for the ID of the recipient dataset (primary key) - usually the email address. This recipient list field cannot be changed later. You can also set another recipient list field as primary key instead of the email address, for example, the customer ID.

> **Tip:** A key icon appears after the field name of the recipient list field set as primary key.

8. Optional: Specify which recipient list fields are required by selecting the appropriate recipient list fields in right **Recipient Lists** area and clicking **Set as required** in the context menu. You cannot remove these recipient list fields from the recipient list afterwards.

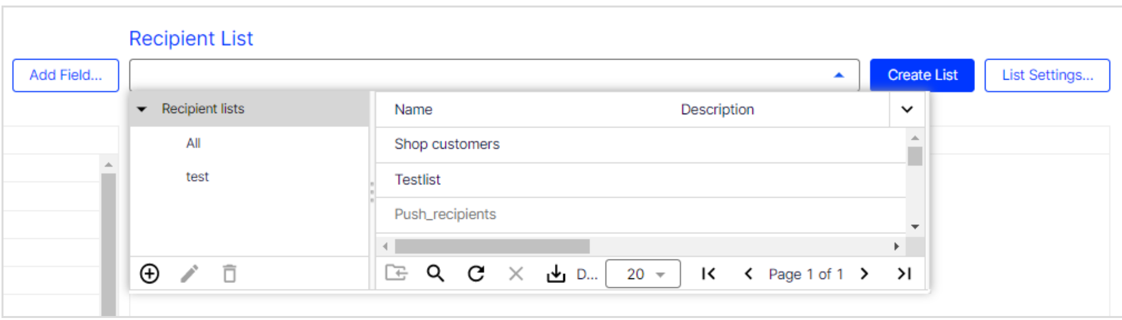
> **Tip:** A lock icon appears after the field name of recipient list fields set as required.

9. Click **Save**.

> **Tip:** You can also create a recipient list by assigning the recipient list fields first and then clicking **Create List**.

Based on existing recipient list

1. In the recipient list overview, click **Create...**.
2. Select a recipient list from the drop-down list.



> **Tip:** You cannot select grayed-out recipient lists.

3. Click **Create list** > **Copy...**.
4. In the **Copy recipient list** dialog box, configure the recipient list.
   - **Name**. Enter a name for the recipient list.
   - **Description**. Optional: Enter a description for the recipient list.
   - **Type**. Select one of the following list types from the drop-down list:
     - **Default**. Select the default type if you have already recorded the recipient's opt-in in your system. See Opt-in.
     - **Opt-in**. Select the opt-in type if you want to execute the double opt-in process in Optimizely Campaign as soon as a new recipient is added to the list. See Opt-in processes.
     - **Transaction**. Select the transaction type if you want to use the recipient list for transactional mails. See Transactional mails.
   - **Test List**. To set up the recipient list as a test list, select the check box. See Test

dispatch.

> **Note:** Do not use real customer data for test lists.

5. Click **OK**.
6. To assign additional recipient list fields to the recipient list, drag and drop the desired recipient list fields from the left **Recipient List Fields** area into the right **Recipient Lists** area. Alternatively, you can select the recipient list fields and assign them to the recipient list via the context menu or by clicking **Assign Field**.

   > **Tip:** An eye icon appears after the field name of fields that have different field names in different recipient lists.

7. To create additional recipient list fields, click **Add Field...**. See Creating recipient list fields.
8. To remove recipient list fields from the recipient list, drag and drop the desired recipient list fields from the right **Recipient Lists** area into the left **Recipient List Fields** area. Alternatively, you can select the recipient list fields and remove them via the context menu or by clicking **Unassign Field** .
9. Optional: Specify which recipient list fields are required by selecting the appropriate recipient list fields in right **Recipient Lists** area and clicking **Set as required** in the context menu. You cannot remove these recipient list fields from the recipient list afterwards.

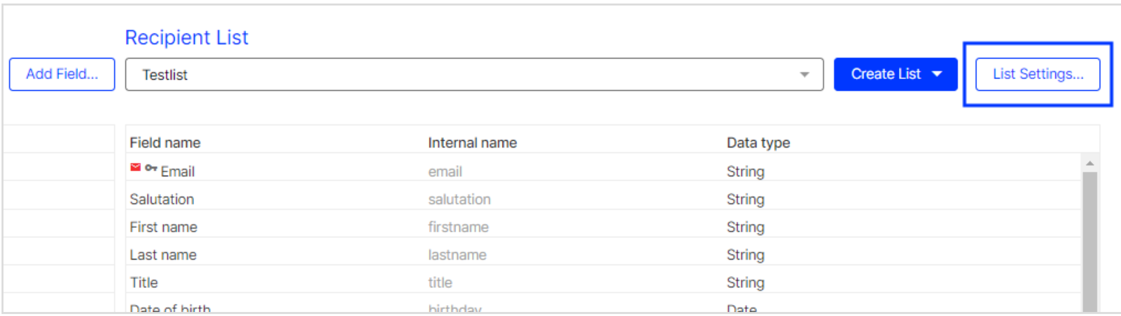
   > **Tip:** A lock icon appears after the field name of recipient list fields set as required.

10. Click **Save**.

Editing recipient lists

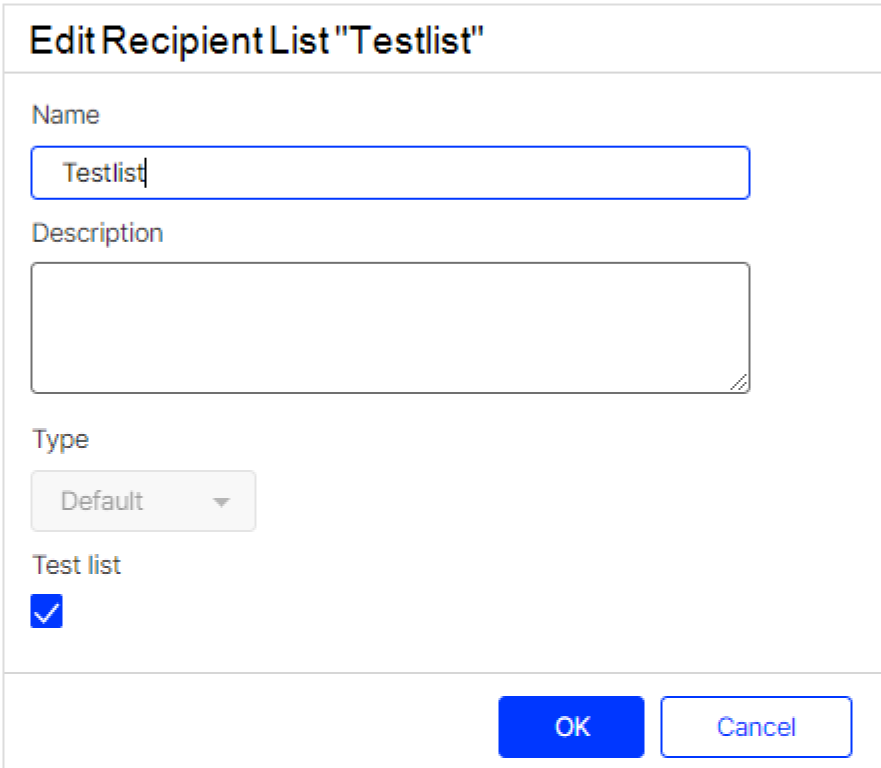
> **Note:** If you change recipient lists, you may have to adjust target groups with recipient-data-based conditions as well as scheduled jobs.

1. Select a recipient list in the recipient list overview.
2. Click **Edit...**.
3. Click **List Settings...**.



4. In the **Edit recipient list** dialog box, configure the recipient list as described under Creating recipient lists.

> **Tip:** You cannot change the list type. Create or copy a recipient list and select a new list type.



5. To assign additional recipient list fields to the recipient list, drag and drop the desired recipient list fields from the left **Recipient List Fields** area into the right **Recipient Lists** area. Alternatively, you can select the recipient list fields and assign them to the recipient list via the context menu or by clicking **Assign Field**.

> **Tip:** An eye icon appears after the field name of fields that have different field names in different recipient lists.

6. To create additional recipient list fields, click **Add Field...**. See Creating recipient list fields.
7. To remove recipient list fields from the recipient list, drag and drop the desired recipient list fields from the right **Recipient Lists** area into the left **Recipient List Fields** area. Alternatively, you can select the recipient list fields and remove them via the context menu or by clicking **Unassign Field**.
8. Optional: Specify which recipient list fields are required by selecting the appropriate recipient list fields in right **Recipient Lists** area and clicking **Set as required** in the

context menu. You cannot remove these recipient list fields from the recipient list afterwards.

> **Tip:** A lock icon 🔒 appears after the field name of recipient list fields set as required.

9. Click **Save**.

Copying recipient lists

1. Select a recipient list in the recipient list overview.
2. Click **Copy…**.

> **Tip:** Only the list structure without recipients is copied.

3. Edit the copied recipient list as described under Editing recipient lists.

Clearing recipient lists

To delete all recipients from a recipient list, select the recipient list in the recipient list overview and click **Clear**. The list itself is not deleted and can be used again.

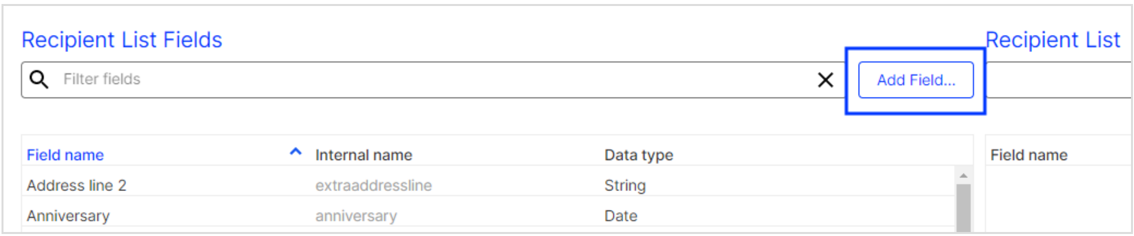
> **Tip:** To delete or unsubscribe multiple recipients from multiple recipient lists, you can use the Cleanup feature.

Managing recipient list fields

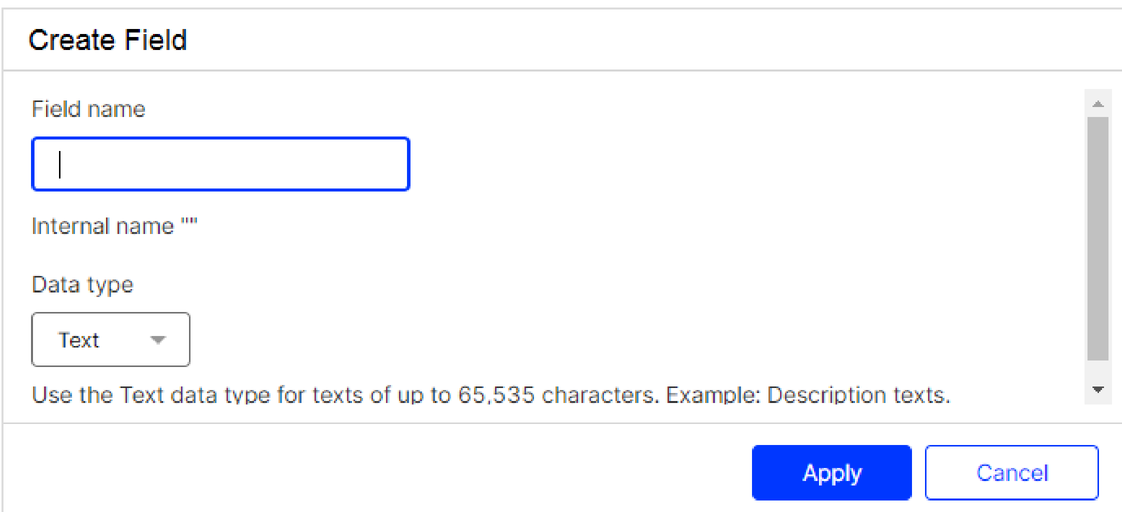
You can create, edit and delete recipient list fields, and show assigned recipient lists.

Creating recipient list fields

1. In the recipient list overview, click **Create...**.
2. Click **Add Field...**.



3. In the **Create Field** dialog box, configure the recipient list field.



- **Field Name**. Enter a name for the recipient list field. The internal name is automatically created from the entered field name.
- **Data Type**. Select a data type for the recipient list field from the drop-down list.
  - **Boolean**. Select the Boolean data type for truth values (*true* or *false*).
  - **Date**. Select the date data type for date and time specifications. For example: *2022-01-01 12:00:00*.
  - **Decimal**. Select the decimal data type for exact decimal numbers, such as prices. For example: *29.99*.

- **Float**. Select the float data type for rounded floating point numbers like the generated revenue. For example: *1.2345*.
- **Integer**. Select the integer data type for small numbers, such as the customer's year of birth. For example: *1984*.
- **Long**. Select the long data type for large numbers, such as the customer ID. For example: *1234567890*.
- **String**. Select the string data type for texts of up to 255 characters. For example: email address or first name.
- **Text**. Select the text data type for texts of up to 65,535 characters. For example: descriptive texts.

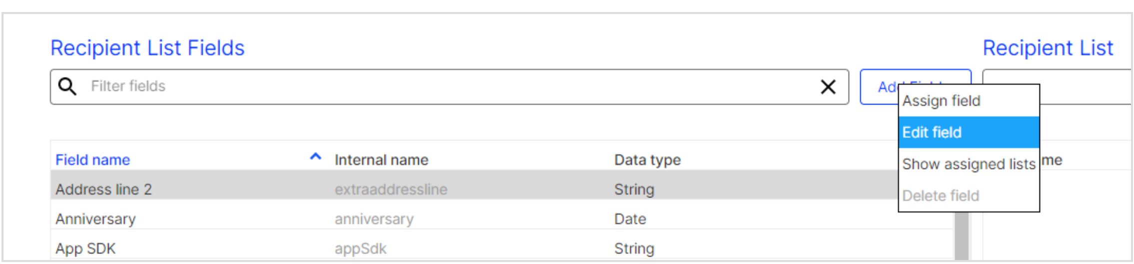
> **Tip:** For more information about the different data types, see Data types.

4. Click **Apply**.

Editing recipient list fields

> **Note:** For assigned recipient list fields, you can only change the field name. The change affects all recipient lists to which the recipient list field is assigned.

1. Select a recipient list field and click **Edit field** in the context menu.

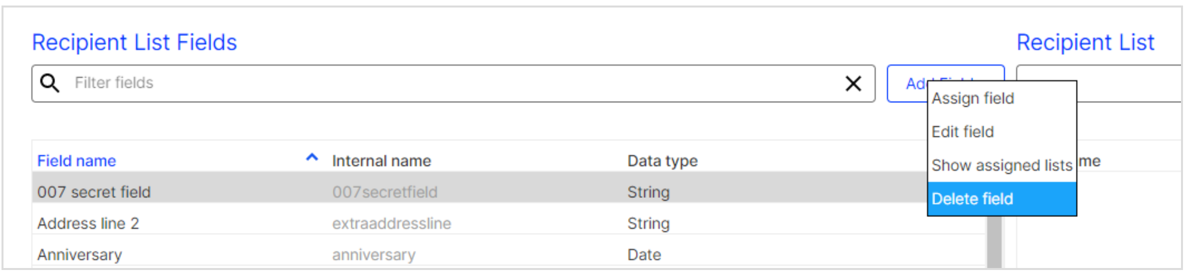


2. Edit the recipient list field in the **Edit field** dialog box as described under Creating recipient list fields.
3. Click **Apply**.

Deleting recipient list fields

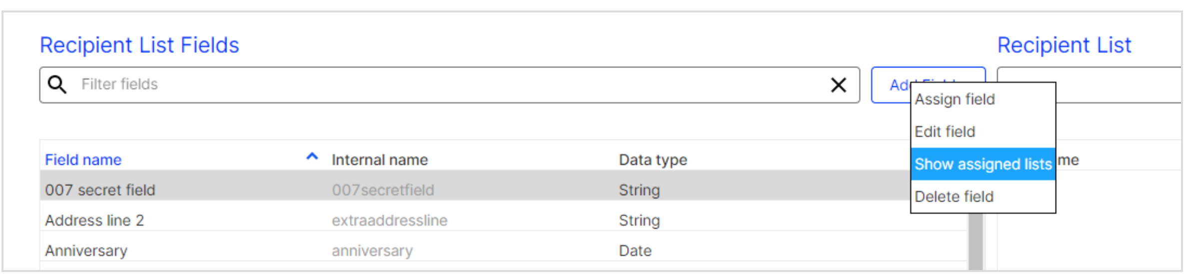
> **Note:** You cannot delete assigned recipient list fields.

To delete a recipient list field, select the recipient list field and click **Delete field** in the context menu.



Showing assigned recipient lists

To show assigned recipient lists, select a recipient list field and click **Show assigned lists** in the context menu.



Separate data storage

> **Note:** To enable this feature, contact customer support.

The additional feature **Separate data storage** lets you restrict the visibility of recipient data for users of a client.

Recipient data

Recipient data is divided into:

- **Master data**. Personal data such as email address and name. Master data is only displayed to users with the appropriate permission. See User management.
- **Properties**. Action-based profile data such as events and sales promotions. Properties are displayed to all users.

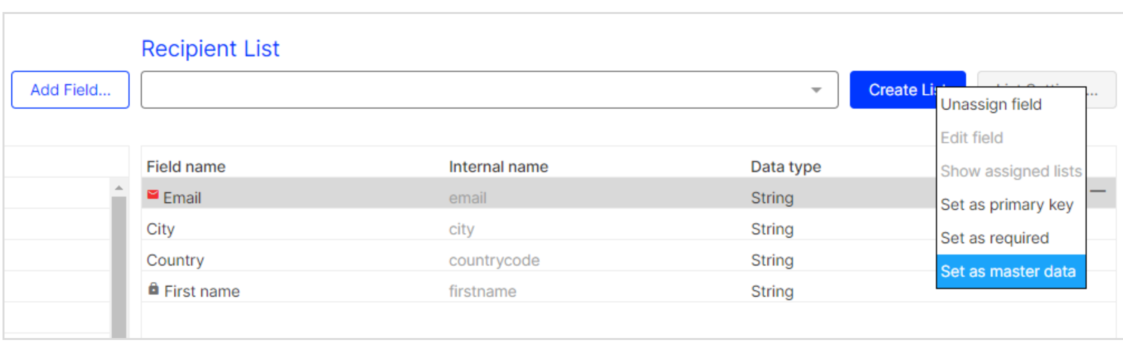
User permissions

The following user permissions are available for viewing recipient data:

- Only **Properties** fields
- **Master data** fields separated from **Properties** fields (so that a user cannot associate properties with a specific recipient)
- **Master data** and **Properties** fields together

Changing the visibility of recipient list fields

1. Select a recipient list in the recipient list overview.
2. Click **Edit...**.
3. Select a recipient list field and click **Set as master data** in the context menu. The respective recipient data is only displayed to users with the appropriate permissions.



> **Tip:** An eye icon appears after the field name of recipient list fields set as master data.

4. To enable the visibility of a recipient list field, click **Set as properties** in the context menu of the recipient list field.
5. Click **Save**.

Data types

The following data types and range of values are permitted for recipient list fields:

<table>
<tr><th>Data type</th><th>Range</th><th>Example</th></tr>
<tr><td>Boolean</td><td>true/false</td><td>Registration via website, interested in promotional newsletters</td></tr>
<tr><td>Date</td><td>date</td><td>Registration date. Supported date formats:

Note: Programming interfaces (APIs) only support date formats according to ISO 8601.

<table>
<tr><th>Date format</th><th>Description</th><th>Example</th></tr>
<tr><td>yyyy-MM-dd</td><td>Date with separator</td><td>2022-05-07</td></tr>
<tr><td>yyyy-MM-dd HH:mm:ss</td><td>Date and time</td><td>2022-05-23 09:50:04</td></tr>
<tr><td>yyyy-MM-dd'T'HH:mm:ss</td><td>Date and time according to ISO 8601</td><td>2022-05-23T09:50:04</td></tr>
</table>
</td></tr>
</table>

Data type	Range	Example		
		yyyy-MM-dd'T'HH:mm:ss,SSS	Date and time with milliseconds	2022-05-24T08:03:59,123
		yyyy-MM-dd'T'HH:mm:ssXXX	Date and time with time zone offset	2022-05-07T12:18:54+02:00 2022-05-07T08:18:54-02:00
Decimal	Decimal numbers with up to 8 places before the decimal point and 2 places after	Price information		
Float	single-precision 32-bit IEEE 754 floating point	Conversion volume, customer score		
Integer	32-bit-signed; -2,147,483,648 - 2,147,483,647	Customer's year of birth		
Long	64-bit-signed; -9,223,372,036,854,775,808 - 9,223,372,036,854,775,807	Customer ID		
String	up to 255 characters	Email address, first name, last name, city, postal code		
Text	up to 65,535 characters	Descriptive texts		

© Optimizely 2022

Target groups

A target group is a subset of recipients defined by specific rules and conditions. Each target group may contain several rules and conditions and a logic relation between them. Use target groups to send a mailing to a predefined group of recipients (such as *recipients in the US*) or to create dynamic content and subject lines. Dynamic paragraphs let you show, for example, different items to male and female recipients. You can use dynamic subject lines to create specific attention even before a recipient has opened the mailing.

You can define a target group using the following classes of conditions:

- **Action-based conditions**. Criteria based on an action or event (such as *click*, *open*) that a recipient has performed. Those conditions apply only after a mailing is sent. An example for an action is: *Recipient has received a specific mailing and has clicked on a specific link in it*.
- **Recipient list-based conditions**. Determines whether recipients are contained in specific recipient lists.
- **Recipient data-based conditions**. Criteria based on any field of the recipient list (such as *City* or *Interest*).
- **Optimizely Campaign-based conditions**. Determines whether recipients are currently passing through or already passed through Marketing Automation campaigns.
- **Target group-based conditions**. Determines whether recipients are contained in another target group.

If your client is configured for post-click tracking, you can track actions that are made on your website. For example, *select recipients who have bought a certain product* from your shop or *have spent a certain amount* in your shop. To configure a target group with post clicks, select **Actions** from the first drop-down list and then **has created one or more post clicks**.

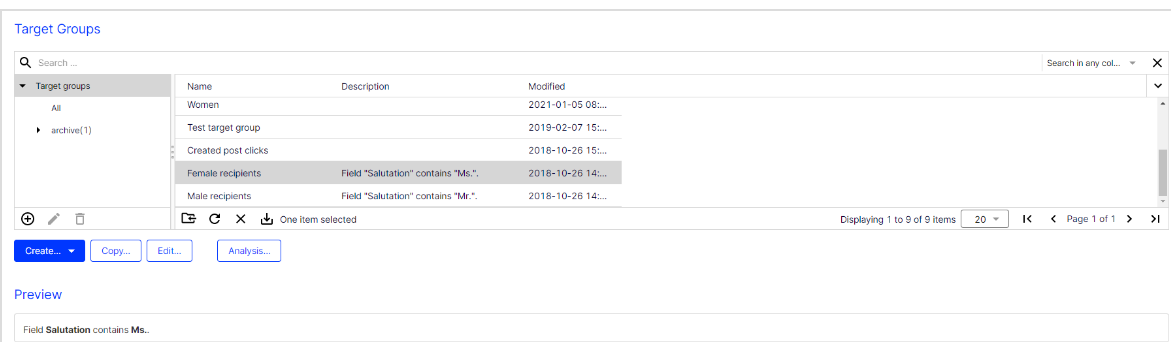
Example: Define a target group that contains *male recipients in the US*. You may now vary this target group by adding further rules, such as *recipients who clicked on a specific link in the last mailing they received*. Use this target group to send a special offer or a promotional email to selected recipients. If you apply the target group to the whole mailing, only the target group receives the mailing. If you apply it to a paragraph, it is shown only to these recipients, while the others receive the regular mailing.

Note: If you want to see the matches of a target group in the recipients overview and the selected target group contains user-based data (for example, user actions), you get an error after clicking **Apply**. Due to data privacy reasons, you are not allowed to analyze a single user's data. When using this target group to send a mailing or to create dynamic content, it will work properly, though.

Tip: You can use segments created in Optimizely Visitor Intelligence as target groups.

Managing target groups

To manage target groups, open the Optimizely Campaign menu and select **Recipients** > **Target Groups**. Existing target groups appears. If you click a target group, its definition appears in the bottom of the window. Every target group definition is made up of one or more rules. For example, *The email address contains "@example.com"* or *The first name is "Mark"*.



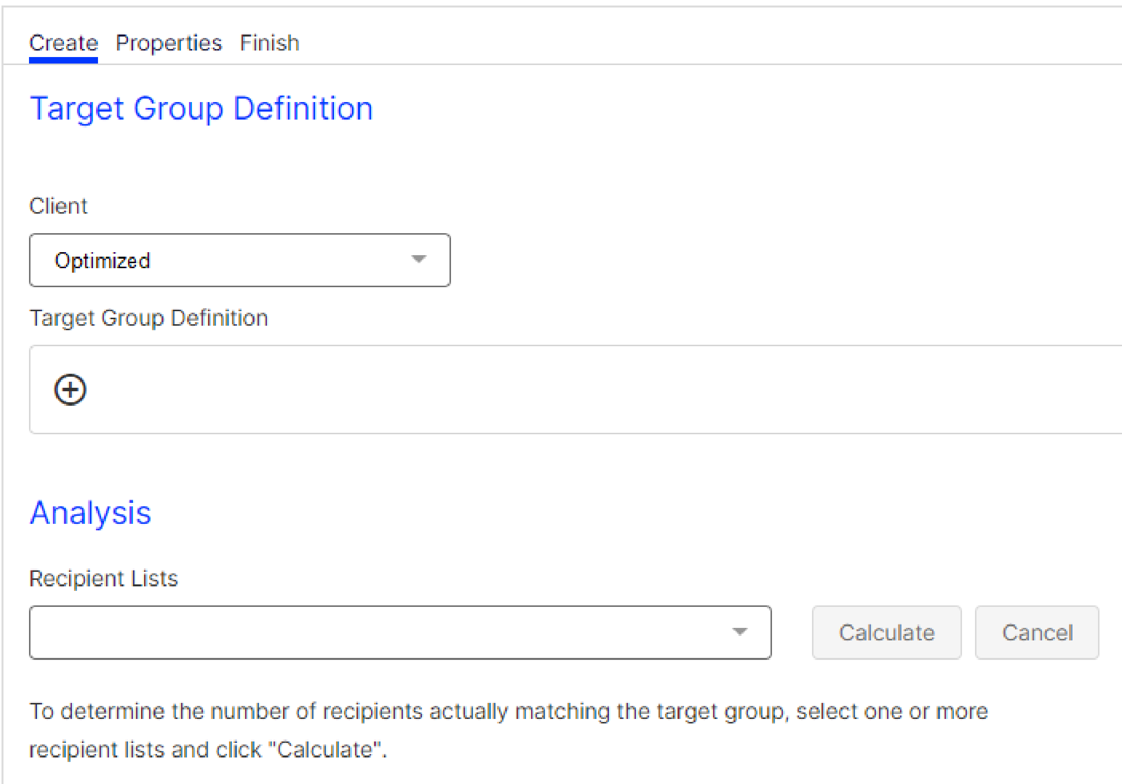
Tip: You can organize target groups in folders.

Creating target groups

You can create a new target group from scratch or based on an existing target group.

New target group

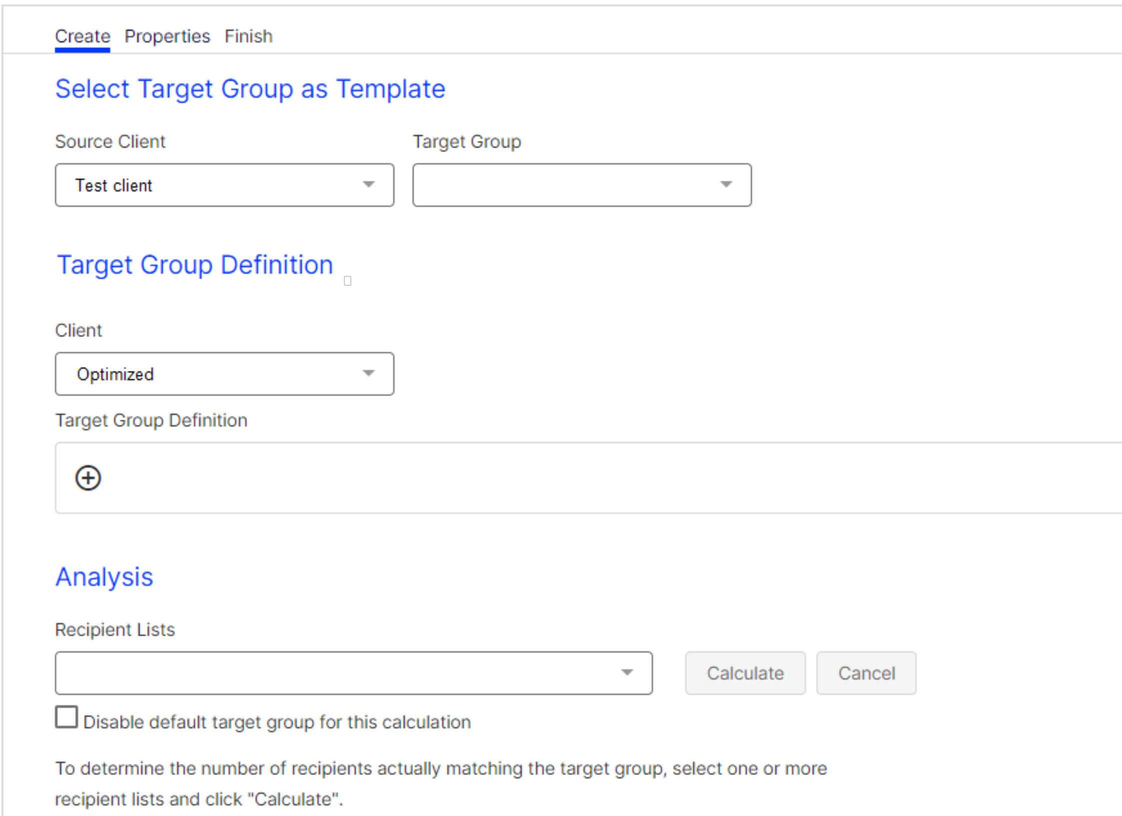
1. Click **Create** > **New...**.
2. In the **Client** drop-down list, select the client for which you want to create a target group.



3. Under **Target Group Definition**, define the rules and conditions for the target group by clicking **+** and performing steps described in Defining a target group.
4. Optionally, you can execute a target group analysis.
5. Click **Properties**.
6. Select the folder where you want to save the target group. See also: Lists and folders.
7. Enter a name and an optional description for the new target group.
8. Click **Create**.

From existing target group

1. Click **Create** > **Copy...**.
2. In the **Source Client** drop-down list, select the client of which you want to use a target group as template.



3. In the **Target Group** drop-down list, select a target group.
4. In the **Client** drop-down list, select the client for which you want to create a new target group.
5. Under **Target Group Definition**, define the rules and conditions for the target group by clicking **+** and performing steps described in Defining a target group.

> **Note:** If you select a different target group template afterwards, the target group definition is overwritten.

6. Optionally, you can execute a target group analysis.
7. Click **Properties**.
8. Select the folder where you want to save the target group. See also: Lists and folders.
9. Enter a name and an optional description for the new target group.
10. Click **Create**.

Copying target groups

1. Select a target group you want to copy and click **Copy...**.
2. In the **Client** drop-down list, select the client to which you want to copy the target group.
3. In the **Target Group Definition** area, define the rules and conditions for the target group by clicking **+** and performing steps described in Defining a target group.
4. Optionally, you can execute a target group analysis.
5. Click **Properties**.
6. Select the folder where you want to save the target group. See also: Lists and folders.
7. Enter a name and an optional description for the new target group.
8. Click **Create Copy**.

> **Note: Recipient field does not exist in target client**
>
> If the target group you want to copy contains a recipient field based on a rule that uses a recipient field that does not exist in the recipient lists of the target client, the respective name of the field is shown like this: *???Name???*. You can still copy the target group. Next, open the target client and select the copied target group. Change the field name by selecting a field from the drop-down list and save the target group.

Editing target groups

1. Select a target group you want to edit and click **Edit...**. The **Edit Target Group** window opens.

2. In the **Target Group Definition** area, edit the rules and conditions or add new ones for the target group. To edit a rule, click it and perform steps described in Defining a target group.
3. Optionally, you can now execute a target group analysis.
4. Click **Properties**.
5. You can change the name or description of the target group, or add and edit rules and conditions.
6. Click **Save**.

Using Optimizely Visitor Intelligence segments as target group

If you have Optimizely Visitor Intelligence on your website, you can use segments as target groups for your campaigns. See Creating a marketing segment for an instruction on how to create a segment in Optimizely Visitor Intelligence based on website visitor profiles. You can then use the created segments in Smart Campaigns and Marketing Automation.

See Using marketing segments as target groups for mailing campaigns in the Optimizely User Guide.

Target group definition

When creating a new target group, the **Target Group Definition** area is empty, except for a plus icon **+**.

1. Click **Add +** and, in the very left drop-down list, select whether you want to create a negative condition. Select **Not** if the criteria you define for it is false. To create a positive condition, leave this first drop-down field blank.

   > **Note:** Sometimes you want to formulate rules in a negative fashion. Select the **not** option from the first drop-down list while creating a rule. For example, to find recipients not from Berlin, the rule would be: *not Recipient list field "Location" is equal to "Berlin"*.

2. In the next drop-down list, select whether you want to create an **action-based**, **campaign-based**, **recipient list-based**, **recipient data-based** or **target group-based** condition.

As another option, you can use the parentheses to hierarchically handle more complex definitions. Rules within parentheses are applied first and then the rules in the second level and so on. Use AND or OR logic relations between two conditions. To change the type of relation, click it. Due to correctness and logical unambiguousness, target groups without parentheses can only contain one type of logic relation. Thus, if you click a relation, relations between the rules are changed. If you want to use different types of logic relations, use parentheses as in the following example.

Example

You are looking for recipients located in *Berlin* or *Hamburg* and with email accounts at *example.com*.

(Recipient location equals Berlin OR Recipient location equals Hamburg) AND email address contains @example.com

The parentheses makeOptimizely Campaign select recipients from *Berlin* or *Hamburg* first. Then out of this subset, recipients with an *example.com* email account are selected.

> **Tip:** Use drag-and-drop to sort rules and conditions or put them into parentheses. If you hover over a rule, a context menu appears on the right side. Click **Add +** to add a new condition at a specific position; click **Remove —** to delete a condition. The **Copy** symbol creates a copy of a condition.

Defining target groups based on recipient data conditions

If you selected **Recipient list field** in the second drop-down list, the following drop-down list shows fields from your recipient list. Select the field you want to query, such as **ZIP code**.

Depending on the type of field, in the next step you can select an operator. The operator compares the content of the selected recipient field with a targeted value. The following table shows all available operators. You complete other rules by entering a matching value in the last field.

Operator	Data field type
is equals to	String, numeric field, date field, boolean
is not equal to	String, numeric field, date field, boolean
is greater than	Numeric field, date field
is greater than or equal to	Numeric field, date field
is less than	Numeric field, date field
is less than or equal to	Numeric field, date field
is one of the following values	String, numeric field See Multiple values.
contains	String
begins with	String
ends with	String
empty/unknown	String, numeric field, date field, boolean See Empty fields (NULL values).
is not empty/unknown	String, numeric field, date field, boolean See Empty fields (NULL values).
in exactly X hours	Date field
in exactly X days	Date field
is anniversary	Date field Compares the day and month of the date field entry with the current day and month so you can filter recurring events such as birthdays and anniversaries.

© Optimizely 2022

Operator	Data field type
is anniversary in exactly X days	Date field
was exactly X days ago	Date field
was less than X days ago	Date field
is more than X days ago	Date field
was lass than X months ago	Date field
is more than X months ago	Date field
Month is current month	Date field Compares only the month of the date field entry with the current month.
Day is current day	Date field Compares only the day of the date field entry with the current day. However, this does not mean **today** because all dates that have the same day, will match.

Note: Comparing date field entries

The following conditions let you compare date field entries to consider time periods prior to today:

- was exactly X days ago
- was less than X days ago
- is more than X days ago
- was lass than X months ago
- is more than X months ago

> **Example 1:** *2022-01-01 was exactly 5 days ago.* If today was 2022-01-06, the condition would apply.
>
> **Example 2:** *2022-01-01 is more than 5 days ago.* If today was 2022-01-07, the condition would apply.
>
> **Example 3:** *2022-01-01 was less than 5 days ago.* If today was 2022-01-05, the condition would apply.

Action-based conditions

If you selected **Action** in the second drop-down list, you can define the rule through recipient-specific actions or events (such as opens, clicks).

The following actions are available:

Action	Description
generated a hard bounce	Recipients who have generated a hard bounce. In the **Mailing** drop-down list, select either all mailings, mailings of a specific type or specific mailings.
generated a soft bounce	Recipients who have generated a soft bounce. In the **Mailing** drop-down list, select either all mailings, mailings of a specific type or specific mailings.
clicked a link	Recipients who have clicked one or more links. Select a time period, the desired mailings, and the corresponding links. In the drop-down list **Count** you can define the number of clicks on a link (exact value or minimum number, optionally with upper limit).
clicked links of click profiles	Recipients who have made a certain number of clicks in a selected click profile. Select a time period and the desired mailings. You can select the number of clicks and the desired click profile in the drop-down list **Clicks**.
received mailing	Recipients to whom a mailing was sent, which means that

Action	Description
	the subscriber is not unsubscribed, blocked, or out-bounced. Note that a recipient matching this criterion can still create a hard or soft bounce. To exclude these recipients, create the target group as follows: *has received mailing AND has NOT created soft/hard bounce.* **Note:** If you use Mailings Classic, please see the note in the FAQs.
opened mailing	Recipients who have opened mailings one or more times. Select a time period and the desired mailings. In the **Count** drop-down list you can define the number of openings (exact value or minimum number, optionally with upper limit).
responded	Recipients who have responded to mailings. Select a time period and the required mailings.
created one or more post clicks	Recipients who have created one or more post clicks.

> **Note: Relative time period filter**
>
> In most action-based filters, you can select the **Period** filter **Within the last...** *n* **Hours/Days**. The relative time period filter takes into account the time span from the time of the calculation to the last relevant time stamp and calculates *n* further days/hours back from there. Example: The period filter *Within the last 1 hours* takes into account the currently started hour plus the last full hour. The highest possible time value of this filter is 119 min 59 s.

Selecting a mailing

From the **Mailing** drop-down list, select one or multiple mailings for the target group definition.

> **Note:** Select only sent mailings. If you select, for example, paused, canceled or incomplete mailings, you cannot use the target group definition.

- **All mailings**. All sent mailings.
- **Mailings of type**. All sent mailings of a specific type:
  - **Regular**. Optimized mailings of an A/B test (Smart Campaigns) and mailings from Mailings Classics (deprecated).
  - **Special**. Transactional mails.
  - **Transactional message**. Split mailing of a transactional mail. See A/B test for transactional mails.
  - **Confirmation email**. Confirmations.
  - **Split**. Split mailings from Mailings Classics (deprecated).
  - **Campaign**. Mailings and split mailings of a Smart Campaign (without optimized mailings).

  > **Tip:** To select all mailings of an A/B test in a Smart Campaign, select both options **Regular** (to select the optimized mailing) and **Campaign** (to select the split mailings).

- **The following mailings**. Select one or multiple mailings from the list.

Post click conditions

If post-click tracking is configured for your client, actions that a recipient does on your website are tracked. You can create target groups using the post-click data, for example, from select recipients who have bought a certain item in your web shop.

You can track post-click data using the proprietary Optimizely Campaign post-click tracking or a full-featured web analytics software. Optimizely maintains partnerships with several vendors, for example, Adobe, Webtrekk, Econda, Google Analytics and eTracker. If you are interested in this option, contact your Optimizely account manager.

To create a target group with post-click data, perform the following steps:

1. In the second drop-down list, select **Action** and in the following drop-down list, select **has created one or more post clicks**. The input mask changes according to the post-click setup of your client.
2. If you use more than one post-click or web analytics service, select the one you want to use from the **Service** drop-down list.

   > **Tip:** The internal Optimizely Campaign post-click tracking is called **default**. If you use only one service, this drop-down list will not appear when creating the target group. The service is displayed, though when you save the target group condition.

3. In the **Mailing** list, you can select post clicks that are created through a designated mailing. If you leave this selection empty, any mailing, or no mailing at all, respectively, is taken into account.

   > **Tip:** Post-click data that were not created through a mailing can be processed only if they carry a user ID identical to the recipient ID within Optimizely Campaign. Therefore, the ID your customers use when logging in to your web shop should be the same as the recipient ID used in Optimizely Campaign. Usually, the email address is used as recipient ID. New customers and customers that do not want to receive promotional emails can also receive system emails (such as order confirmations) via Optimizely Campaign. If customers register for your newsletter, their post-click data is completely available.

4. To delimit post clicks to a period or date, select a type in the **Period** field and enter a date or a number of days in the calendar interface. The following scenarios are available:
   - **No restrictions**. Post-clicks are not delimited by time.
   - **From ... until ...**. Post-clicks must be created in the designated period.
   - **On ...**. Post-clicks must be created on a designated date.
   - **Not on ...**. This scenario excludes the selected date.
   - **After or on ...**. Post-clicks must be created on the selected date or later.
   - **Before or on ...**. Post-clicks must be created on the selected date or earlier.

- **Older than … days**. Post-clicks must be created X days ago or earlier.
  - In regular mailings, the time range is calculated from the sending date.
  - In system mailings, the time range is actualized every day.
- **Exactly … days ago**. Post-clicks must be created exactly X days ago.
  - In regular mailings, the date is calculated from the sending date.
  - In system mailings, the date is actualized every day.
- **Within the last … days**. Post-clicks must be created within the last X days.
- **Within the last … months**. Post-clicks must be created within the last X months.
- **Today**. Post-clicks must be created on the current day.
  - In regular mailings, this day is the sending date.
  - In system mailings, an actualization is made every day.
- **Current month**. Post-clicks must be created in the current month.
  - In regular mailings, this is month in which the mailing is sent.
  - In system mailings, an actualization is made every day.

5. Select a category.

   > **Tip:** You can define categories individually and contain a string (such as *product name*) or a float value (such as *revenue*). You can combine several categories in one target group condition and therefore select recipients who have bought product A and B or have bought products from group X for more than 500 dollars. By combining several post-click categories you may create recipient segments for discounts, cross- and up-selling offers, and so on.

6. If the selected category is a string, you can select one of the following operators from the list:
   - **equals**
   - **does not equal**
   - **contains**
   - **is empty/unknown**
   - **is not empty/unknown**

- **starts with**
- **ends with**

7. Enter the identifier in the field next to the operator.

   > **Tip:** The automatic completion function helps you to exactly match the name you are looking for. By default, the automatic completion shows the first ten or fewer matches.

8. If the selected category is a float value (for example, a product price), you can select one of the following operators from the drop-down list:

   - **equals**
   - **does not equal**
   - **is greater than**
   - **is less than**
   - **is less than or equals**
   - **is greater than or equals**

   Optional: To aggregate post-click values, select one of the following operators from the drop-down list that appears to the left:

   - **one occurence in**
   - **sum of**
   - **average of**
   - **number of**

9. In the field next to the operator, enter a value.

   > **Note:** When the selected operator is **equals**, the entered value must match exactly the value given by the system, including decimal places. Follow the instructions for entering multiple values.

10. Click **Apply**.

Recipient list-based conditions

If you selected **Recipient list** in the second drop-down list, the system checks whether recipients are contained in a recipient list. Perform the following steps:

1. In the **Recipient list**, click a recipient list.
2. To add the condition to your target group, click **Apply** ✓ .

> **Note:** Optimizely Campaign identifies recipients by recipient ID, usually the email address. If you are using custom recipient IDs (that is, no email addresses), you have to select recipient lists that use the same custom recipient IDs.

Campaign-based conditions

If you selected **MA campaign** in the second drop-down list, the system checks whether recipients are currently passing through or have already passed through a specific Marketing Automation campaign. You can select multiple campaigns for this condition also:

1. In the drop-down list, select **has passed through MA campaign X** or **is currently passing through MA campaign X**.
2. In the following drop-down list, select one or more campaigns.
3. To add the condition to your target group, click **Apply** ✓ .

Target group-based conditions

If you selected **Target group** in the second drop-down list, the system checks whether recipients are contained in a target group. Perform the following steps:

1. In the drop-down list, select **Recipient matches target group X**.
2. In the following drop-down list, select the desired target group.
3. To add the condition to your target group, click **Apply** ✓ .

Use this condition to add target groups that are used many times (such as **Men**, **Women**, ...) as a component to other, more complex target groups. Thus, you only have to define these component target groups once and can reuse them whenever they are needed.

> **Note:** When defining target groups with a target group-condition, take care that they do not exclude each other reciprocally. For example, the target group you want to create matches recipients from the Greater London area. To do so, you define a condition that matches the respective postal codes. If you add a target group-based condition to this target group matching recipients from Northern England, these two conditions would exclude each other reciprocally and there would be no matching recipients in this target group.

Selecting multiple values

If you select **is one of the following values**, you can enter multiple values in one text box. For example, if you want to copy values from a CSV file:

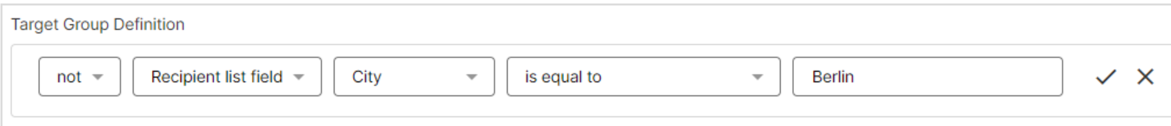
1. Select the operator **is one of the following values**.
2. Enter the values, for example, comma-separated.
3. Open the drop-down list, click the scissors symbol (**Separate multiple values**) and in the box, enter the used delimiter symbol.
4. Click **Apply**. The entered values are now handled as single values.

Managing empty fields

There are generally three types of fields.

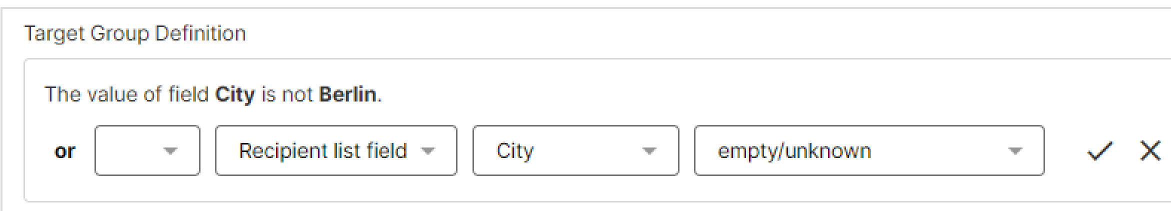
- Fields which contain a value (Place of residence = "Berlin")
- Fields which contain no value and are empty (Place of residence = "")
- Fields which are unknown (Place of residence = unknown)

For example, if you acquired additional newsletter subscribers through an external action (such as a sweepstakes) and imported these into your recipient list, some will not contain information for *Place of residence*. If you want to select recipients in your target group who do not live in Berlin, the condition would be as follows:



With this, recipients are selected who have entered a place of residence other than Berlin (such as Boston). However, the rule does not consider null values (unknown or no place of residence) because the Optimizely Campaign logic assumes that it cannot be determined whether the recipient resides in Berlin or not.

However, with another rule, you can modify the target group so that recipients whose places of residence are unknown are also selected. To do this, add the rule .*Recipient list field "City" is empty/unknown* and link both rules with **or**:



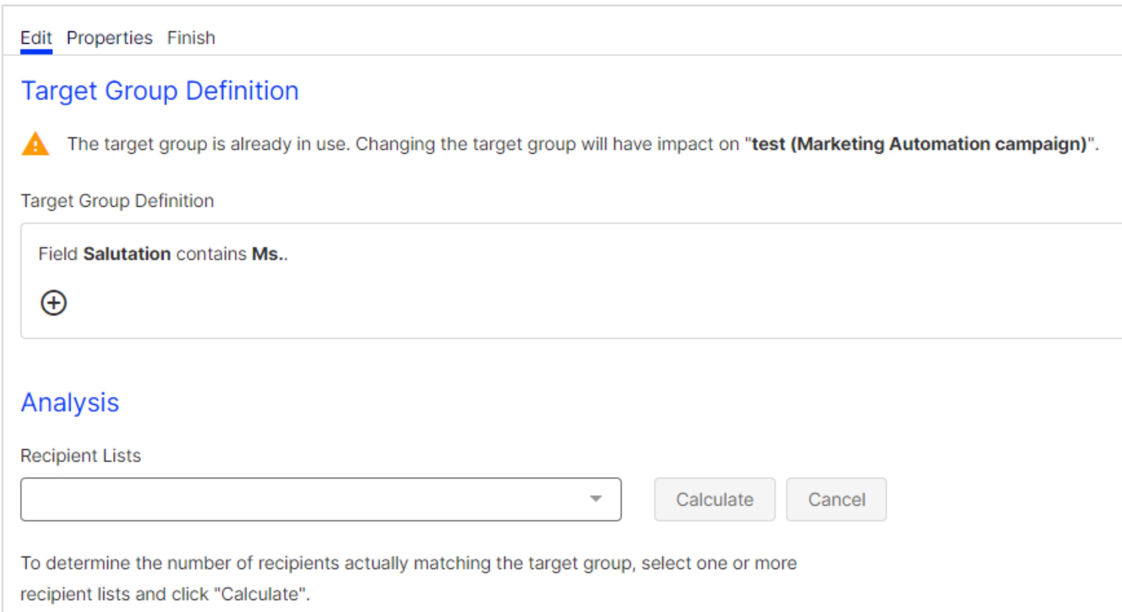
Thus, you include recipients without an explicit place of residence by using the query **is empty/unknown**.

Target group analysis

The target group analysis lets you check a target group for correct functionality. You can check how many recipients from recipient lists the target group definition matches. You can also change the definition, if necessary, before sending the mailing.

1. Open the Optimizely Campaign menu and select **Recipients** > **Target Groups**.
2. Select a target group and click **Analysis...**.
3. In the **Recipient List** drop-down list, select one or more recipient lists for which you want to perform the target group analysis.

Note: Ensure that all selected recipient lists have at least one media type in common. If several lists with more than one media type in common are selected, then select which media type represents the marketing channel. For example, if you want to send emails, then select the media type **Email**.



4. If you use a default target group but you do not want this to be included in the calculation, select **Disable default target group for this calculation**.
5. Click **Calculate**. The calculation is started in the background. If the analysis is completely calculated, the graphical analysis is displayed.

   The analysis contains the following information:

   - **Recipients**. Displays all recipients of the selected recipients lists that match the target group. The recipients are sorted by the following categories:
     - **ready**. Matches the target group and ready for dispatch. You can send mailings to these recipients.
     - **bounced**. Matches the target group but is not ready for dispatch, because they are too many bounces.

  - **blocked**. Matches the target group but is not ready for dispatch, because they are blocked.
  - **unsubscribed**. Matches the target group but is not ready for dispatch, because they are unsubscribed.
- **Recipient Lists (Ready)**. Displays the number of recipients of the corresponding recipient lists that match the target group and can send a mailing to; recipients that create too many bounces, that are blocked, or unsubscribed are not taken into account here.

> **Tip:** If you want to change the target group, because it does not match the desired number of recipients, edit the definition and perform the analysis again.

6. If the *Example recipients* feature is enabled in your client, after the analytical calculation you can display sample recipients (up to 100 datasets) that meet the target group definition. To do so, click **Example recipients**. A window with up to 100 sample recipients opens.

> **Note:** To enable the *Example recipients* feature, you need the consent of your recipients to view and use personal data. If you have this consent, complete a declaration of release for the use of personal tracking data, sign it, and send it to customer support. This form is available from customer support.

Counting recipients in several lists and list order

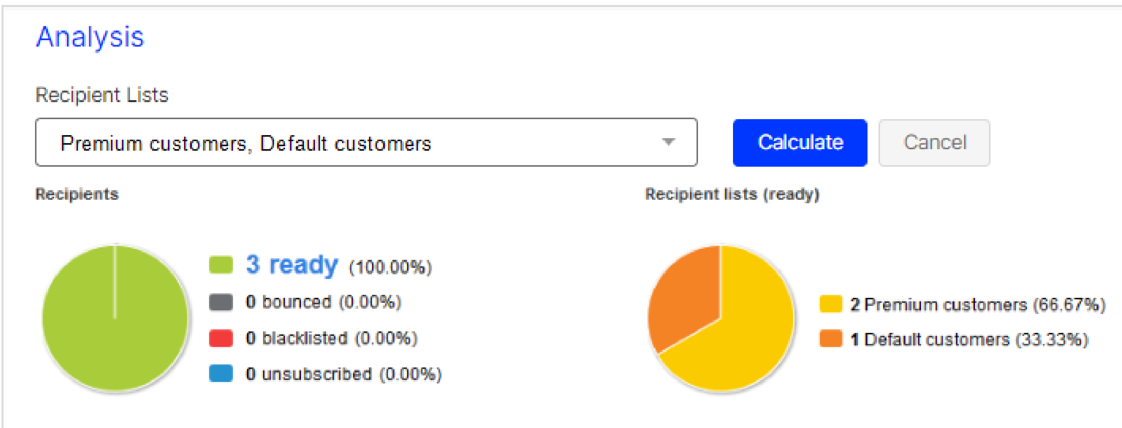
If a recipient is contained in several recipient lists, the recipient is counted only once. The order of the recipient lists is crucial for the final result, too.

Example:

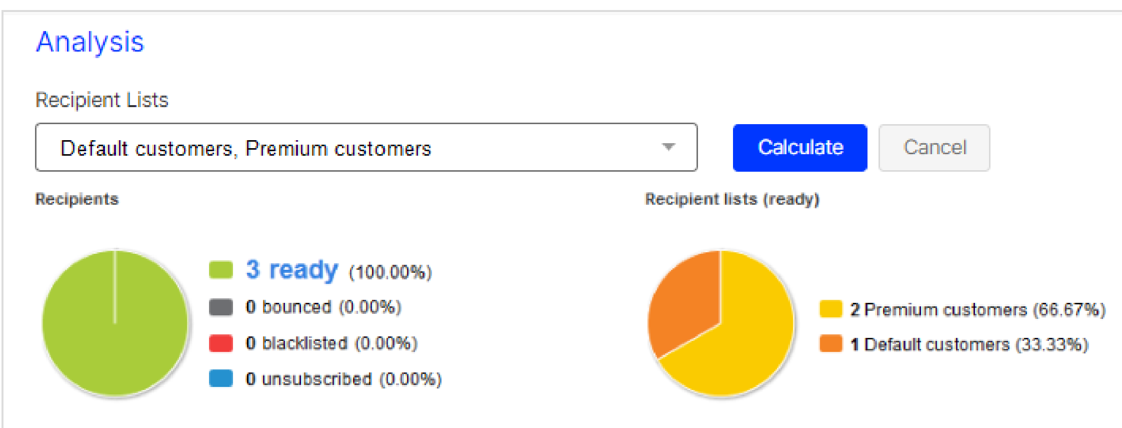
- Recipient list **Premium customers** with a total of four recipients: Peter Marston, Mark Smith, Lea Harris, Sarah Howard
- Recipient list **Default customers** with a total of four recipients: Peter Marston, Mark Smith, Julia Green, Sarah Howard

Perform the following steps:

1. Create a target group *women*.
2. First, select the recipient list **Premium customers** and then the recipient list **Default customers**. On the left, the analysis shows that mailings can be sent to only three recipients (Lea, Sarah, Julia); the recipient Sarah Howard is contained in both recipient lists so is listed once. On the right, two recipients (Lea, Sarah) of the recipient list **Premium customers** and one recipient (Julia) of the recipient list **Default customers** match the target group:



3. Swap the order of the two recipient lists and perform the analysis again. The two recipients (Julia, Sarah) of the recipient list **Default customers** and one recipient (Lea) of the recipient list **Premium customers** match the target group:



Also, you can use the target group analysis to evaluate your recipient lists. For example, you can quickly get the number of women contained in your recipient list. To do so, create the target group definition *The value of the field Salutation equals Mrs.*

and perform a target group analysis for a recipient list. However, perform such evaluations only on single recipient lists because recipients that are contained on multiple recipient lists are only counted once (as described above).

Opt-in

The opt-in method forms the basis for operating legally compliant email and omnichannel marketing campaigns. An opt-in method requires recipients to give a sender explicit permission to send them advertising mails. For this, the recipient:

- actively agrees to receiving advertising emails by, for example, ticking a box, or
- separately states that this acceptance relates solely to the receipt of advertising emails, or
- agrees to a declaration that clearly defines the scope (Who is the advertiser? What is being advertised? How often?).

This topic provides detailed information about the opt-in procedure and the double opt-in to ensure you have evidence that permission was given.

> **Note:** The following information is not legally binding.

Legal basis

In accordance with paragraph 7, section 2 UWG (the German Unfair Competition Act), sending advertising emails to consumers without their prior express consent is considered an unreasonable nuisance and unfair competition.

To protect consumers from receiving unwanted email (spam), legally compliant email and omnichannel marketing are based on permissions. The sender must have the consumer's consent to receive emails (for example, newsletters).

If a recipient has given permission via an opt-in method, the sender has valid proof of consent in the event of a complaint by the recipient.

Should legal action arise, the opt-in must be demonstrable in a court of law. Precise version management of the opt-in processes is advisable for use in practice.

© Optimizely 2022

Exceptions

Transactional mails do not generally require an opt-in. For example, registration and order confirmation emails may be sent without an opt-in. However, this only applies if the transactional mails do not contain additional advertising.

Omnichannel marketing: Separate opt-ins

In accordance with mandatory documentation requirements of data protection legislation, ensure that you collect and record a separate opt-in for each advertising medium (telephone, text message, email and so on).

The opt-in text must exclusively seek consent for sending promotional material and – as opposed to generic "general consent" for types of advertising – the text must precisely describe the promotional materials. For example, you should differentiate between a regular newsletter and a reminder message that is sent when a customer does not respond to an offer.

Validity of the permission

An opt-in may expire as established by current case law. This is generally be the case if you do not contact a recipient for over one year. The previously given consent will no longer apply if you begin contacting the recipient again after this period.

To prevent opt-ins from expiring, contact recipients regularly.

Opt-in method types

- Double opt-in method

  > **Note:** Optimizely recommends the use of this opt-in method.

  The double opt-in method is a procedure in which the end user consents to receiving emails from the sender before any promotional emails are sent. Recipients receive an email with a double opt-in link, which they must click to confirm their newsletter registration.

Their addresses are only added to the recipient list after they click the link. This method is intended to ensure that end users are not signed up for services against their will by third parties. This not only aggravates the end users but also forces them to tediously unsubscribe from the services.

Reasons to useOptimizely Campaign to manage double opt-ins

- The entire process is managed from a single source.
- Almost the entire subscription process can be managed by a single system.

By comparison, managing the process using an external system requires recipient data to be synchronized and/or imported prior to every dispatch, which is a lot more work.

- Single opt-in method

> **Warning:** Optimizely does not recommend use of this opt-in method.

Using the single opt-in method, an end user agrees to receive emails from the sender. Their email address is then entered into the recipient list. Unlike the double opt-in method, confirmation links are not sent. From a legal standpoint, the single opt-in method is not recommended because it cannot be assumed that recipients have entered their email addresses into the recipient list themselves.

- Confirmed opt-in method

> **Warning:** Optimizely does not recommend the use of this opt-in method.

In the confirmed opt-in, an end user agrees to receive emails from the sender. The recipient receives an email confirming that their data is recorded, and that they will receive newsletters by email. This method suffers the same problems as the single opt-in method, except that the recipients are directly informed that their data was entered into a recipient list.

Implementing the double opt-in method with Optimizely Campaign

Setup

With the Optimizely Campaign Opt-in processes feature you can create and manage opt-in processes and its confirmation mailings (opt-in emails). The opt-in email for the double opt-in method must include the double opt-in link. The double opt-in link refers to the confirmation page, which is provided by Optimizely or hosted by you.

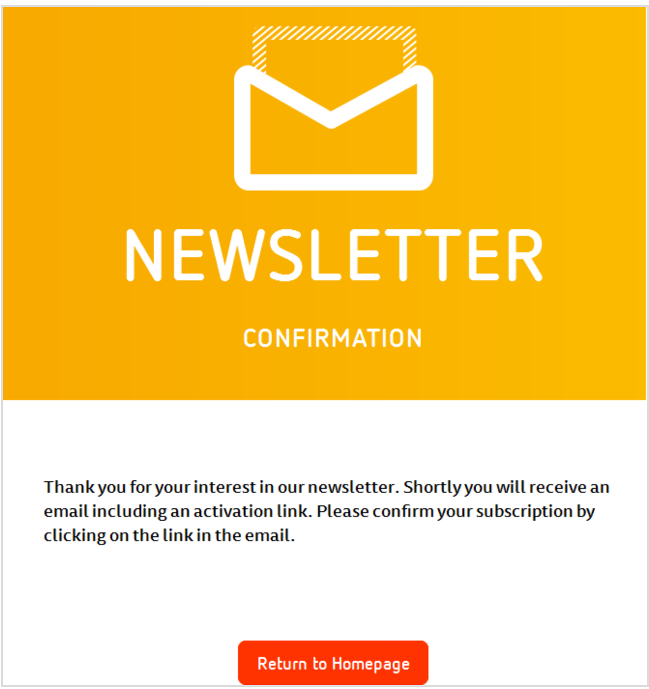
Insert the `{Double Opt-in Link}` field function into the mailing text or add it to the HTML code, for example `<p>To confirm your newsletter subscription, click the following link: <a href="{Double Opt-in Link}">Confirm subscription</a><p>`.

Adapting your website

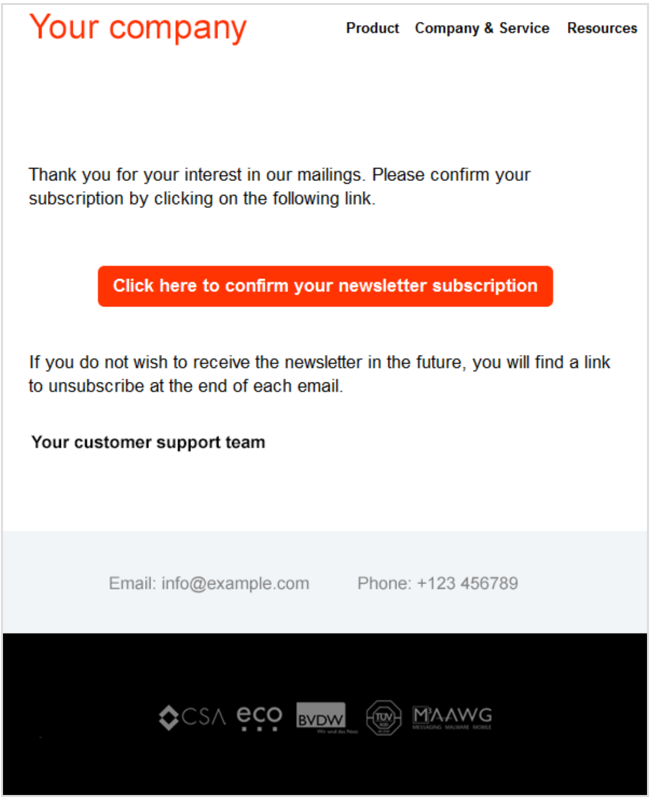
In the next step, you update your website so that the opt-in process you set up is initiated when a new recipient subscribes to the newsletter using the form. If you are using the REST API, you can add one or multiple recipients to a recipient list. You can also set up the connection using the add2 or addAll3 methods, using the SOAP API, or using the subscribe operation in the HTTP API. The opt-in process IDs required for this are available in the API overview.

Examples

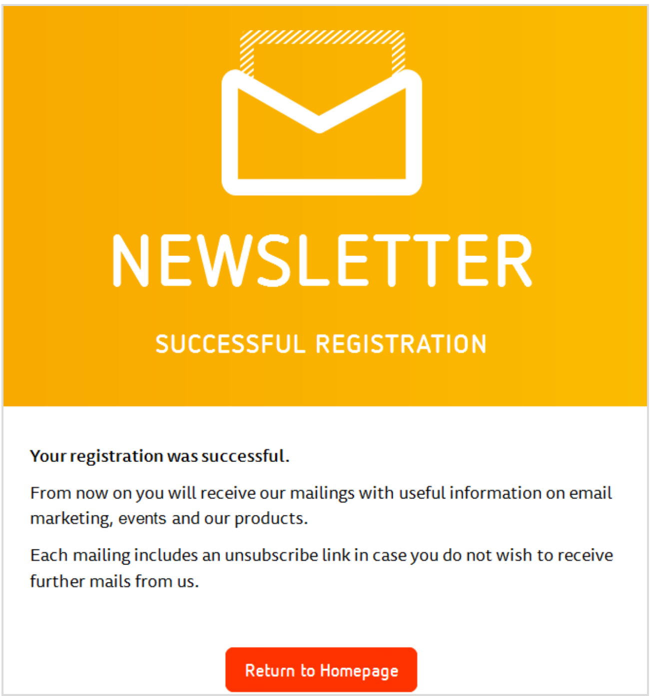
Newsletter subscription



Confirmation email



Confirmation page



Frequently asked questions about the double-opt-in method

1. How do I explain the additional steps to new subscribers when they sign up for the newsletter?

- **Information**. After new subscribers enter their information, clearly inform them that an additional step is required to activate the newsletter subscription ("We have added your email address to our list. To activate … "). Explain why this step is necessary. For example, "to prevent other people from subscribing using your email address" or "to validate your email address".
- **Link**. Instruct recipients to activate their subscription after entering their information. If possible, provide a link to their mailbox for activating the subscription. You can use the domain parts of the email address to determine which email provider the recipient is using and to create a link to the specific service. Example: If the new subscriber has an xxxx@example.com address, then you can display a "Go to my email inbox" link that takes them to the login page at www.example.com.

- **When to send the confirmation email**. You should send the confirmation email as soon as possible after the sign up, so it can be activated quickly. The recipient may otherwise forget the reason for the confirmation email or lose interest in the newsletter.

2. What should I be aware of when setting up the activation email?

- **Subject**. Ensure that your activation email has a meaningful subject line that directly prompts the user to take action. For example, "Please confirm your email address".
- **Sender**.The sender name is often the first thing that a person sees and should be recognizable. You should use a consistent sender name for emails, including the activation email. Give your potential subscriber an option to reply to the activation email (avoid using a noreply@...email address).
- **Presentation**. The activation email should avoid using large blocks of text and complicated layouts. Your recipient needs to click the confirmation link. Help them by providing concise and accurate instructions along with a clearly visible confirmation link.
- **Spam suspicion**. Inform new subscribers that emails from new and previously unknown senders may land in their spam/junk mail or unknown mail folders. If the recipient cannot find the confirmation email, they should check these folders.

3. What problems can arise when using the confirmation link in an activation email?

- **Short length**. Make sure that the confirmation link is not too long. Otherwise, there is a danger that it may get broken across two lines and no longer work. In case this happens, you should offer a solution to your subscribers, for example, "If the link does not work, copy both lines into the address bar of your browser." You should further ensure that the confirmation link stands out from the other text in the message, even if the email preview area is small.
- **Correct link**. A further potential source of problems is a confirmation link that does not work. This can happen if the link contains a special character, which causes Outlook or Thunderbird to incorrectly highlight it and thus send the user to a blank page. Another frequent link problem is forgetting to use the HTML anchor tag properly. Check that the confirmation link is correct.

4. How can I avoid any possible problems with the sign up process?

- **Address book entry**. Tell new subscribers to add your email sender address to their personal address book or list of secure senders. You can say something like "To ensure that you receive our newsletter...". This will ideally be supplemented with a link to instructions for common email programs and webmail providers to help with this step. You can also provide a vCard that can be used with some email programs to add your contact data to the address book with a single mouse click.

- **Help / contact options**. Give the user options for providing feedback or contacting you (email address, chat, free phone number, "not working" button) in case of problems with registration or confirmation. This can also be an important feedback channel for identifying problems or areas for improvement in the process. A more elegant solution is to provide contact information for a personal adviser or customer support representative , if this would be appropriate or possible.
- **Resending**. Provide the recipient the option of having the activation email resent in the event that it has not arrived within the first few minutes or the recipient is unable to find it.

> **Tip:** With the help of a special function you can automatically send the last newsletter sent to newly subscribed recipients as soon as they have gone through the opt-in process. For more information, see Scheduled jobs.

Best practices for permission-based email marketing

This document examines the double opt-in process, which lets you get consent from your recipients and provides documentation to prove that consent was given. Optimizely provides the best practices for putting together an opt-in mailing.

What is an initial opt-in?

With the initial opt-in, you can use a standardized procedure to obtain the permission of your recipients and verify the provided email addresses.

The address data that you provided is imported into Optimizely Campaign within the framework of the initial opt-in. An automatic system email is sent to these addresses. The recipients of this email can click the provided link to confirm their agreement to receive your newsletter. Each subscriber who gives permission in this way is added to the recipient list in Optimizely Campaign. Your recipient list will only include subscribers who have explicitly requested the newsletter.

As the sender of the newsletter, you profit from an initial opt-in because you are in possession of your recipients' consent to receive marketing communications in case of complaint.

Best practices for putting together the opt-in mailing

When composing a professional opt-in mailing, take note of the following:

Inbox

Every mailing has certain content elements that your recipients will notice at first glance in their inbox. You should draft your opt-in mailings in a way that your recipients know what they are dealing with:

- Clear sender identification (email address and sender name)
- Clear, free of advertisements and enticingly formulated subject line
  - Example: *Renew your newsletter subscription now.*
  - Example: *Please confirm your subscription to the new [Company] newsletter now.*
- Pre-header with additional subject line and link to online version

Contents

The content elements of your opt-in mailing should entice the recipients to click. They must be absolutely free of advertising:

- The confirmation link must be clearly recognizable even when images are deactivated
- Branding: logo placement at most (ideally without linking)
- Clear formulation of the mailing objective but without the character of an advertisement
- Best practice: It should be understandable from the text that the recipient is being asked to reconfirm the subscription to the newsletter
- Stress the option to unsubscribe at any time in every mailing
- 3-4 confirmation links should be placed (visible and clearly identifiable), for example within the text of the message and as a button
- No advertising content
- No links to social media channels

© Optimizely 2022

- No unnecessary links but rather a clear focus on the confirmation link
- Clear and enticing formulation of the confirmation link: "Yes, I want to continue to receive the newsletter."
- Explanation of what happens if the confirmation link is not clicked
- Reference to the source of the original subscription

Footer

Provide information about the company and data protection:

- Full legal imprint
- Reference to data protection
- Link to the data protection provisions found on your homepage
- Mention the addressee's email address in the footer

Creating subscription and unsubscribe forms

This topic describes how to create forms for users subscribing to and unsubscribing from newsletters. On request, Optimizely creates customized subscription and unsubscribe forms for you. To do so, contact customer support.

Required data

To subscribe to a newsletter, you typically need at least a user's email address. Generally, you want to additional information from a user, to address recipients personally. When requesting information, distinguish between required and optional fields.

To comply with legal provisions, you must also specifically identify any personal information that is required to make use of a service (only applies to email addresses), and any personal information collected with or without the user's knowledge. With respect to your subscription form, this means:

- The only required field is the recipient's email address.
- Other fields are optional (because they are not absolutely necessary to receive a newsletter). The personal information collected in them is provided voluntarily. These may include a user's interests, age and place of residence (or zip code). The user can select

© Optimizely 2022

from a list of interests by clicking check boxes. Age and zip code can be selected from a list. This information does not require the recipient's declaration of consent. If you want to make these required fields, include a reference to the rules on data privacy protection.

- Personal information collected without a recipient's knowledge that occurs through that recipient's actions (click data), for example, by opening a newsletter, requires the recipient's consent.

> **Note:** Each data field in a form must have a corresponding recipient list field to which the data is imported.

Creating the design and text

The design of form pages should be as simple and clear as possible. Ideally, the user should not need to use the scroll bar to reach the bottom of a page. This means that the fields used in a form, data protection notices, and the **Send** button should be arranged so that they display in the most commonly used screen and font sizes without needing to scroll.

If the form is to be integrated into your web page, for example, your shop site, specify your frame size (width in pixels). In this case, make sure that your website's HTML code supports scroll bars; otherwise, the form may not display correctly.

Using an HTML template

A good idea is to send Optimizely the pages as HTML templates. You need a separate template for each page (for example, subscribe page, unsubscribe page).

If you use this option, texts (except error messages) must be included in the template in their final form. In addition, specify the error messages to be displayed if a field is not completed or filled out incorrectly.

If you want to provide the template as a graphic, send the text in a separate text file.

Displaying error messages

Indicate which error messages should appear and where they should be displayed. For example:

Error	Error message	Where to be displayed
No email address entered	*Please enter an email address.*	Next to email input field
Consent not provided	*You must confirm that you want to receive this newsletter.*	Next to check box
Required field not completed	*Please complete all required fields.*	Next to the applicable field

> **Note:** Error messages should appear as text directly above, alongside, or below the applicable field in a form. Alternately, they may appear at the top of a page, with a reference to the applicable field.
>
> It is best if error messages are placed as close as possible to the referenced field, so their meaning is clear. Highlight the relevant field in color. Specify the font size, color and other style elements (background color, frames and so on) to be used in error messages, or provide Optimizely with a graphic template.

Specifying confirmation texts

Specify text to display on the confirmation page (after registration is completed). Specify a sample layout (see above).

Setting up a confirmation email

If subscriptions use a confirmed or double opt-in process, you need to send a confirmation email to the recipients. Optimizely can set up this email in your Optimizely Campaign client so that it is sent automatically when a subscription is submitted. You can manage the content of this email through Optimizely's systems and change the texts at any time.

To set up a confirmation email, specify the following information:

- Type of email (text, HTML or multi-part)
- Name and email address of sender
- Subject
- Personalization (for example, salutation)

Handling user-provided data

Recipient data is forwarded to a recipient list in Optimizely Campaign. Only data for which a corresponding field exists in the recipient list can be recorded.

You should first decide if you want to use an existing recipient list in your client. Which fields are available are determined by the fields in those recipient lists.

To create and manage recipient lists, see Recipient lists. In general, the following apply:

Form field type	Recipient list field type
Free-form text	Text
Pop-up menu	Text (with set values)
Age, zip, and so on	Numerical
Check box	Boolean (possible values are true and false)
Option	Text, numerical or boolean

Sample text and forms

The following are sample texts and forms. You may use the texts either as they appear or in modified form.

Data privacy notice on use of personal information provided voluntarily

Your personal information will only be stored if you provide it to us voluntarily, for example, when registering, completing a survey or as part of a contract. By providing this *information to us, you are indicating your consent to the storage, use and processing of this information. We will not disclose your information to third parties without your consent. You may withdraw your consent to the storage and disclosure of your personal information at any time.*

Data privacy notice on the use of data collected without the user's knowledge and stored in aggregate form

To personalize our newsletters and better address your specific interests, we analyze and store your clicks on links in our newsletters. We guarantee that the analysis and use of this information is carried out only in aggregate form and that under no circumstances will this information be transferred to third parties. By subscribing, you are indicating your consent to the collection of this information. You can cancel your subscription at any time. Your data will be deleted in its entirety upon cancellation.

Data privacy notice on the undisclosed collection of personal information

To personalize our newsletters and better address your specific interests, we analyze and store your clicks on links in our newsletters. We guarantee that the analysis and use of this information is carried out only in aggregate form and that under no circumstances will this information be transferred to third parties. By subscribing, you are indicating your consent to the collection of this information. You can cancel your subscription at any time. Your data will be deleted in its entirety upon cancellation.

Error messages

- *Please enter an email address.*
- *Please enter a correct email address.*
- *Please complete all required fields.*
- *Please indicate that you accept the data privacy provisions and the terms of participation.*

Confirmation page

- **Simple "Thank you" page**: *Thank you for your subscription to our newsletter, which will be sent to example@example.com.*

© Optimizely 2022

- **"Thank you" page (confirmed opt-In)**: *We are delighted to periodically provide you with information about what's new at www.example.com. You will receive an email shortly confirming your subscription. You may of course cancel the newsletter at any time. You will find an unsubscribe link at the bottom of each newsletter.*
- **"Thank you" page (double opt-In)**: *We are delighted to periodically provide you with information about what's new at www.example.com. You will receive an email shortly asking you to confirm your subscription. To confirm your subscription, please click the activation link contained in this email. You may of course cancel the newsletter at any time. You will find an unsubscribe link at the bottom of each newsletter.*
- **Unsubscribe page**: *You have been unsubscribed from our newsletter.*

Unsubscribers

This topic describes how Optimizely Campaign processes mailing unsubscriptions, and how to manage unsubscribers and insert an unsubscribe link into a mailing.

Consequences of a mailing unsubscription

If a recipient unsubscribes from your newsletter by clicking the unsubscribe link or using the unsubscribe form, Optimizely Campaign writes the recipient in a system-internal unsubscribe list.

The recipient's data record is not deleted from your recipient list. The recipient ID, which Optimizely Campaign uses to identify the recipient, is duplicated and copied to the system-internal unsubscribe list.

© Optimizely 2022

Your recipient list

Email	Title	First name	Last name
peter.marston@example.com	Mr.	Peter	Marston
mark.smith@example.com	Mr.	Mark	Smith
bob.williams@example.com	Mr.	Bob	Williams
susan.jones@example.com	Ms.	Susan	Jones
margret.miller@example.com	Ms.	Margret	Miller
lea.harris@example.com	Ms.	Lea	Harris
boris.reed@example.com	Mr.	Boris	Reed
luke.cook@example.com	Mr.	Luke	Cook
donald.morgan@example.com	Mr.	Donald	Morgan
michael.jenkins@example.com	Mr.	Michael	Jenkins
jordan.patterson@example.com	Mr.	Jordan	Patterson
sarah.howard@example.com	Ms.	Sarah	Howard
may.adams@example.com	Ms.	May	Adams
julia.green@example.com	Ms.	Julia	Green

System-internal unsubscribe list

Email	Title	First name	Last name
tom.henderson@example.com	Mr.	Tom	Henderson
justin.allen@example.com	Mr.	Justin	Allen
rangar.bell@example.com	Mr.	Rangar	Bell
susan.jones@example.com	Ms.	Susan	Jones
adam.powell@example.com	Mr.	Adam	Powell
lola.coleman@example.com	Ms.	Lola	Coleman
christine.flores@example.com	Ms.	Christine	Flores
luke.cook@example.com	Mr.	Luke	Cook
meggan.nelson@example.com	Ms.	Meggan	Nelson
cindy.gonzales@example.com	Ms.	Cindy	Gonzales
lee.moore@example.com	Mr.	Lee	Moore
june.perry@example.com	Ms.	June	Perry
melody.hill@example.com	Ms.	Melody	Hill
bert.brown@example.com	Mr.	Bert	Brown

> **Tip:** By default, the system-internal unsubscribe list is linked to all recipient lists of a client. The unsubscribe list is not inherited by other clients in your user account.

If you want to link the system-internal unsubscribe list to only one recipient list in your client, contact customer support to change the configuration.

How it works

For each sending, Optimizely Campaign compares your recipient list with the system-internal unsubscribe list, then excludes recipients on the unsubscribe list. Optimizely Campaign takes this approach so you can continue to analyze periods when the unsubscriber was active. To remove unsubscribers from your recipient list, manually delete them from your recipient list using the Cleanup feature.

If subscribing to the newsletter again, the recipient is deleted from the system-internal unsubscribe list after confirming the double opt-in. The recipient begins to receive mailings again.

> **Tip:** Unsubscribes or new subscriptions are also possible via, REST API, SOAP API and HTTP API.

Querying a system-internal unsubscribe list

In the Optimizely Campaign user interface, you cannot see the system-internal unsubscribe list. But you can use the REST API to retrieve information about all unsubscribes. If you are using the SOAP API, use the contains and containsAll methods to query whether one or more recipients are on an unsubscribe list.

You can also export unsubscribers as CSV files. See Exporting recipients.

Deleting unsubscribers from a recipient list

Use Cleanup to delete unsubscribers from a recipient list.

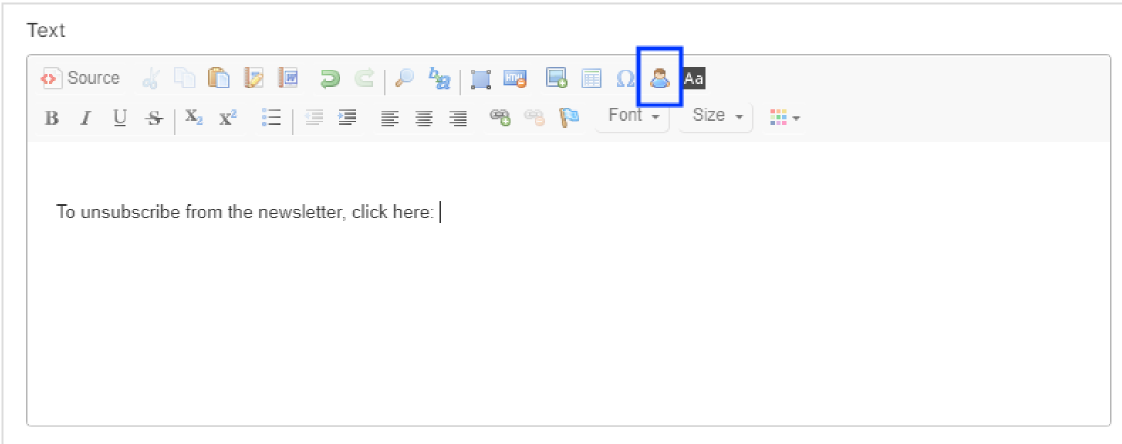
Inserting an unsubscribe link into a mailing

If you use the Optimizely Campaign's unsubscribe logic, Optimizely sets up a field function to insert the unsubscribe link into your mailing. You can integrate the unsubscribe link in your mailing in two ways:

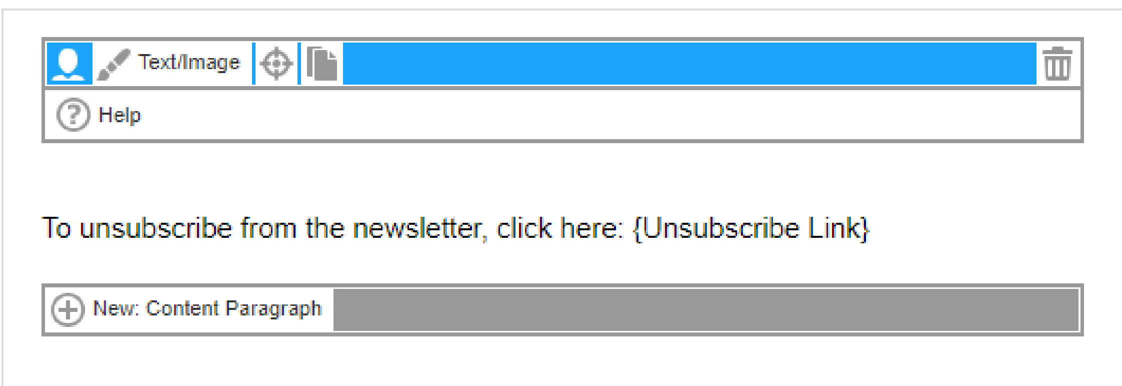
- Display the unsubscribe link URL: For example: *To unsubscribe from the newsletter, click here: example.com/unsubscribe/123456abcdefg.*
- Link the unsubscribe link to a word or phrase, such as *To unsubscribe from the newsletter, click here.*

Displaying the URL of the unsubscribe link

1. Open the editor window of the mailing and click the name of the paragraph that will contain the unsubscribe link (such as text/image paragraph or footer paragraph).
2. In the editor text field, insert the note for unsubscribing the mailing, such as *To unsubscribe from the newsletter, click here:.*
3. To insert the URL of the unsubscribe link directly, click where you want to insert the URL and click **Insert field function** .



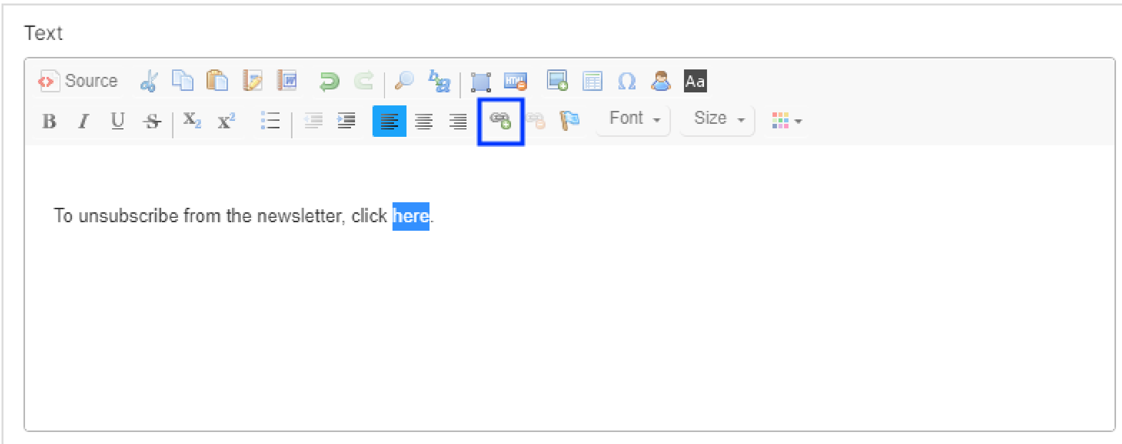
4. From the list, select the field function for the unsubscribe link and click **OK**.
5. Click **Apply**. In the left preview area, the field function is displayed in curly brackets: *{Unsubscribe Link}*. When the mailing is sent. Optimizely Campaign resolves the field function and inserts the URL of the unsubscribe link into the mailing individually for each recipient.



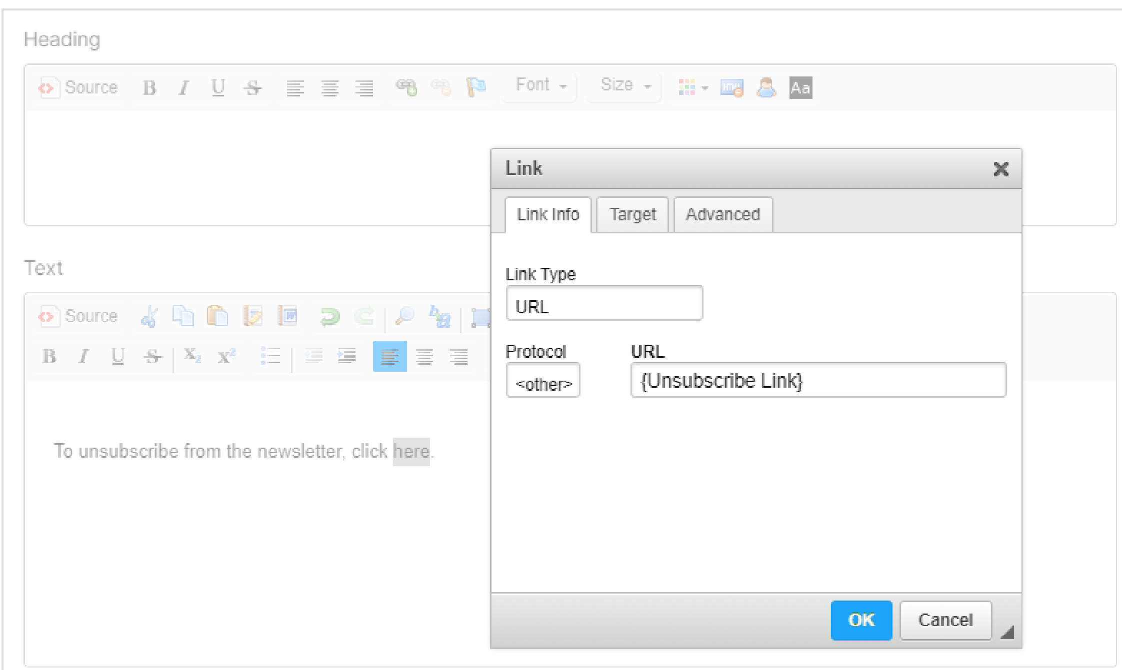
Linking the unsubscribe link to a word or phrase

1. In the mailing's editor window, click the name of the paragraph that will contain the unsubscribe link (for example text/image paragraph or footer paragraph).
2. In the editor on the right side, insert the note for unsubscribing the mailing, such as *To unsubscribe from the newsletter, click here.*
3. Highlight the word or phrase to be linked to the unsubscribe link, such as *here*.

4. Click **Link** .



5. Enter the URL field `{Unsubscribe Link}` in curly brackets. In the **Protocol** drop-down list , the type changes automatically to *<other>*.



6. Click **OK**.
7. Click **Apply**.

Changing the confirmation page URL

> **Note:** For this feature you need administrator rights in Optimizely Campaign.

To change the URL of the confirmation page the unsubscribe link points to, do the following:

1. Open the Optimizely Campaign menu and select **Administration** > **Unsubscribe Link**.
2. In the input field, make your changes to the URL of the confirmation page.

   > **Note:** The URL must begin with the *http://* or *https://* protocol. Make sure that the confirmation page is accessible at any time.

   > **Tip:** If you do not have your own confirmation page, you can use the following default page: *https://www.srv2.de/unsubscribe_en.html*.

3. Click **Save**.

FAQs

- **Can I add a recipient to the unsubscribe list or remove a recipient from the unsubscribe list using Optimizely Campaign?**

  No. The unsubscribe process can only be carried out by the recipient himself. To cancel unsubscription, the recipient has to subscribe to the newsletter again (depending on the configuration with opt-in).

- **Can I unregister a recipient by deleting the recipient from the recipient list?**

  If deleted from a recipient list, the recipient receives no more mailings via this list. If existing on more than one list, the recipient continues to receive mailings via other recipient lists from which he or she has not been removed.

> **Warning:** This procedure is not recommended, as the deletion is not recorded and the recipient can be accidentally added to a recipient list again, for example when importing recipients. The legal consequence can be a warning if the recipient receives mailings despite unsubscribing.

- **I maintain my recipient list by myself and import it to Optimizely Campaign before each sending. What do I have to consider?**

  Make sure that you import only active recipients into the recipient list. Import unsubscribers into the unsubscribe list so that the cross check can take place before dispatch.

  You can import unsubscribe lists or multiple lists via specially set up jobs/services. These scheduled jobs cannot be accessed via the Optimizely Campaign user interface. The corresponding lists are transferred to the Optimizely Campaign server via SFTP and automatically imported into the client:

  - **Import unsubscribe list**. Import your local unsubscribe list into the unsubscribe list of your Optimizely Campaign client.
  - **Import recipients including unsubscribers**. Import a single recipient list that contains active recipients from different lists and unsubscribers. Enter the status of the recipient or the list into which you want to import in a separate column of the recipient list. In this way, you always have consistent lists.

  For more information, see Scheduled jobs.

- **What are list unsubscribe headers?**

  By using list unsubscribe headers in a newsletter, recipients can unsubscribe from a mailing via the user interface of their email program (such as Gmail or Outlook). Searching for the unsubscribe link in a mailing is not necessary this way.

Recipient history

> **Note:** To enable this feature, contact customer support.

Use the recipient history to view the message history (Mailings Classic and Smart Campaigns), the Marketing Automation history and the campaign analysis (Smart Campaigns), view the opening and click behavior of your recipients and the third-party ID. This lets you see which email, which SMS, which push message you have sent and to whom it was sent. In the Right to be forgotten tab you can also irrevocably delete recipient data.

For example, if a recipient contacts you to say that a newsletter was not received, you can investigate the reason why. In the recipient history, enter the recipient's data to see an overview of their communications. Using this information, you can check to see whether the recipient has perhaps inadvertently unsubscribed. You might see that the newsletter is sent and you should ask the recipient to check in their spam folder for the newsletter. You can even check to see if the recipient is currently in a **Wait** node and will receive the expected newsletter later on in the day.

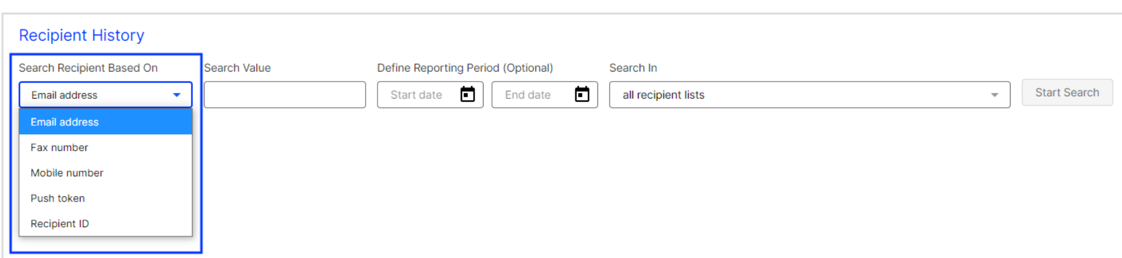
You also can see how each recipient reacted to your communication with them: which messages they opened, and which links they clicked.

> **Note:** Recipient history is not available for print messages.

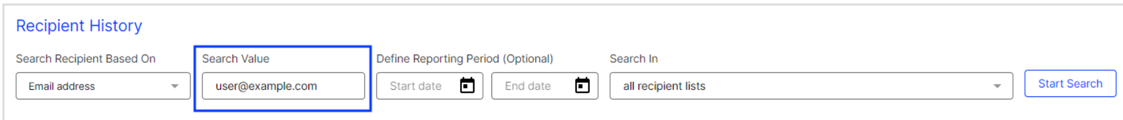
To open the recipient history, open the Optimizely Campaign menu and select **Recipients** > **Recipient History**.

Showing message history

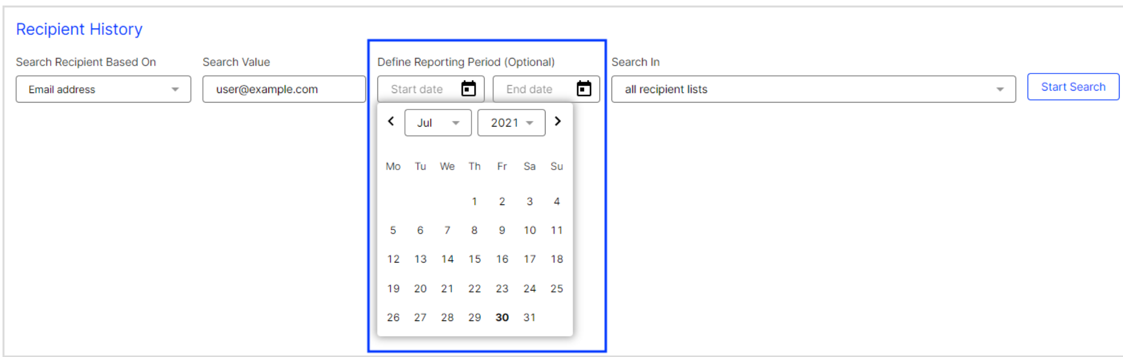
1. In the **Search Recipient Based On** drop-down list, select the type of information to use to find the message history for the recipient. You can use the recipient ID, email address, mobile phone number, fax number or a push token.



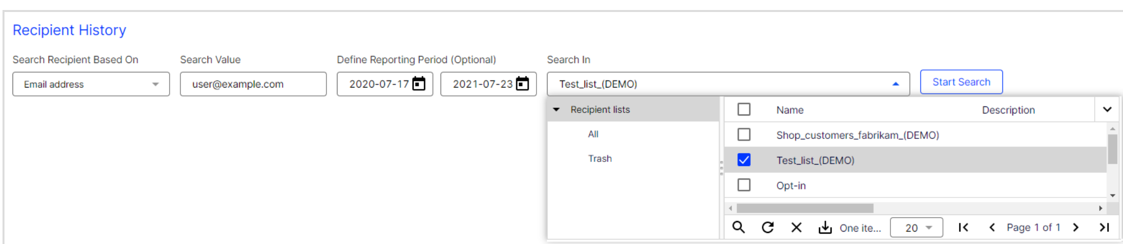
2. In the **Search Value** field, enter the recipient ID, email address, mobile phone number or push token to search for.



3. You can limit the time period for which the message history is displayed by entering start and end dates under **Define Reporting Period (Optional)**. If you do not enter a start and end date, the entire message history for the recipient is shown.



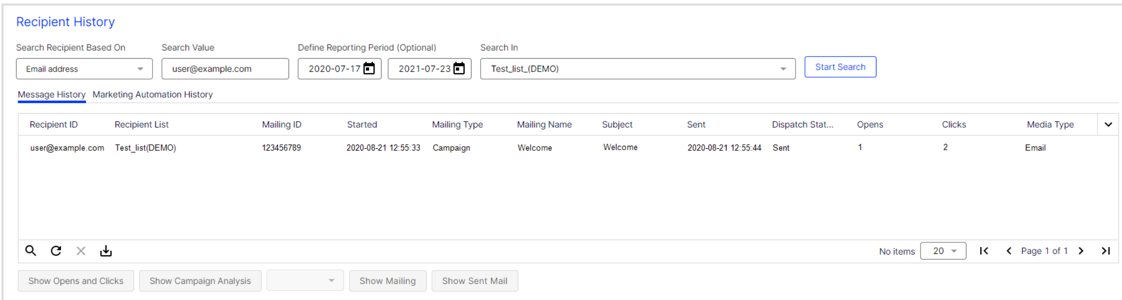
4. By default, recipient lists within the entered data sets for your client is searched. If you want to limit the search to specific recipient lists, use the **Search In** drop-down list and select the check box next to each recipient list you want to search.



5. When you have completed the fields, click **Start Search**.

> **Tip:** The search may take several minutes depending on the number of recipient lists being searched. The message "Loading, please wait..." is displayed at the bottom right in the status bar to indicate that a search is being executed.

When the search has completed, the message history for the recipient is shown. The list starts with the most recent message.



The message history provides the following information:

- recipient ID
- recipient lists in which the recipient can be found
- mailing IDs of messages sent to this recipient
- marketing channels of the messages sent (email, SMS, Mobile Push)
- start times of the messages
- mailing types (regular, special, temporary (test messages) or campaign)
- mailing name
- subject
- send date
- number of openings
- number of clicks in the messages

> **Note:** To display the number of openings and clicks, the users of your client must have permission to view action data. If your users need this permission, contact an administrator or customer support.

- send status

6. To view the content of a message, click **Show Mailing**. Depending on the media type selected, you can select a display option from the drop-down list to the left of the button. For example, if the media type is **Email**, you can choose to display the message as either HTML or plain text.

> **Note:** The current message content is displayed. Older versions cannot be reconstructed. Therefore, the displayed message may differ from the message that a recipient previously received if the message is subsequently modified.

Showing consent history

A *consent* is an email of the mailing type **Confirmation email** in which a recipient provides consent by clicking a confirmation link. The consent has a version and time stamp, so you can see when it was registered.

To access archived consent information:

1. Identify recipients for whom you want to view confirmation emails. For example, use the **Email address** criterion to search for a recipient.
2. Under **Message History**, search for a message of the mailing type **Confirmation email**.
3. Click **Show Sent Mail**. The consent email appears.
4. Use the **HTML** and **Text** tabs to see the selected email in its HTML and text version as it was sent at the time stated. Click **Header** to get detailed information about the header data of the email. The tab **Opt-in Details** provides information about when the opt-in request was sent and when it was confirmed.
5. Optionally download the consent email.

Showing opening and click behavior

The recipient history can show you the messages that the recipient opened and the links that the recipient clicked in the message.

> **Note:** To display the number of openings and clicks, the users of your client must have permission to view action data. If your users need this permission, contact an administrator or customer support.

© Optimizely 2022

To display the opening and click behavior of recipients for individual messages, perform the following steps:

1. In the **Message History** tab, select the message for which you want to see the opening and click behavior.

   > **Tip:** The number of opens and clicks is shown in the message history list in the **Opens** and **Clicks** columns.

   If opening and click data is available for the selected message, then **Show Opens and Clicks** is enabled.

2. Click **Show Opens and Clicks**. A new list expands showing the action data type (open or click), the time, the mailing name, the mailing ID, which links were clicked, and the media type., then you can choose to display the message as HTML or plain text.
3. To see the message associated with the opening and click behavior, click **Show Mailing**. Depending on the media type selected, you can select a display option from the drop-down list to the left of the button. For example, if the media type is **Email**, then you can choose to display the message as HTML or plain text.

Showing campaign analysis

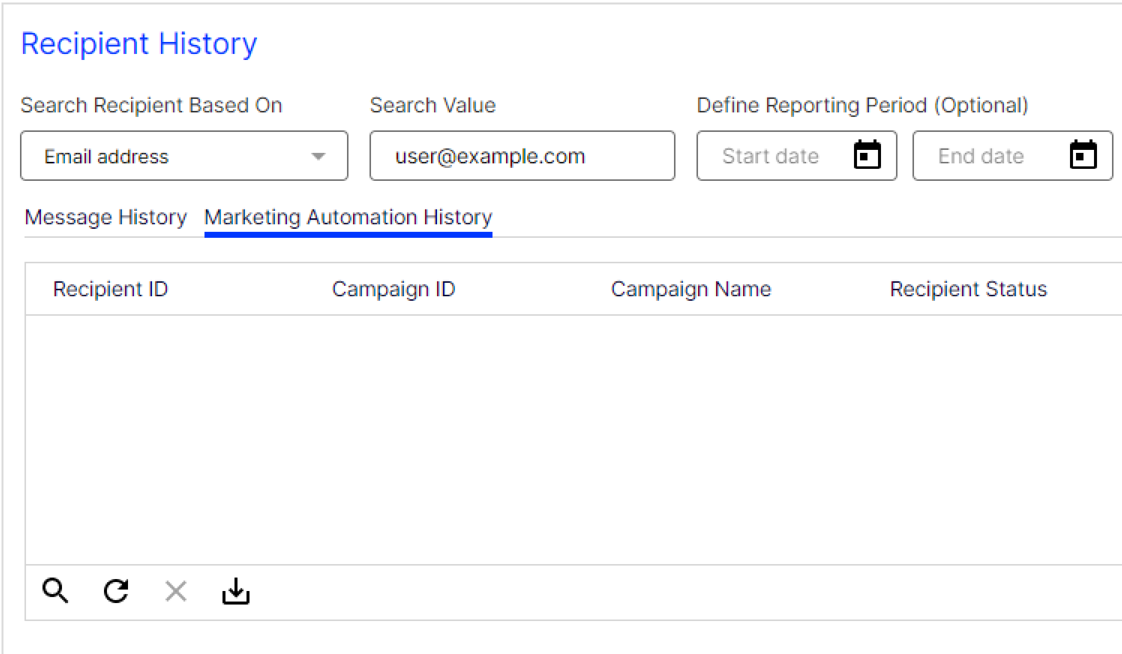
If a message in message history is part of a campaign or Smart Campaign, you can display the associated campaign analysis.

1. In the **Message History** tab, click the message for which you want to view the campaign analysis.
2. Click **Show Campaign Analysis**. A new window opens with the campaign analysis. See also **Analysis**.

Showing Marketing Automation history

1. Next to the **Message History** tab, click the **Marketing Automation History** tab. The Marketing Automation history is displayed in a list that shows the recipient ID, campaign ID, start date, campaign name, recipient status, and a preview of the history.

© Optimizely 2022



2. To get an ordered overview of the recipient's entire history, select the corresponding Marketing Automation campaign from the list by clicking the entry. The action list for the Marketing Automation campaign opens, showing recipient actions within the Marketing Automation campaign and the associated date.

Display	Event	Example
Started in "..." node #...	The recipient has started in the specified node. The corresponding node ID is shown after the # symbol.	*Started in "New recipient" node #123456789*
Started in campaign "..." (#...)	The recipient is delegated within a campaign to another campaign. The corresponding campaign ID is shown after the # symbol.	*Started in campaign "More offers for you" (#123456789)*
Forwarded to "..." node #...	The recipient is forwarded to the specified node. The corresponding node ID is shown after the # symbol.	*Forwarded to "Wait" node #123456789*
Wait until...	The recipient is waiting or has waited in a **Wait**	*Wait until 2016-09-*

Display	Event	Example
	node until the specified time.	*01 11:15:31*
... message "..." (#...) sent to recipient	The message is sent to the recipient. The message media type (Email, SMS or Mobile Push), the name of the message and the message ID (after the #) is shown. To view the message content, select the corresponding entry and click **Show mailing**. Depending on the media type selected, you can select a display option from the drop-down list to the left of the button. For example, if the media type is **Email**, you can display the message as HTML or plain text.	*Email message "Welcome" (#123456789) send to recipient*
Message ... sent to recipient (details no longer available)	The message is sent to the recipient. The sending time is displayed. Further details cannot be displayed, as these are no longer available. This message usually relates to test messages that were sent and whose content is not permanently stored by Optimizely Campaign.	*Message 2016-09-01 11:15:31 sent to recipient (details no longer available)*
completed in node #...	The recipient passed through the campaign and is completed. The corresponding node ID is shown after the # symbol.	*completed in node #123456789*
Not completed in node #...; Error: "..."	The recipient did not pass through the campaign. The corresponding node ID is shown after the # symbol. The error is displayed as a numerical code: -1 Default error (a possible reason could be a mailing dispatch error) 1 The recipient is on the blocklist.	*Not completed in node #123456789; Error: "1"*

Display	Event	Example
	2 The recipient is on an unsubscribe list. 3 The recipient has exceeded the bounce limit. 4 The recipient was not found. 5 The recipient is already existing. 6 Invalid mailing status	
Recipient edited: ...	The recipient is edited in Marketing Automation in the **Change recipient** node. The corresponding change is shown.	*Recipient edited: The value of the "Customer status" field changed to "Premium customer"*
Recipient not modified - Recipient is not in the recipient list "..." (#...) defined in the "Change recipient" node	The recipient has not been edited in the **Change recipient** node because the recipient is not in the specified recipient list. The recipient list ID is shown after the # symbol.	*Recipient not modified - Recipient is not in the recipient list "Existing customers" (#123456789) defined in the "Change recipient" node*
Copied to recipient list "..." (#...)	The recipient has already been copied to the specified recipient list. The recipient list ID is shown after the # symbol.	*Copied to recipient list "Premium customers" (#123456789)*
Recipient not copied – the recipient is already contained in recipient list "..." (#...)	The recipient is not copied to the recipient list because they are already in the specified recipient list. The recipient list ID is shown after the # symbol.	*Recipient not copied – the recipient is already contained in recipient list "Existing customers" (#123456789)*

Display	Event	Example
Recipient not copied – the copy option was not selec-ted	The recipient is started in a parallel Marketing Automation campaign via the **Start in** node. The additional option **First copy to** is not selected.	*Recipient not copied – the copy option was not selected*
Updated in recipient list "..." (#...)	The recipient is copied to a recipient list that has an existing entry for that recipient. The recipient dataset is updated in the target recipient list. The ID of the target recipient list is shown after the #.	*Updated in recip-ient list "Existing customers" (#123456789)*
Updated in recipient list "..." (#...(and deleted in "..." (#...)	The recipient is copied to a recipient list that has an existing entry for that recipient. The recipient dataset is updated in the target recipient list. The recipient dataset is deleted from the source recipient list. The names and ID (after the #) for the corresponding recipient lists are shown.	*Updated in recip-ient list "Active cus-tomers" (#123456789) and deleted in "Inactive customers" (#1122334455)*
Matched target group "..." (#...)	The recipient is assigned to a target group. The ID of the target group is shown after the #.	*Matched target group "Women" (#123456789)*

Code	Description
-1	**DEFAULT_ERROR_CODE**. Default error code.
1	**BLACKLISTED_ERROR_CODE**. Blocked recipient.
2	**UNSUBSCRIBED_ERROR_CODE**. Unsubscribed recipient.
3	**OUTBOUNCED_ERROR_CODE**. Outbounced recipient (exceeded the bounce limit).

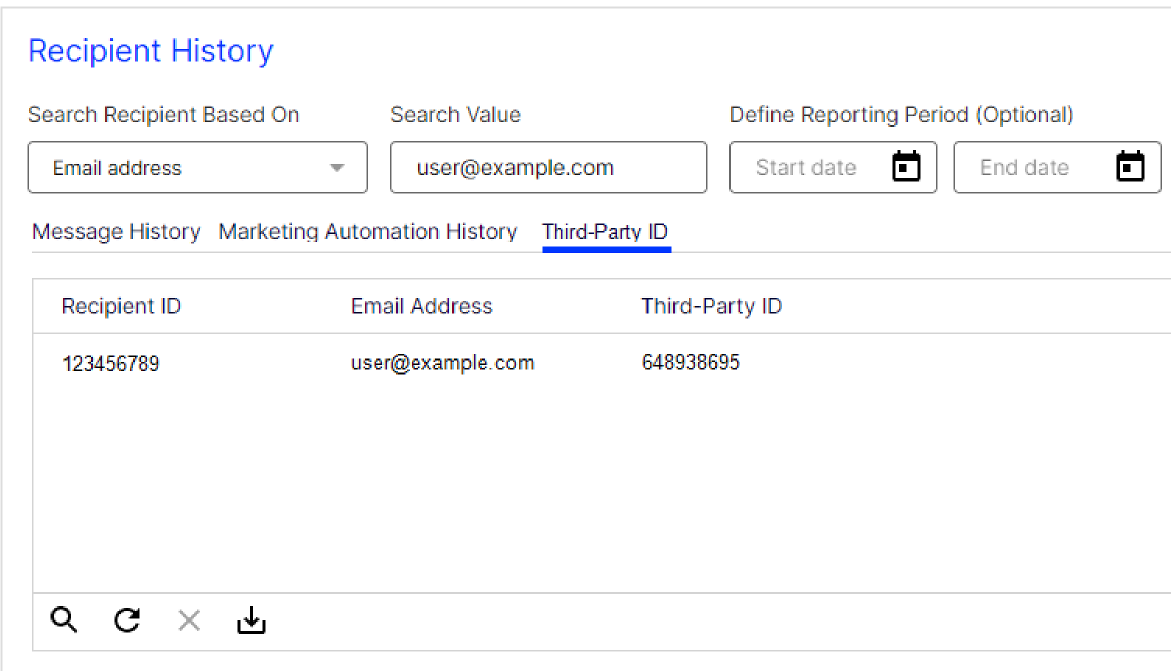
© Optimizely 2022

Code	Description
4	**RECIPIENT_NOT_FOUND_ERROR_CODE**. Recipient could not be found.
5	**RECIPIENT_ALREADY_EXISTING_ERROR_CODE**. Already existing recipient.
6	**INVALID_MAILING_STATUS_ERROR_CODE**. Invalid mailing.

Showing the third-party ID

In the **Third-Party ID** tab, you can find the pseudonymized ID of the selected recipient.

To view the third-party ID, click **Third-Party ID** next to **Marketing Automation History**.



The **Third-Party ID** tab provides the following information:

- **Recipient ID**. ID of the recipient selected in **Search Recipient Based On**.
- **Email Address**. Email address of the recipient.
- **Third-Party ID**. Pseudonymized ID of the recipient.

Right to be forgotten

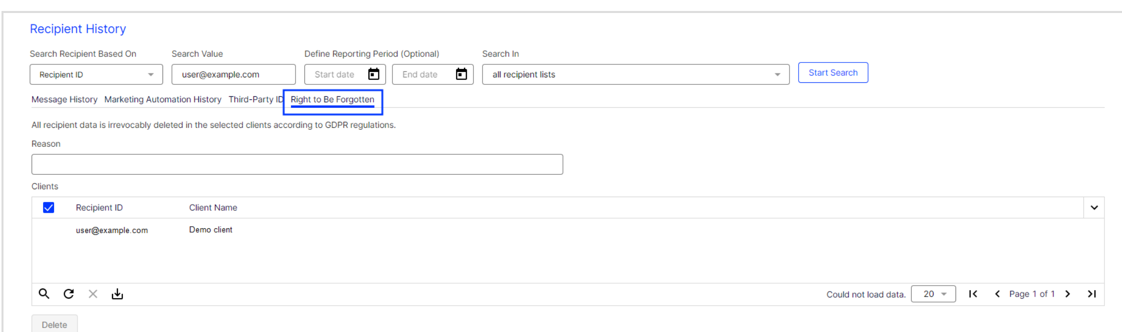
According to Article 17 of the General Data Protection Regulation (GDPR), the *right to be forgotten*, every person has the right to have personal data deleted.

In the **Right to Be Forgotten** tab, you can irrevocably delete all recipient data except blocklist entries. To delete blocklist entries, see blocklist overview. You can also delete blocklist entries via REST API.

> **Note:** The users of your client need the permission to wipe the recipient history. To grant this permission, contact an administrator or customer support.

To delete recipient data, do the following:

1. In the **Search Recipient Based On** drop-down list, select **Recipient ID**.
2. In the **Search Value** field, enter the recipient ID or part of the ID of the recipient whose data you want to delete.
3. Click **Start Search**.
4. Click the **Right to Be Forgotten** tab.



5. Under **Reason**, optionally enter a reason for the deletion.
6. Under **Clients**, select the clients in which you want to delete the recipient data.

7. Click **Delete**.

> **Warning:** You cannot restore deleted data.

8. Confirm by clicking **OK**.

> **Tip:** Depending on how many clients you have selected and how much recipient data is deleted, the process can take several minutes.

Exporting mailing and performance data

> **Note:** To enable this feature, contact customer support.

This feature lets you export mailing and performance data to further process it in an external system. The data is exported to a CSV or XML file.

The export runs at a defined interval, such as daily at midnight or once a week. You can download exported data via SFTP from a secure server.

Click profiles

Using click profiles, you can create target groups. The clicks users make are the basis of click profiling. For example, email recipients who frequently click Blu-ray offers can be segmented via a click profile then supplied with targeted and highly relevant information.

Click profiling lets you create profiles – manually or automatically and independent of individual mailings or links – that are associated with the tracked links in your mailings. When created, tracking links are tagged.

> **Tip:** Click profiling complements tracking link management – and its functions remain preserved. You can still edit links in a mailing individually via the **Tracking** tab in the **Edit Mailing** wizard. Determine

whether the link in the HTML and text version should be tracked and enter a description of the link.

To manage click profiles, open the Optimizely Campaign menu and select **Recipients** > **Click Profiles**.

Creating and editing click profiles

To create a click profile, do the following:

1. In the **Click Profiles** window, click **Create…**.
2. Enter a name and an optional description.

3. Optional: In the **Folder** drop-down list, select a folder in which to save the new click profile.
4. Click **Finish**.

To edit a click profile, select it from the list and click **Edit…**.

To assign links to the newly created profile, see Assigning click profiles.

To create a rule-based profile and automatically assign links, see Assigning rule-based click profiles automatically.

Assigning click profiles

To assign links manually to one or more click profiles, do the following:

1. In the **Click Profiles** window, select the desired click profiles and click **Assign…**.
2. In the **Mailings** drop-down list, select one ore more mailings to display links from these mailings in the **Tracking Links** list.

3. In the **Tracking links** list, select one or more links that you want to assign to a profile. The **Click Profiles** drop-down list below this list shows profiles. If you already selected a profile in the overview window, it is displayed.
4. You can change, add or remove profiles.
5. To save the assigned links, click **Add**.

Removing assigned click profiles

> **Note:** Automatically assigned profiles cannot be removed.

1. In the **Click Profiles** window, click **Assign...** and select one or more mailings.
2. Select a link.
3. Click **Remove** to unassign the profiles from that link.

> **Tip:** If you unassign a profile, it is only removed from the link. The profile itself cannot be deleted.

Assigning click profiles when editing a mailing

1. From the list in the **Tracking** tab, select a link and click in the **Profiles** field.
2. Select one or more profiles from the selection window and click **OK**.

If you use a message template that is configured accordingly, you see a **Click Profiles** tab in the editor window of a paragraph. To assign a profile to links of a paragraph, select the check box next to the desired profile.

> **Tip: Manually assign rule-based profiles**
>
> You also can assign rule-based profiles manually to a link that does not match the rule using the function described in the previous paragraph. These links may be considered the exceptions to the rule. Reciprocally, rule-based profiles cannot be removed from a link that does match the rule.

Rule-based assignment

Rule-based click profiles automatically assign tracking links. To enable this, the link URL is analyzed according to the character strings it contains or on the basis of regular expressions. The rules for automatic assignment are configured during the creation or editing of a click profile. Two fields are allocated for this purpose.

- **Rule**. Contains details of the character string the URL of a link must contain, or what rules the construction of a URL must follow, so that a profile can be assigned. You can use wildcards (?, *) to track link URLs with specific recurring character sequences to be categorized. You can also use regular expressions.
- **Rule Type**. The rule and rule type must match together for rule-based assignments to function.

Test rule-based click profiles to ensure the desired result is achieved. Rule-based click profiles can be adjusted at any time, and assignments are automatically updated.

> **Tip:** Rule-based assignments cannot be removed. If you change a rule, assignments are updated. This means that links that are no longer applicable will are not shown in the corresponding profile.

Wildcard example

The following link is to be analyzed with a wildcard click profile:

```
www.example.com/new_article/xy/ref=1234
```

If tracking links to the newest articles in your web shop contain `.../new_article/...` in the URL, you would formulate the following wildcard rule to automatically tag the link:

```
*/new_article/*
```

Regular expression example

Regular expressions let you formulate sets and subsets of character strings with the help of syntactic rules. For example, you can define that a URL contains or does not contain specific characters. Regular expressions also allow the filtering of number ranges. They treat URLs as a character sequence (string) and analyze them according to the formal criteria of the regular expression.

The following link is to be analyzed with a regular expression. In contrast to the URL in the previous example, this link does not contain a section that can be analyzed using a rule. But you can solve the problem using a number range filter:

```
www.example.com/xy/ref=1234
```

In this case, the regular expression examines letter code and the article reference:

```
.*[x-z][x-z]/ref=12[0-9][0-9]
```

- A dot and an asterisk (`.*`) stand for any characters.
- Square brackets (`[ ]`) denote a range. In this case, the letters x, y, or z can be in the first or second position.
  - The expression filters xx, xy, xz, yx, yy, yz, zx, zy and zz.
  - This expression filters numbers from 1200 to 1299. The first two numerals must be 1 or 2. The numerals in third or fourth place can range from 0-9. Four numerals must exist.

Responses

Responses are messages sent back to the sending server (in this case, the Optimizely Campaign server) for various reasons.

Responses are classified by filters (autoresponders, hard bounces, soft bounces, replies, keyword SMS). Optimizely Campaign automatically manages bounces and adds recipients that have generated a defined number of bounces to a corresponding list.

> **Tip:** You can also export hard and soft bounces automatically on a regular basis, for example to synchronize them with an external distribution list. For more information, see Scheduled jobs.

Displaying responses

To display responses, do the following:

1. Open the Optimizely Campaign menu and select **Responses**.
2. Select one of the following response types from the **Response Type** drop-down list:
   - **All**. Responses from all categories.
   - **Hard bounce**. Unreachable email addresses. This occur if recipients change providers/web mailers. You should not manually erase these recipients because Optimizely Campaign stops sending them emails after the third hard bounce. This threshold can be altered for your account/client.
   - **Soft bounce**. Temporarily unavailable email accounts. This can occur if a recipient mailbox reaches its capacity, and can only accept new email after some is deleted. You should not manually edit soft bounces because the addresses may be reachable again.
   - **Autoresponder**. Automatic reply email, such as *On holiday until May 26*.
   - **Keyword SMS**. Incoming SMS that can be assigned to a running SMS process. See SMS processes.
   - **Reply**. Replies from mailing recipients. The standard Optimizely Campaign setting is that such replies are not sent to you but to the system. If you want to receive these replies in your email account, contact customer support.

     > **Tip: Filters for the response type**
     >
     > Optimizely Campaign filters are set to specify a response with maximum likelihood as a hard bounce, soft bounce, autoresponder, or keyword SMS. If an email cannot be assigned to one of these categories, it is moved to the **Reply** category so that no real reply is lost. You may also find autoresponders and undelivered email in this category.

   - **Spam**. Spammers do not send from their own mail servers but from computers of unsuspecting users. Worms or Trojans (malware) infiltrate user's computers, where they can be misused to send spam. If your mailing is sent to a recipient whose computer is infiltrated, it automatically sends spam to the mailing return address. The Optimizely Campaign server's spam filter places the spam in the spam category.

3. Select one or more mailings from the **Mailings** drop-down list.
4. Click **Show**. The **Overview** area displays all matching responses.

Overview

The list in the **Overview** area displays all responses that match your search profile. You can find the following information:

- **Subject**. Subject line of the returned message with information about the reason for return.
- **Received**. The sending date of the email. Bounces and autoresponders are usually sent the same day the mailing is sent. Responses can be sent several days afterwards.
- **Type**. The response type.
- **Recipient**. The sender of the email.

Recipient details

The **Recipient Details** tab displays response details including email address, recipient registration date, and other data. You can also blocklist or delete recipients.

- **Block Recipient**. See Blocklist overview.
  1. Select a recipient from the list and click **Block Recipient**. The **Block Recipient** dialog box appears.
  2. Optionally, enter a blocklisting reason, such as, *complaint by telephone*.
  3. Click **Apply**. The recipient is added to the blocklist.
- **Delete Recipient**.

  > **Note:** Only use **Delete Recipient** to remove a recipient whose email address does not exist. Recipients who should not receive email from you because of a complaint should be added to the blocklist.

  1. From the list, select a recipient and click **Delete Recipient**.
  2. Confirm.

Reply

The **Reply** tab displays the text of the recipient's reply email.

Blocklists

When a recipient is placed on a blocklist, the recipient will receive no more email from you via Optimizely Campaign, even if the recipient registers to receive mailings again. This ensures that your recipient lists have no dissatisfied recipients. And, a clean recipient list with just a few complaints has a positive impact on the deliverability of your mailings.

To display the blocklist, open the Optimizely Campaign menu and select **Blocklist** > **Overview**. You can perform the following actions for the blocklist.

Adding recipients to a blocklist

1. Click **Add...**. A blank line is added to the list.
2. In the **Pattern** field, for example, enter the email address or phone number of the recipient you want to block.
3. In the **Reason** field, optionally enter a reason for blocklisting (for example, complaint).
4. Click **Submit**.

Adding recipients to a blocklist automatically

If a recipient marks an unwanted email as spam, Optimizely Campaign is notified by the email service provider, and the recipient is added to the blocklist.

Typical reason of a automatic blocklist entry:

```
type=automatic;rule=FBL: AOL;mailing=12345678;m2u=987654321
```

> **Tip:** The **m2u** parameter refers to the mailing-to-user ID, also known as mail ID. The mail ID associates a recipient with a mailing.

Editing a blocklist entries

> **Note:** You cannot edit automatic blocklist entries.

1. To change the reason for blocking, click the entry you want to edit.
2. Click **Edit…**.
3. Edit the content of the **Reason** box.
4. Click **Submit**.

Deleting blocklist entries

> **Note:** You cannot delete automatic blocklist entries.

1. Click the entry you want to remove from the blocklist.
2. Click **Delete**.
3. Confirm the deletion. The recipient is deleted from the blocklist and can receive your mailings again.

Using wildcards

Instead of entering a complete email address, you can use wildcards in the blocklist entries.

- Use the asterisk (*) as placeholder for one or more characters. For example, to block email addresses from a specific domain such as *example.com*, specify `*@example.com`.

  > **Note:** Searching the blocklist may result in multiple entries. For example, *axel@example.com* and **@example.com* may both be on the blocklist. If *axel@example.com* is removed from the blocklist, Axel would still not receive mails because the *example.com* domain is blocked.

- Use the question mark (?) as placeholder for a single character. For example, you are not sure about how a name is spelled correctly, such as `Mar?` for *Mark*, *Marc*, or *Mary*.

- You can use placeholders in the domain part of an email address. For example, `abuse@*` blocks email addresses starting with *abuse*. This account name is usually configured by companies and providers as a default email account for customer complaints. If somebody registers for your newsletter with such an email address, it can be both annoying and cause serial problems and damage your internet reputation.

Blocklist import

When you initially import recipients into Optimizely Campaign, or if you frequently import recipients from a local list, you should also import a blocklist. This function lets you import a CSV file with blocked recipients or wildcard blocklist entries into your client. A blocklist entry can be a complete email address or contain placeholders. See also: Wildcards.

To import a blocklist, perform the following steps:

Prerequisite: A CSV file that contains blocklist entries.

1. Open the Optimizely Campaign menu and select **Blocklist** > **Import**.
2. Click **Browse...** and select a CSV file from your computer that contains the blocklist entries.
3. Click **Import Options**. The **Preview** area shows entries encountered in the CSV file. The **Rule** column must contain the respective email addresses or wildcards to be bocked. Only this first column is imported.
4. If the columns are not displayed correctly, select an encoding type from the **File Charset** list by changing the separator and escape characters.
5. If the first line of the CSV file contains a table head with column designations, select **Yes** in the **Skip First Row** drop-down list.
6. Click **Refresh Preview** to check your settings.
7. Click **Reason**. Optionally, you can enter a reason for blocklisting the imported entries. The reason you enter here applies to all imported entries.
8. Click **Finished**.

> **Tip:** You can also import and export blocklist entries automatically on a regular basis, for example to synchronize them with an external distribution list. For more information, see Scheduled jobs.

Blocklist cleanup

> **Note:** This feature deletes blocklist entries by reason. If you want to delete a single email address or a blocklist rule (wildcard), use the delete entry function.

To clean up the blocklist, do the following:

1. Open the Optimizely Campaign menu and select **Blocklist** > **Cleanup**.
2. In the **Reason** field, enter the reason why you want to delete entries, such as *complaint*. Use the asterisk * placeholder for multiple characters, and a question mark **?** for a single character.
3. Click **Count** to see how many entries with this reason exist.
4. Click **Confirm Deletion**.
5. Click **Delete Blocklist Entries**.

Custom blocklists

> **Note:** To enable this feature, contact customer support.

This optional feature lets you exclude mailing recipients who are not part of the global blocklist.

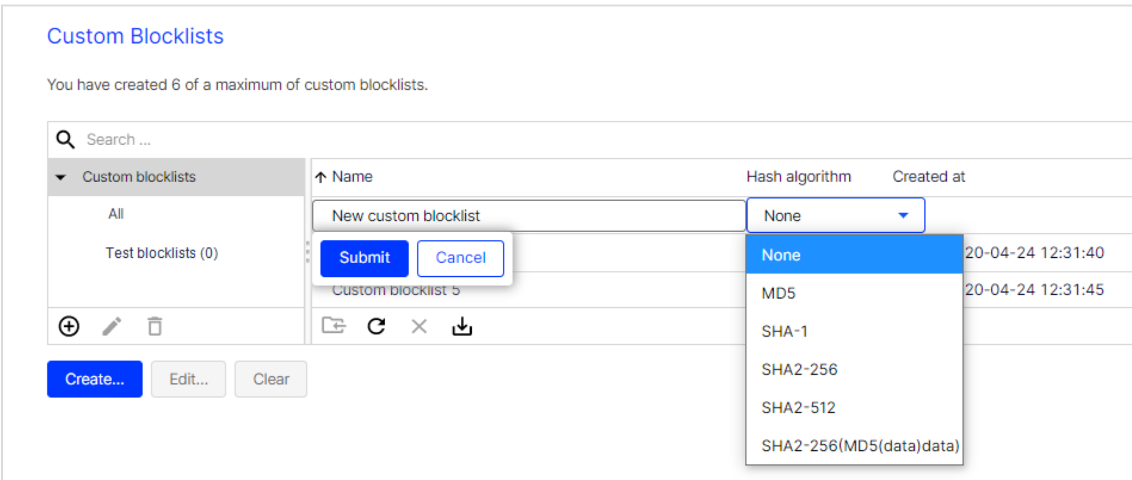
You can create multiple custom blocklists and fill them manually or via CSV data import. Then, use a Block node to add custom blocklists to a campaign in Smart Campaigns or to a transactional mail. As a result, you specify which recipients besides the global blocklist should not receive a mailing.

Creating custom blocklists

1. Open the Optimizely Campaign menu and select **Blocklist** > **Custom Blocklists**.
2. Click **Create...**.
3. Enter a name for the custom blocklist.

4. Select one of the hash algorithms supported by Optimizely Campaign. If the entries in your blocklist do not use hash algorithms, select **None**.

> **Tip:** As long as your custom blocklist is empty, you may change the hash algorithm anytime.

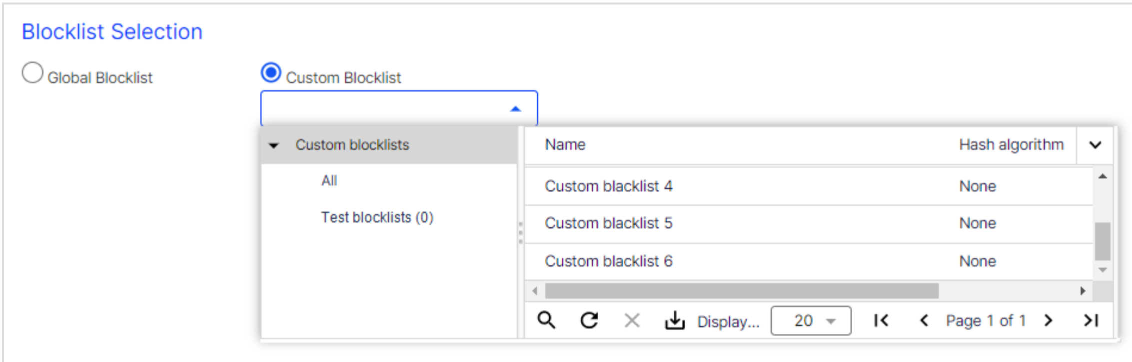


5. Click **Submit**.

> **Tip:** You can delete all entries in a custom blocklist by clicking **Clear**.

Adding and editing recipients manually

1. Open the Optimizely Campaign menu and select **Blocklist** > **Overview**.
2. Under **Blocklist Selection**, click **Custom Blocklist** and select the blocklist you want to edit.

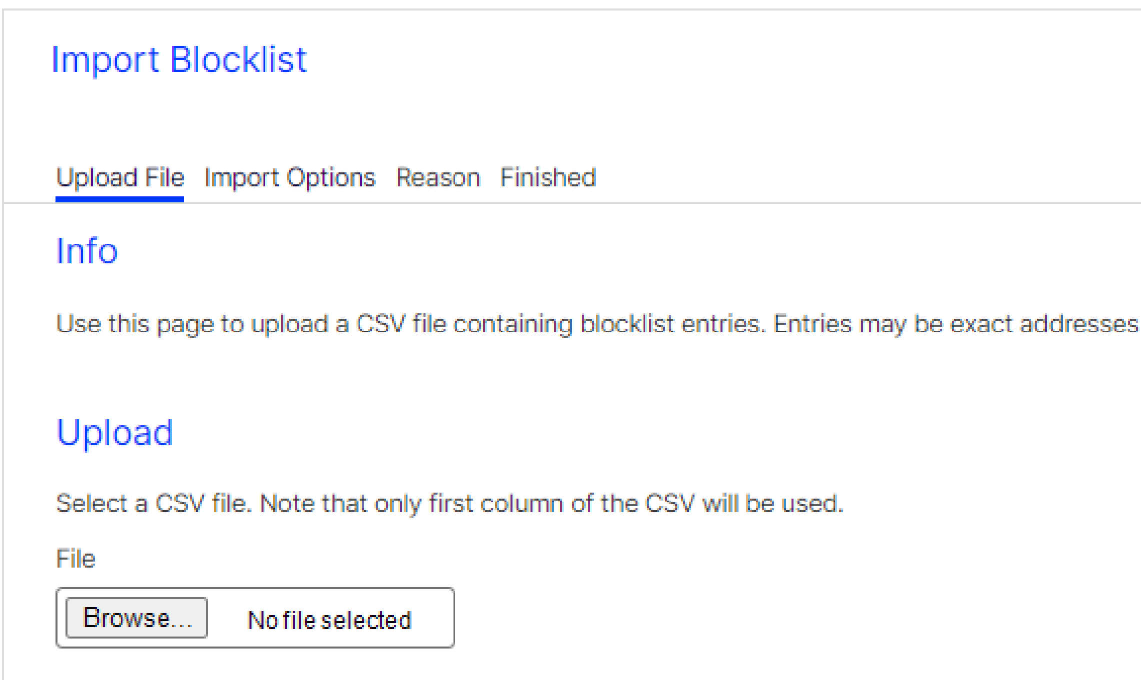


3. Edit the custom blocklist by clicking the **Add...**, **Edit...** and **Delete** button. For more information, see Blocklist overview.

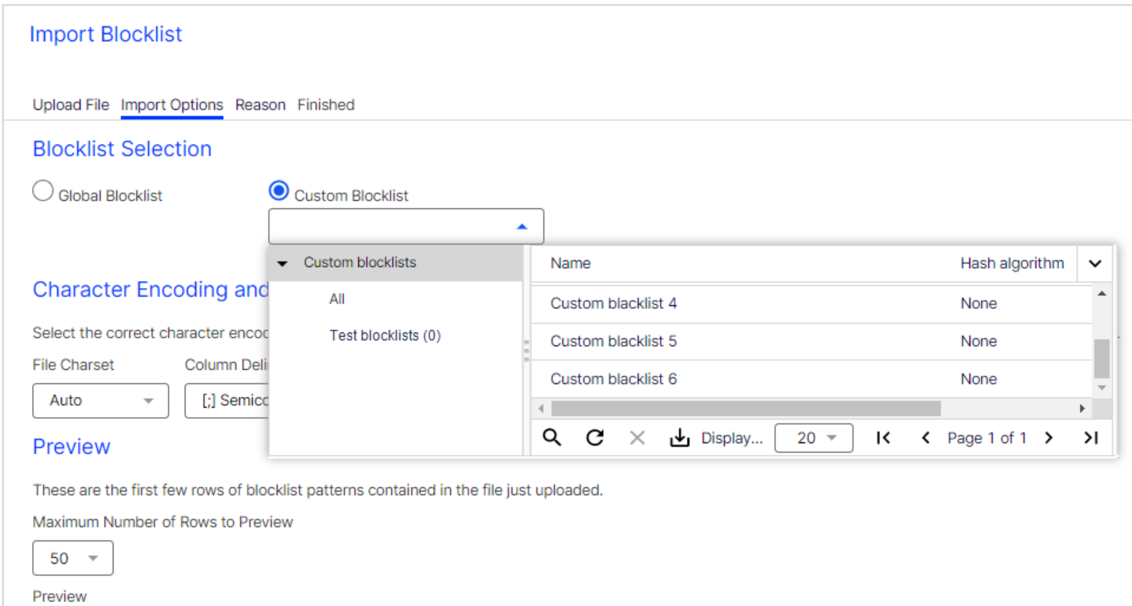
Importing blocklists

To import entries from a CSV file into a custom blocklist, perform the following steps.

1. Open the Optimizely Campaign menu and select **Blocklist** > **Import**.
2. Under **Upload**, click the **Browse...** button and select a CSV file on your local hard disk.



3. Click **Import Options** to upload the file.
4. Under **Blocklist Selection**, click **Custom Blocklist**.
5. Select the custom blocklist to which you want to import the CSV file.



6. Under **Specify the Hash Algorithm Used in the Import File**, select your CSV file's hash algorithm. Select **None** if your CSV file entries use no hash algorithm.

> **Note:** The CSV file's hash algorithm must match the hash algorithm of the selected blocklist. If not, an error appears. Correct your selection under **Specify the Hash Algorithm Used in the Import File**. Or, under **Custom Blocklists**, change the hash algorithm of the custom blocklist. You may also create a new custom blocklist with the correct hash algorithm.

7. Under **Character Encoding and CSV Options**, you can change CSV file options. For more information, see Import blocklists.
8. Click the **Reason** button. You can optionally enter a reason for blocklisting the imported entries. The reason applies to all imported entries.
9. Click **Finished**.

Preference Center

The Preference Center lets recipients set their own preferences and update personal information. Do this through a form that you incorporate into your web presence as a standalone element, or integrate into a template using an iFrame.

Recipients can access the page via a website link or in a mailing, then edit their personal information. The information is transferred by REST API, SOAP API or HTTP API to Optimizely Campaign and stored in the recipient data. You can use the generated data to create lifecycle marketing campaigns and tailor-made mailings.

For example, mailing recipients can make the following settings in the Preference Center:

- Updating personal information (email address, name, postal address)
- Specifying interests
- Selecting topics (channels)
- Setting up the frequency of receiving mailings (for example, bi-weekly, monthly)

Requested data

Data that a recipient enters in his/her profile is considered voluntarily disclosed personal information. As long as this information is submitted voluntarily and not disclosed to third parties, there is no limit on the type of data you can request.

Ensure data minimization and transparency:

- The recipient should readily understand the purpose of the data request.
- Only request information that you need and that serves to optimize the service you are providing to the recipient.
- Indicate which information is mandatory and which is voluntary. See **Legal compliance**.

If you are already conducting email marketing through Optimizely Campaign, you can use the recipient lists in your client to see what recipient-based data is currently available. Users can edit this data in the Preference Center.

To optimize the content of your mailings, recipients should be provided with additional options. For example, you may want to furnish a listing of various areas of interest and allow the recipient to select one or more. Alternatively, you could offer several channels for the recipient to subscribe to. Through dynamic marketing, you can place specific content in mailings associated with each channel, content that only subscribers to those channels receive, while withholding content from channels to which the recipient has not subscribed.

Legal compliance

The data protection notice must contain information about the collection, storage, use and transfer of data. It must also reference the user's right to have data deleted and the obligation of the party collecting the data to provide information about that data. The text of a data protection notice need not be included on the form page itself. You can include a link to the appropriate page.

Although not mandatory, you should emphasize that none of the information collected is disclosed to third parties. The same applies to notifications about data security protection.

In email marketing, collect data from required email address fields *only* if it is essential for the purpose of distributing mailings; other fields, like **Recipient name**, should not be required. You should indicate the purpose for which personal information collected through the Preference Center is used. For example, you should emphasize that names are collected solely for the purpose of personalizing mailings. If you request address information, indicate that it is collected to provide news about offers limited to a specific geographic area and so on. There are no limits on the information you can collect except for email addresses and information must be provided voluntarily.

Exchanging data

The exchange of data between the Preference Center and Optimizely Campaign is carried out via REST API or SOAP API. When a recipient opens the Preference Center through a mailing, the recipient ID is transmitted and the recipient data contained in the Optimizely Campaign database is imported. When the recipient edits his/her profile, the updated data is transmitted back to Optimizely Campaign.

> **Note:** You can also use HTTP API for the Preference Center except that you cannot import recipient data into a web form. For example, you can forward the mailing ID and recipient ID (usually the email

> address) from a mailing, and record the recipient data in the data-base, but the recipient cannot view his/her old data.

If you link to the Preference Center from your website, you cannot identify the recipient ID. In this case, the recipient must first enter a recipient ID (usually the email address). The same rule applies: If you are using REST API or SOAP API, you can import recipient data, which you cannot do using HTTP API.

Form fields

Depending on the type of fields used, you can configure the Preference Center form fields in different ways. Fields into which text is entered are set up as text fields. These include the fields **Email Address** and **Name**. You can set up fields with fixed values as lists or check boxes. Fields that list interests or topics should allow for multiple selections. If only a single item may be selected (such as frequency of mailings), use either a drop-down list or a radio button. The available fields are:

Caption	Type	Required field	Standard
Email address (required)	single-line text field	✓	–
Last name	single-line text field	✗	–
First name	single-line text field	✗	–
Salutation	radio button, drop-down list	✗	–
Date of birth	data field with selection window	✗	–
Age	drop-down list (for example, B. 20-30, 30-40)	✗	–
Interests	list with check boxes	✗	–

Caption	Type	Required field	Standard
Mailing frequency (standard)	radio buttons (for example, weekly, bi-weekly, monthly)	✗	yes
Other fields, as requested	radio buttons, text fields, drop-down lists, check boxes	✗	–

Displaying error messages

Error messages should appear as text directly above/alongside/beneath the applicable form. Alternatively, these messages may also appear at the top of the page, referencing the applicable field. The field being referenced should be highlighted in color. The following provides several sample error messages:

Error	Error message
No email address entered	*Please enter an email address.*
Consent not provided	*You must indicate that you want to receive this newsletter.*
Required information not entered	*Please complete all required fields.*

Design/templates tips

Keep form pages simple and clearly arranged. Ideally, the user should not have to scroll to reach the bottom of a page. Fields in a form and the **Send** button should be arranged to display on standard screens and in commonly used font sizes without using the scroll bar.

If Optimizely creates and integrates a Preference Center for you, it is set up as a separate page. You can link directly to this page or integrate it into a template using an iframe. If you choose the latter option, you need to coordinate page width and height with customer support to make sure the content displays correctly.

To create a web form, provide Optimizely with a template in HTML format or a layout template and the accompanying error messages.

Security tips

Password protection

To protect recipient data from misuse, access to the Preference Center must be password protected. Make sure that users can only access the Preference Center (their data) after they verify authorization.

Changing email addresses

To prevent misuse, users should not be able to freely change their email address. The procedure used for changing email addresses could look like the following:

1. The recipient enters a new email address, which is saved temporarily.
2. A double opt-in process is initiated for the new email address.
3. The address is changed only after the recipient confirms the change. If not confirmed, the original email address is restored.

© Optimizely 2022

Analytics

This section describes Optimizely Campaign's analysis tools to gather statistics after dispatch, or check and optimize your mailings before you send them. If you want to use third-party analysis tools, see Web analytics integrations.

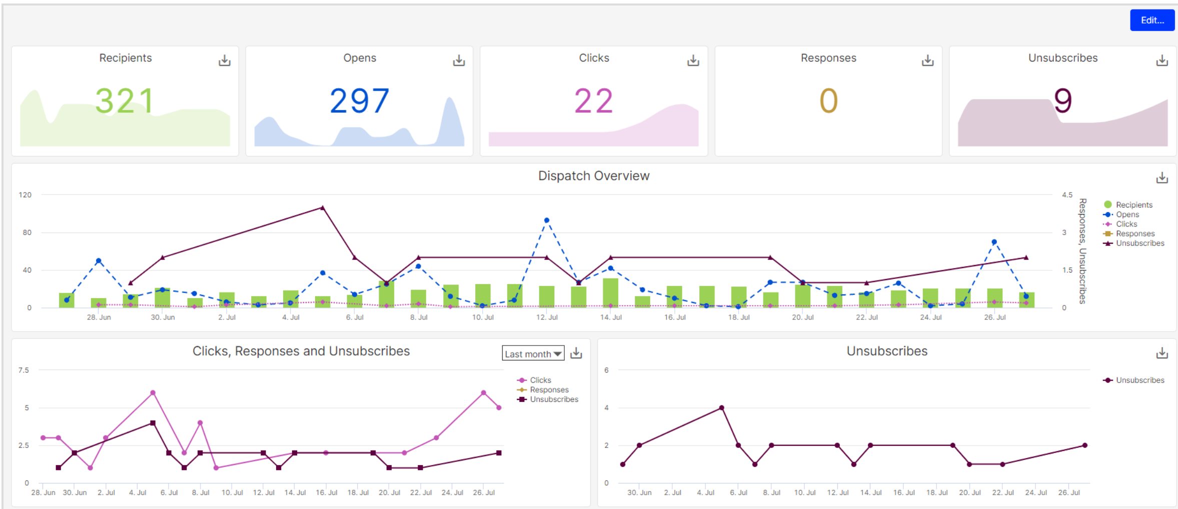
- Performance Dashboard (Beta). Create a graphical overview of your marketing activities.
- Deep Analytics. Create cross-client analyses with more than 30 measurement variables.
- Live Analytics. Create RFM analyses.
- Deliverability preview. Check displays and spam suspicion with the most important email providers before dispatch.
- Post-click tracking. Analyze actions of recipients on your website.
- Visual link analysis. Graphically display link clicks.
- Visual link analysis of post clicks. Graphically display sales volume and number of orders generated via a link.
- Attention analysis. Create heat maps.
- Activity overview. Display marketing activities within a defined period.

> **Tip:** Using webhooks, you can also externally process real-time event data on sent mailings, opens, and clicks.

Performance Dashboard (Beta)

The Performance Dashboard gives you an overview of your mailing activities. Customize the Performance Dashboard and use it for example for graphically appealing presentations.

© Optimizely 2022



To open the Performance Dashboard, open the Optimizely Campaign menu and select **Analytics** > **Performance Dashboard (Beta)**.

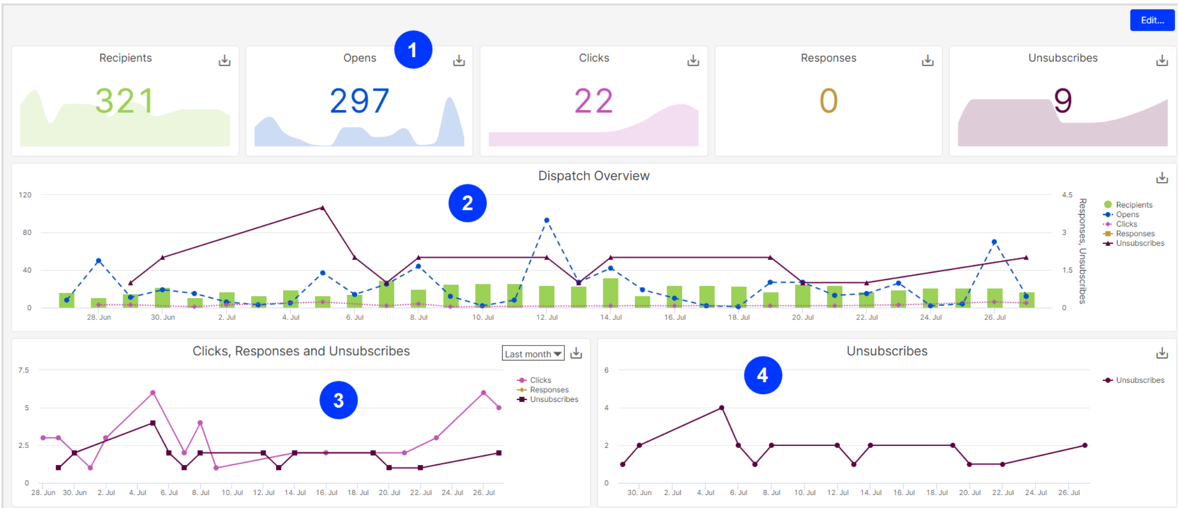
> **Tip:** All users of a client have the same access permission to the Performance Dashboard.

You can display the following widgets in the Performance Dashboard:

- KPI chart (time-based). A simple diagram to illustrate a KPI. KPI charts consist of a graphically highlighted key figure and a diagram behind it.
- Basic chart (time-based). Has more configuration options than a KPI chart and is especially suitable for analysis and comparison of different KPIs (2 dimensions).
- Basic chart (mailing-based). Two-dimensional basic chart that, unlike the time-based basic chart, allows analysis based on selected mailings.
- Bubble chart (mailing-based). Display of different KPIs as colored bubbles (3 dimensions).

By default, the following widgets are displayed:

1. KPI charts *Recipients*, *Opens*, *Clicks*, *Responses* and *Unsubscribes*
2. Basic chart *Dispatch Overview* with a complete overview of all KPIs
3. Basic chart *Clicks, Responses, Unsubscribes*
4. Basic chart *Unsubscribes*



You can customize and export each widget directly in the Performance Dashboard overview or configure it individually in edit mode.

> **Tip:** Hover over a specific day or mailing in the graph to view the corresponding KPIs and metrics.

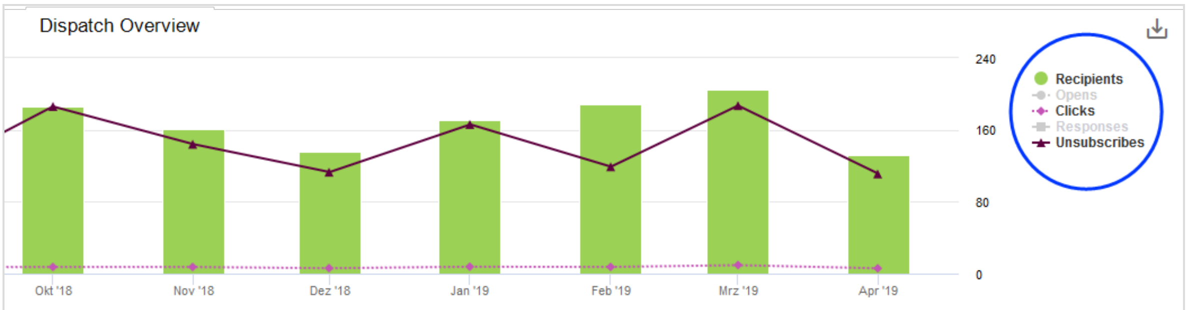
Widget features

You can customize the diagram display of each widget directly in the Performance Dashboard to show or hide data series, set time periods, and zoom in on areas. You can also export widgets as an image file, PDF or CSV.

Showing or hiding data series

> **Note:** This function is not available for the widget type *KPI chart*.

To show or hide series in diagrams with several KPIs, click the respective series titles in the right list.



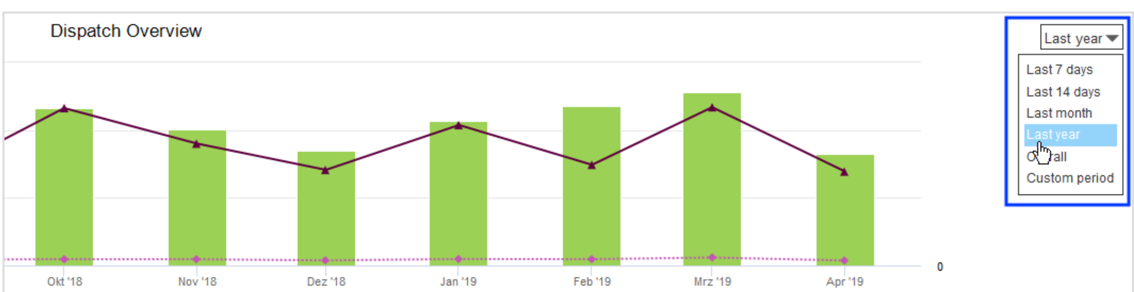
Setting time periods

> **Note:** This function is only available for widget types *KPI chart* and *Basic chart (time-based).*

The KPIs displayed in the widgets *KPI chart* and *Basic chart (time-based)* are absolute values and refer to all messages of a client in the selected time period.

To set the time period:

1. Hover over the widget for which you want to change the time period. A drop-down list appears.



2. Select one of the following options:
   - **Last 7 days**. Data source are the last seven days.
   - **Last 14 days**. Data source are the last 14 days.
   - **Last month**. Data source is the last month. Example: On April 17, the period goes back to March 17.

- **Last year**. Data source is the entire last year. Example: On April 17, 2019, the period goes back to April 17, 2018.
- **Overall**. Data source is the entire period recorded in the client.
- **Custom period**. Define a time period.

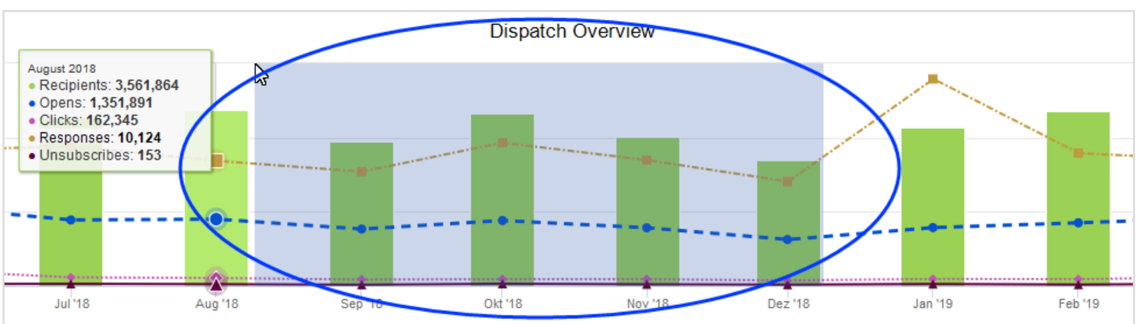
Zoom

> **Note:** This function is not available for the widget type *KPI chart*.

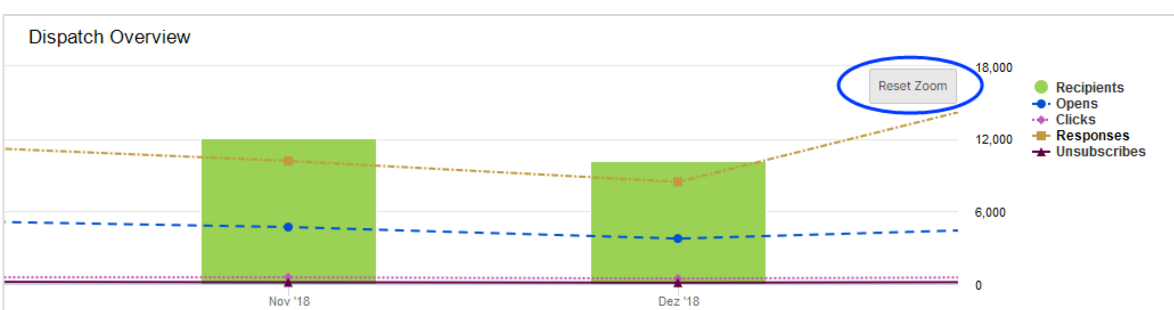
The zoom function lets you zoom in on areas in the widget type *Basic chart*, and enlarge and display bubbles more precisely in the widget type *Bubble chart*.

To use the zoom function:

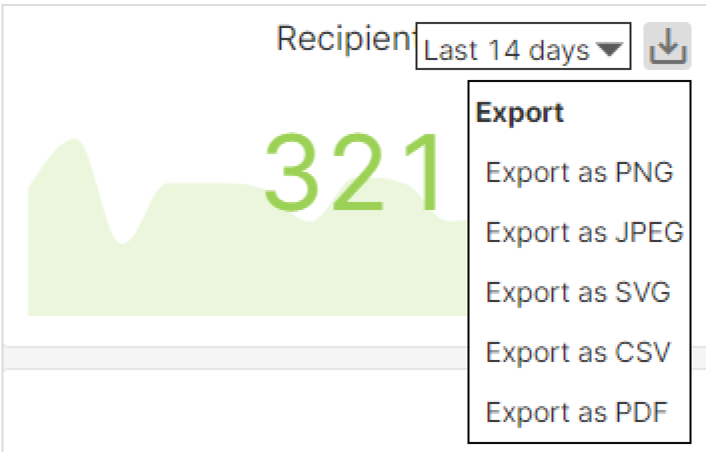
1. Move the cursor to the start or end point where you want to zoom in.
2. Hold the left mouse button and move to the left or right to define the area you want to zoom in.



3. Repeat step 2 to zoom in closer.
4. Click **Reset Zoom** to reset the chart to the original setting.



Exporting widgets



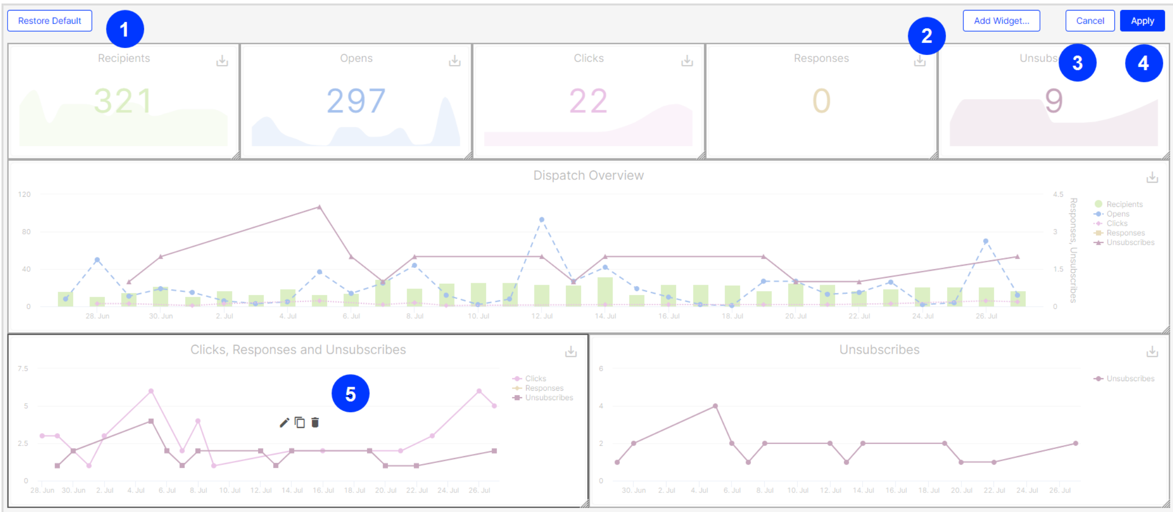
You can export widgets as an image file, PDF or CSV file. Do the following:

1. Click the export icon in the upper right corner of the widget you want to export.
2. Select one of the following file formats from the drop-down list: PNG, JPEG, SVG, CSV or PDF.

> **Tip:** Exported image files have the double image format of the displayed widget. When you export a CSV file, the data sources shown in the graph are sorted either by date (for time-based graphs) or by recipient number (for mailing-based graphs).

Edit mode

In edit mode, you can customize, move, delete or add widgets, or rebuild your Performance Dashboard from scratch. In Performance Dashboard overview, click **Edit...** to open the edit mode.



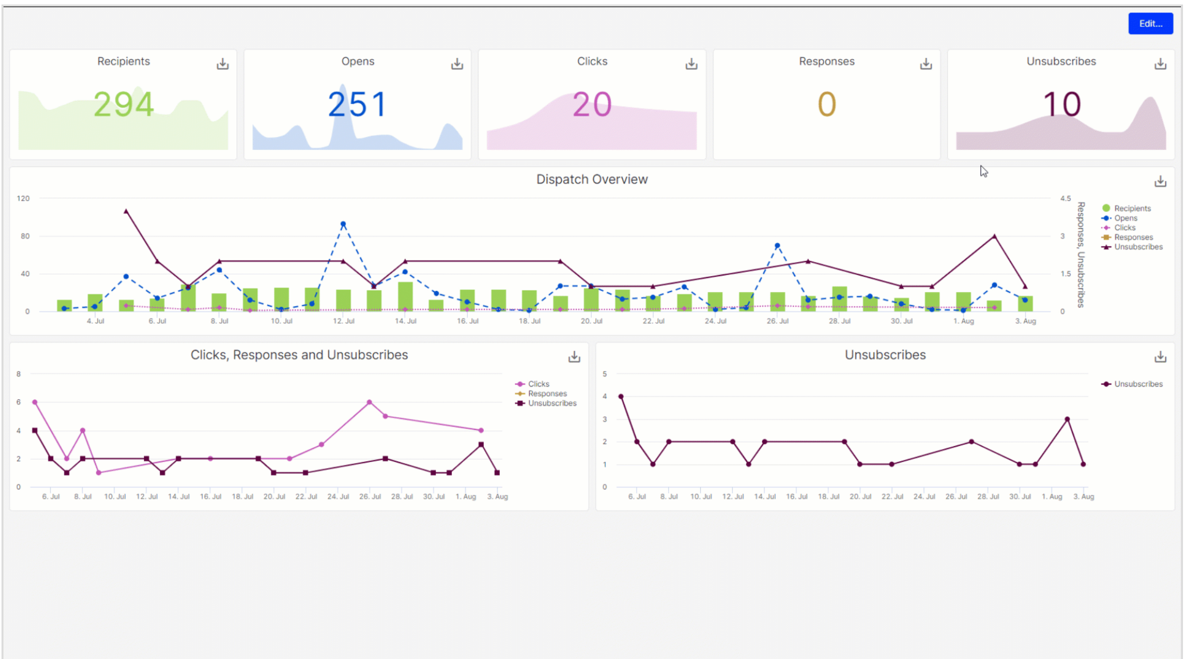
The following options are available:

1. **Restore Default**. Discard all changes made to the Performance Dashboard and restore the default settings.
2. **Add Widget...**. In the **Widget Type** drop-down list, select *KPI chart*, *Basic chart (time-based)*, *Basic chart (mailing-based)* or *Bubble chart*. Make the desired settings for the new widget and click **Apply**. The new widget will insert either below or between the existing widgets, depending on its size and on the space available on the Performance Dashboard.
3. **Cancel**. Discard your changes and return to the Performance Dashboard overview.
4. **Apply.** Apply your changes and return to the Performance Dashboard overview.
5. **Edit**, **Copy**, **Delete** . Hover over a widget. The following options are displayed:
   - **Edit** . Open the **Edit widget** window. See Editing widgets.
   - **Copy** . Open the **Copy widget** window. Customize the copy (See Editing widgets) and click **Apply**. The copied widget will insert either below or between the existing widgets, depending on its size and on the space available on the Performance Dashboard.
   - **Delete** . The selected widget is deleted.

Customizing widgets

In edit mode, you can customize widgets and change their position and size:

- **Change position**. Hold the left mouse button and drag a widget to a free space.
- **Change size**. Drag the right side or bottom side of a widget to change the height or width of the widget. The lower right corner lets you adjust the height and width of a widget at the same time.



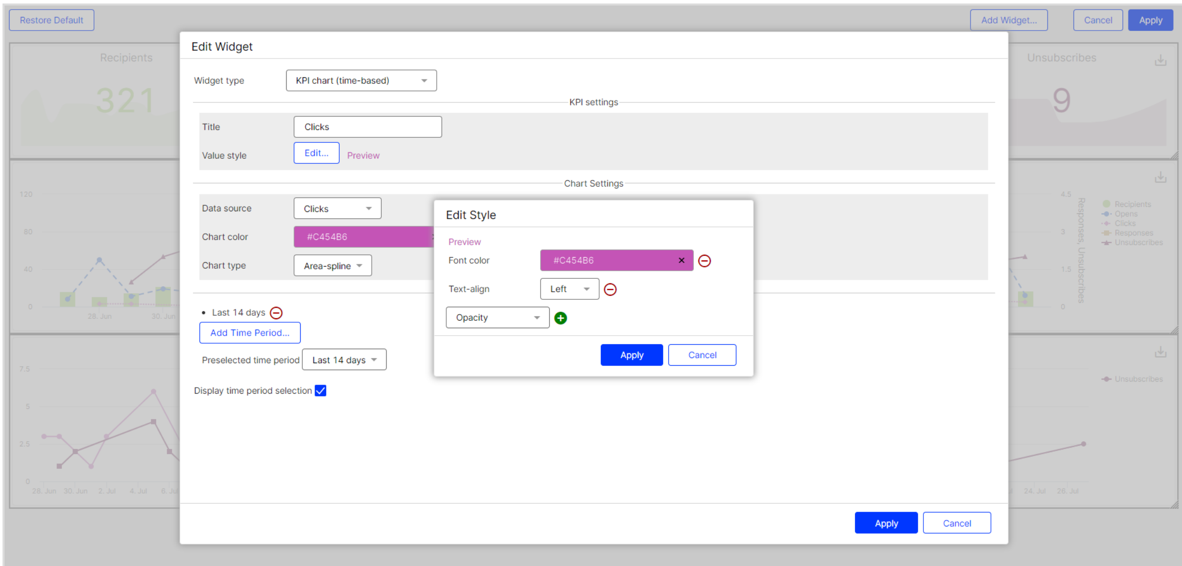
Editing widgets

You can edit either a new, an existing or a copy of a widget.

In edit mode, double-click a widget or hover over a widget and click **Edit** . A window opens with the settings of the respective widget type: KPI chart, Basic chart (time-based) , Basic chart (mailing-based) or Bubble chart.

KPI chart settings

In edit mode, double-click a widget or hover over a widget and click **Edit** .



You can make the following settings:

- **Title**. Title of the KPI chart. It is displayed centered in a predefined font size. Leave the field blank if you do not want to display a title.
- **Value type**. Define the output type of your data source.
  - **Sum**. Sums up the data of the selected data source. (Example: A total of 955,000 messages were opened.)
  - **Average**. Calculates the average of the selected data. (Example: An average of 120,000 messages were opened per day.)
  - **Minimum**. Displays the lowest value of the data source of a day within the selected time period. (Example: The minimum number of open mails is 465.)
  - **Maximum**. Displays the highest value of the data source of a day within the selected time period. (Example: The maximum number of open mails is 511,000.)
- **Value style**. Define the style in which the key figure is to be displayed. Click **Edit...** and in the **Edit Style** window, select the property you want to edit from the drop-down list. Click **Plus** to add the property to the style set.
  - **Font color**. Define the font color by entering a hexadecimal value preceded by `#` (for example `#000000`). Alternatively, you can specify a color value using the color selector.
  - **Opacity**. Set a value between `0` and `1` for the opacity of the key figure.

   - **Background color**. The background is displayed in the form of a colored stripe behind the key figure. Define the font color by entering a hexadecimal value preceded by `#` (for example `#000000`). Alternatively, you can specify a color value using the color selector.
   - **Text-align**. Place the key figure on the left, centered or to the right of the widget. By default, the key figure is centered.
   - **Border**. In the text field, enter a CSS standard frame definition, such as `2px dotted orange` for a 2 pixel wide, orange dotted frame.
   - **Padding**. Specify a pixel value to change the vertical position of the key figure, for example, `20px` (the higher the pixel value, the lower the position of the key figure).
   - **Font size**. The font size is calculated automatically. Changes do not affect the output.
- **Data source**. Select the KPI you want to create a KPI chart for. The KPIs are absolute values and refer to the messages stored in your client.
   - **Recipients**. Number of recipients to whom messages are sent.
   - **Clicks**. Clicked Links.
   - **Opens**. Opened messages.
   - **Responses**. Messages that return to the sending mail server (including reply, autoresponder, hard and soft bounce).
   - **Unsubscribes**. Registered unsubscribes.
- **Chart color**. Color of the chart displayed in the background of the KPI chart. Define the font color by entering a hexadecimal value preceded by `#` (for example `#000000`). Alternatively, you can specify a color value using the color selector.

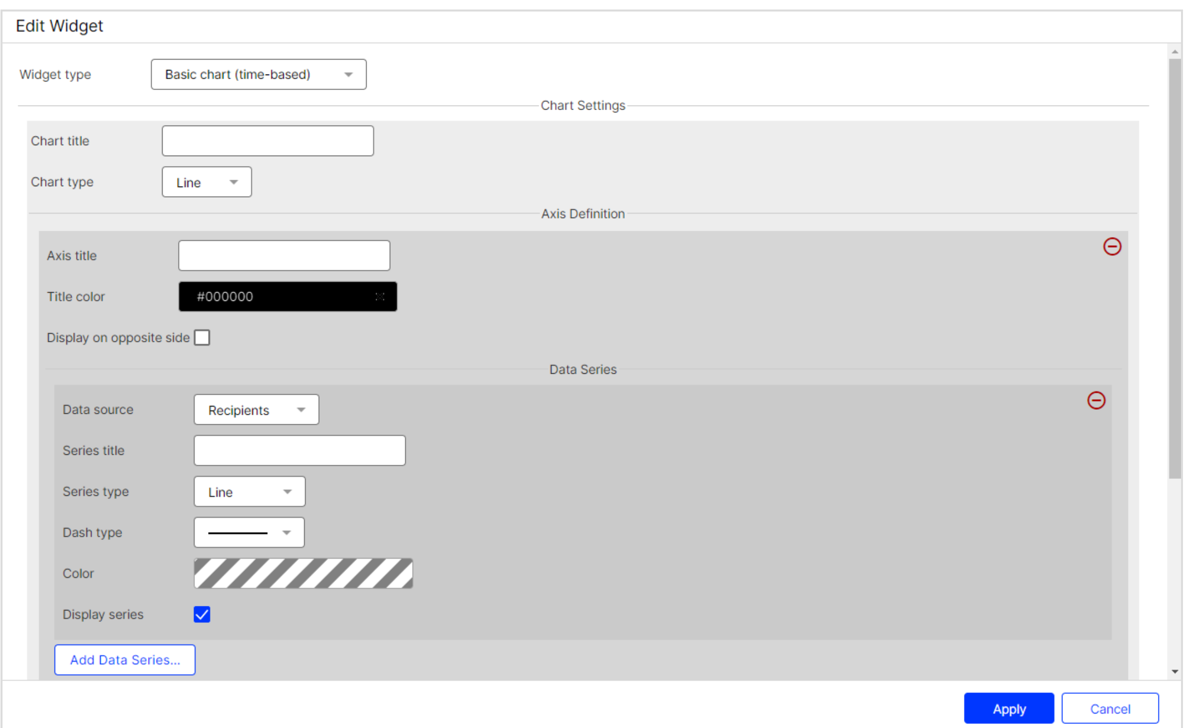
   > **Note:** For better readability, the diagram color is slightly transparent. This results in color changes (for example red becomes pink).

- **Chart type**.
   - **Area-spline**. Line chart with rounded corners and colored area.
   - **Area**. Line chart with colored area.
   - **Line**. Line chart.
   - **Spline**. Line chart with rounded corners.

- **Time Period Options**.
  - **Add Time Period...**. Add a custom time period.
    - **Title**. Enter a name for the newly created period.
    - **Type**. Select whether you want the time period to be absolute or dynamic.
    - **From/To (Absolute)**. Specify a start date and an end date.
    - **From/To (Dynamic)**. Starting from the current date, specify a time period in days. Use minus values to go back in the past.
  - Click **Minus** to remove periods from the selection.
  - **Preselected time period**. Specify which period is to be displayed by default.
  - **Display time period selection**. Show or hide the drop-down list for time period selection in the Performance Dashboard overview.

Basic chart settings (time-based)

In edit mode, double-click a widget or hover over a widget and click **Edit** .



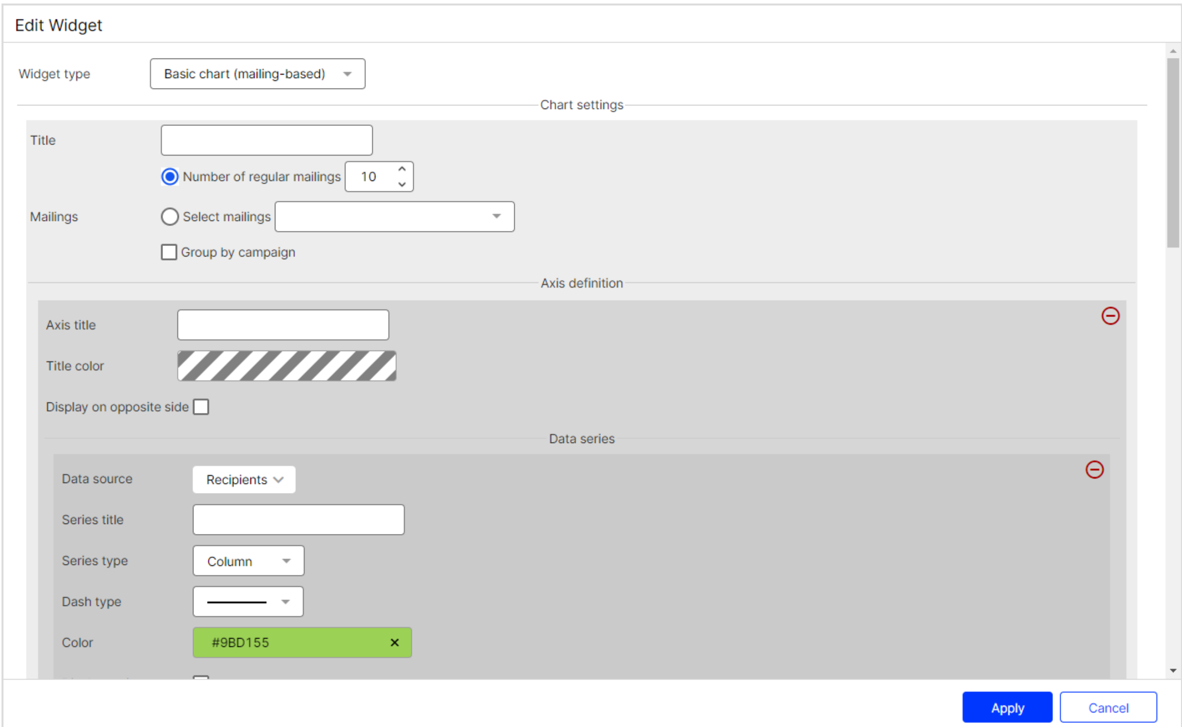
You can make the following settings:

- **Chart title**. Title of the chart. It is displayed centered in a predefined font size. Leave the field blank if you do not want to display a title.
- **Chart type**.
  - **Bar**. Display as bar chart.
  - **Line**. Display as line chart.
  - **Column**. Display as column chart.
- **Axis title**. Title of the Y-axis of the diagram. Leave the field blank if you do not want to display a title.
- **Title color**. Select a color for the axis title. Define the font color by entering a hexadecimal value preceded by `#` (for example `#000000`). Alternatively, you can specify a color value using the color selector.
- **Display on opposite side**. By default, the axis title is on the left side. Enable this option to display the axis title on the right side.
- **Data source**. Select the KPI you want to create a KPI chart for. The KPIs are absolute values and refer to the messages stored in your client.
  - **Recipients**. Number of recipients to whom messages are sent.
  - **Clicks**. Clicked Links.
  - **Opens**. Opened messages.
  - **Responses**. Messages that return to the sending mail server (including reply, autoresponder, hard and soft bounce).
  - **Unsubscribes**. Registered unsubscribes.
- **Series title**. Enter a significant name for the created chart.
- **Series type**. Select the display format of the chart.
  - **Area**. Line chart with colored area.
  - **Area-Spline**. Line chart with rounded corners and colored area.
  - **Column**. Column chart.
  - **Line**. Line chart.
  - **Spline**. Line chart with rounded corners.
  - **Scatter**. Values are displayed as separate points.
- **Dash type**. Select the desired dash type from the drop-down list.
- **Color**. Select a color for the displayed chart. Define the font color by entering a hexadecimal value preceded by `#` (for example `#000000`). Alternatively, you can specify a color value using the color selector.

- **Display series**. Disable this option to hide the graph. You can reactivate a hidden data series in the Performance Dashboard overview at any time.
- **Add Data Series**. Click **Add Data Series...** to add another graph.
- **Add Axis Definition**. Click **Add Axis Definition...** to add another Y-axis to the graph. The scale of the new Y-axis depends on the data series you create under this axis definition.
- **Time Period Options**.
  - **Add Time Period...**. Add a custom time period.
    - **Title**. Enter a name for the newly created period.
    - **Type**. Select whether you want the time period to be absolute or dynamic.
    - **From/To (Absolute)**. Specify a start date and an end date.
    - **From/To (Dynamic)**. Starting from the current date, specify a time period in days. Use minus values to go back in the past.
  - Click **Minus** ⊖ to remove periods from the selection.
  - **Preselected time period**. Specify which period is to be displayed by default.
  - **Display time period selection**. Show or hide the drop-down list for time period selection in the Performance Dashboard overview.

Basic chart settings (mailing-based)

In edit mode, double-click a widget or hover over a widget and click **Edit** ✏.



You can make the following settings:

- **Title**. The title of the bubble chart. It is displayed centered in a predefined font size. Leave the field blank if you do not want to display a title.
- **Mailings**.
  - **Number of regular mailings**. Enter the number of most recently created regular mailings that you want to display. Transactional mails, test mails, and confirmation mails are excluded.
  - **Select mailings**. Select one or more mailings. You can select transactional mails as well as regular mailings.
  - **Group by campaign**. Select the check box to group the selected mailings according to the assigned campaign.
- **Axis Definition**.
  - **Axis title**. Title of the Y-axis of the diagram. Leave the field blank if you do not want to display a title.

- **Title color**. Select a color for the axis title. Define the font color by entering a hexadecimal value preceded by `#` (for example `#000000`). Alternatively, you can specify a color value using the color selector.
- **Display on opposite side**. By default, the axis title is on the left side. Enable this option to display the axis title on the right side.
- **Data source**. Select the KPI you want to create a KPI chart for. The KPIs are absolute values and refer to the messages stored in your client.
  - **Recipients**. Number of recipients to whom messages are sent.
  - **Opens**. Opened messages.
    - **(absolute)**. Total number of opens.
    - **(unique)**. Total number of unique opens. Multiple opens by a recipient are seen as a unique open.
    - **(absolute) in %**. Percentage of total opens in relation to the number of recipients.
    - **(unique) in %**.Percentage of unique opens in relation to the number of recipients.
  - **Clicks**. Clicked links.
    - **(absolute)**. Total number of clicks.
    - **(unique)**. Total number of unique recipients that clicked an arbitrary link in a mailing. It does not matter how often and which link was clicked.
    - **(absolute) in %**. Percentage of total clicks in relation to the number of recipients.
    - **(unique) in %**. Percentage of unique clicks in relation to the number of recipients.
  - **Bounces**. Messages for which bounces have been registered, including soft and hard bounces.
    - **(absolute)**. Total number of bounces.
    - **(unique)**. Total number of unique bounces.
    - **(absolute) in %**. Percentage of total bounces in relation to the number of recipients.
    - **(unique) in %**. Percentage of unique bounces in relation to the number of recipients.
  - **Soft bounces**. Messages for which soft bounces have been registered.

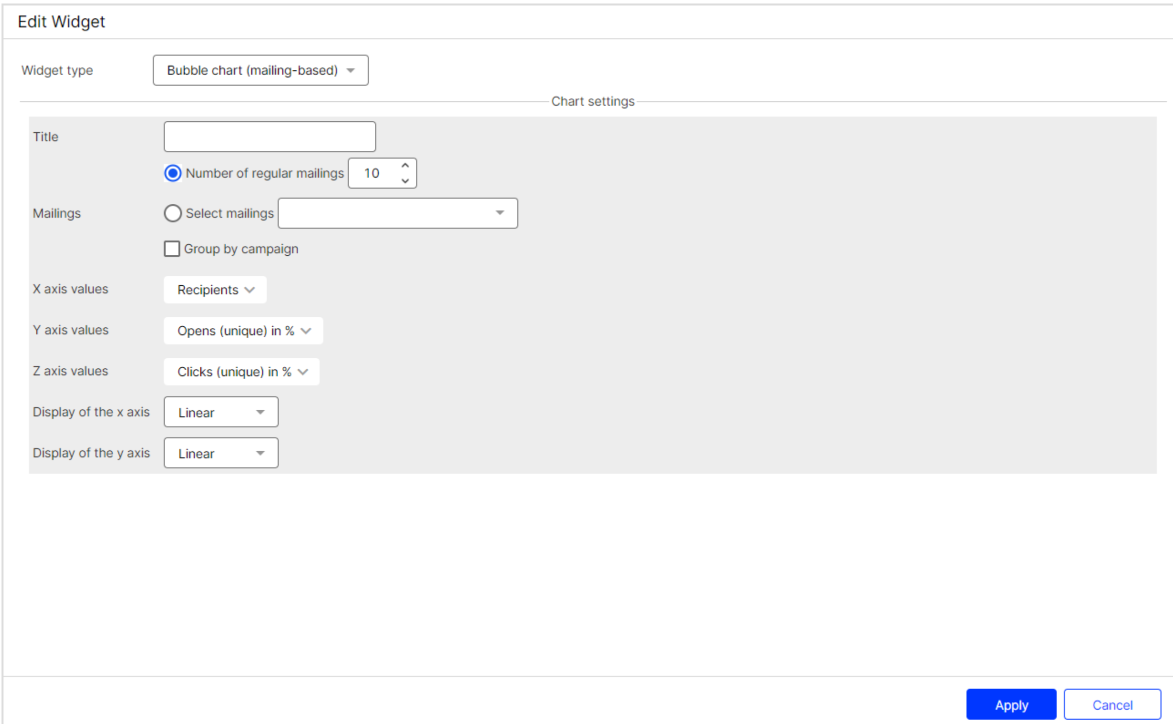
© Optimizely 2022

        - **(absolute)**. Total number of soft bounces.
        - **(unique)**. Total number of unique soft bounces.
        - **(absolute) in %**. Percentage of total soft bounces in relation to the number of recipients.
        - **(unique) in %**. Percentage of unique soft bounces in relation to the number of recipients.
    - **Hard bounces**. Messages for which hard bounces have been registered.
        - **(absolute)**. Total number of hard bounces.
        - **(unique)**. Total number of unique hard bounces.
        - **(absolute) in %**. Percentage of total hard bounces in relation to the number of recipients.
        - **(unique) in %**. Percentage of unique hard bounces in relation to the number of recipients.
    - **Responses**. Messages that return to the sending mail server (including reply, autoresponder, hard and soft bounce).
        - **(absolute)**. Total number of responses.
        - **(unique)**. Total number of unique responses.
        - **(absolute) in %**. Percentage of total responses in relation to the number of recipients.
        - **(unique) in %**. Percentage of unique responses in relation to the number of recipients.
    - **Unsubscribes**. Registered unsubscribes.
        - **(absolute)**. Total number of unsubscribes.
        - **(unique)**. Total number of unique clicks on an unsubscribe link.
        - **(absolute) in %**. Percentage of total unsubscribes in relation to the number of recipients.
        - **(unique) in %**. Percentage of unique clicks on an unsubscribe link in relation to the number of recipients.
- **Series title**. Enter a significant name for the created chart.
- **Series type**. Select the display format of the chart.
    - **Area**. Line chart with colored area.
    - **Area-Spline**. Line chart with rounded corners and colored area.

        - **Column**. Column chart.
        - **Line**. Line chart.
        - **Spline**. Line chart with rounded corners.
        - **Scatter**. Values are displayed as separate points.
    - **Dash type**. Select the desired dash type from the drop-down list.
    - **Color**. Select a color for the displayed chart. Define the font color by entering a hexadecimal value preceded by `#` (for example `#000000`). Alternatively, you can specify a color value using the color selector.
    - **Display series**. Disable this option to hide the graph. You can reactivate a hidden data series in the Performance Dashboard overview at any time.
    - **Add Data Series**. Click **Add Data Series...** to add another graph.
    - **Add Axis Definition**. Click **Add axis Definition...** to add another Y-axis to the graph. The scale of the new Y-axis depends on the data series you create under this axis definition.

Bubble chart settings

In edit mode, double-click a widget or hover over a widget and click **Edit** .



You can make the following settings:

- **Title**. The title of the bubble chart. It is displayed centered in a predefined font size. Leave the field blank if you do not want to display a title.
- **Mailings**.
  - **Number of regular mailings**. Enter the number of most recently created regular mailings that you want to display. Transactional mails, test mails, and confirmation mails are excluded.
  - **Select mailings**. Select one or more mailings. You can select transactional mails as well as regular mailings.
  - **Group by campaign**. Select the check box to group the selected mailings according to the assigned campaign.
- **X, Y, Z axis values**.
  - **Recipients**. Number of recipients to whom messages are sent.
  - **Opens**. Opened messages.

    - **(absolute)**. Total number of opens.
    - **(unique)**. Total number of unique opens. Multiple opens by a recipient are seen as a unique open.
    - **(absolute) in %**. Percentage of total opens in relation to the number of recipients.
    - **(unique) in %**.Percentage of unique opens in relation to the number of recipients.
  - **Clicks**. Clicked links.
    - **(absolute)**. Total number of clicks.
    - **(unique)**. Total number of unique recipients that clicked an arbitrary link in a mailing. It does not matter how often and which link was clicked.
    - **(absolute) in %**. Percentage of total clicks in relation to the number of recipients.
    - **(unique) in %**. Percentage of unique clicks in relation to the number of recipients.
  - **Bounces**. Messages for which bounces have been registered, including soft and hard bounces.
    - **(absolute)**. Total number of bounces.
    - **(unique)**. Total number of unique bounces.
    - **(absolute) in %**. Percentage of total bounces in relation to the number of recipients.
    - **(unique) in %**. Percentage of unique bounces in relation to the number of recipients.
  - **Soft bounces**. Messages for which soft bounces have been registered.
    - **(absolute)**. Total number of soft bounces.
    - **(unique)**. Total number of unique soft bounces.
    - **(absolute) in %**. Percentage of total soft bounces in relation to the number of recipients.
    - **(unique) in %**. Percentage of unique soft bounces in relation to the number of recipients.
  - **Hard bounces**. Messages for which hard bounces have been registered.
    - **(absolute)**. Total number of hard bounces.
    - **(unique)**. Total number of unique hard bounces.
    - **(absolute) in %**. Percentage of total hard bounces in relation to the number of recipients.

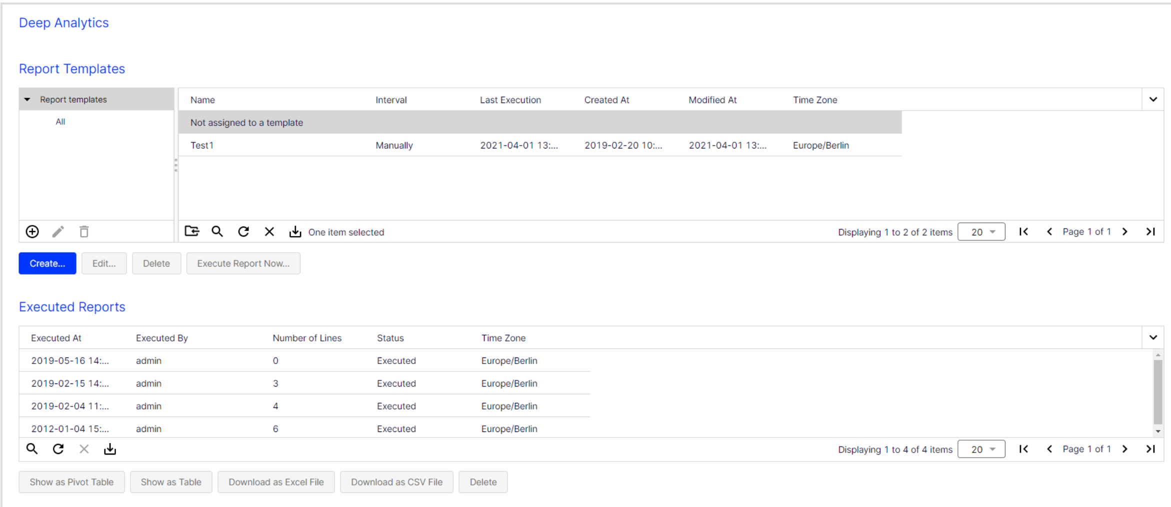
© Optimizely 2022

        - **(unique) in %**. Percentage of unique hard bounces in relation to the number of recipients.
    - **Responses**. Messages that return to the sending mail server (including reply, autoresponder, hard and soft bounce).
        - **(absolute)**. Total number of responses.
        - **(unique)**. Total number of unique responses.
        - **(absolute) in %**. Percentage of total responses in relation to the number of recipients.
        - **(unique) in %**. Percentage of unique responses in relation to the number of recipients.
    - **Unsubscribes**. Registered unsubscribes.
        - **(absolute)**. Total number of unsubscribes.
        - **(unique)**. Total number of unique clicks on an unsubscribe link.
        - **(absolute) in %**. Percentage of total unsubscribes in relation to the number of recipients.
        - **(unique) in %**. Percentage of unique clicks on an unsubscribe link in relation to the number of recipients.
- **Display of the x and y axis**.
    - **Linear**. The axis values are displayed linearly - in successive steps.
    - **Logarithmic**. The axis values are displayed exponentially.

Deep Analytics

Deep Analytics is a report suite that you can configure to measure the success of your campaigns and evaluate mailings in detail. Select measures and group them by time period, target groups, click profile, and other factors.

To manage reports and report templates, open the Optimizely Campaign menu and select **Analytics** > **Deep Analytics**.



Tip: Up-to-date data

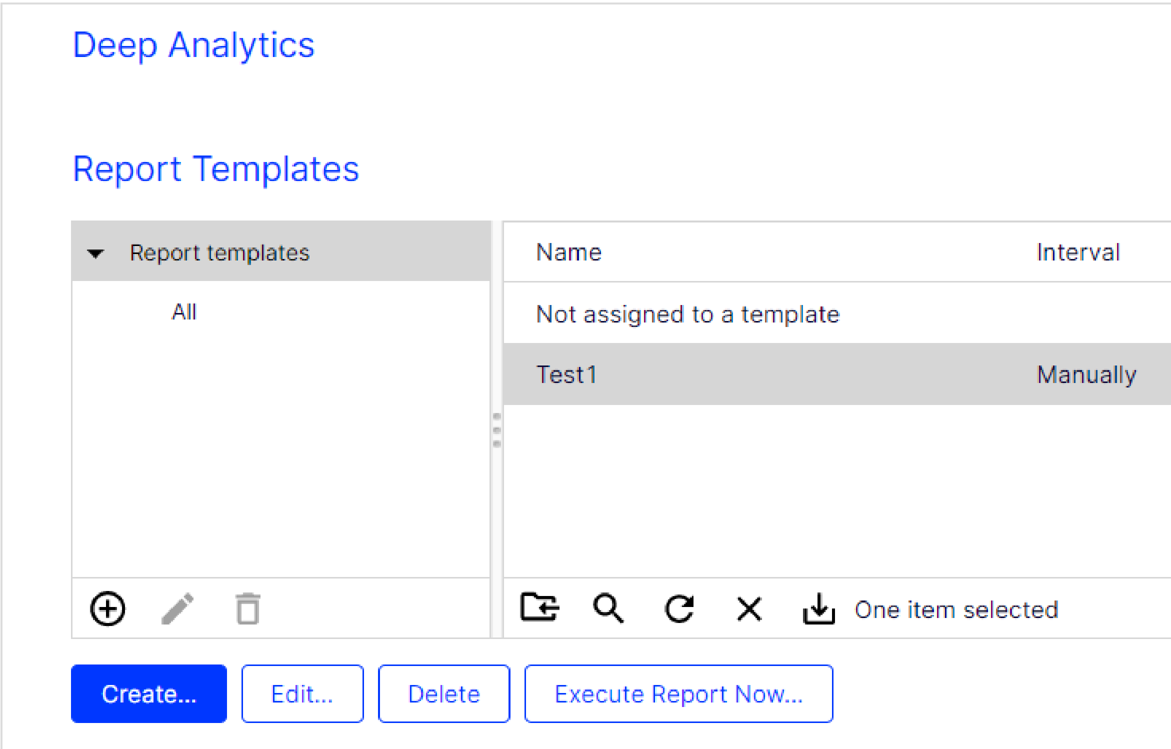
When you execute a Deep Analytics report, it aggregates up-to-date data. The report's measures may vary slightly from those in the mailing overview, because the data is not aggregated at each request, but in fixed chronological intervals.

Learn more:

- Creating report templates
- Executing reports
- Displaying reports
- Opening CSV files with Excel
- Pivot tables

Creating report templates

To create a new report template, click **Create...**.



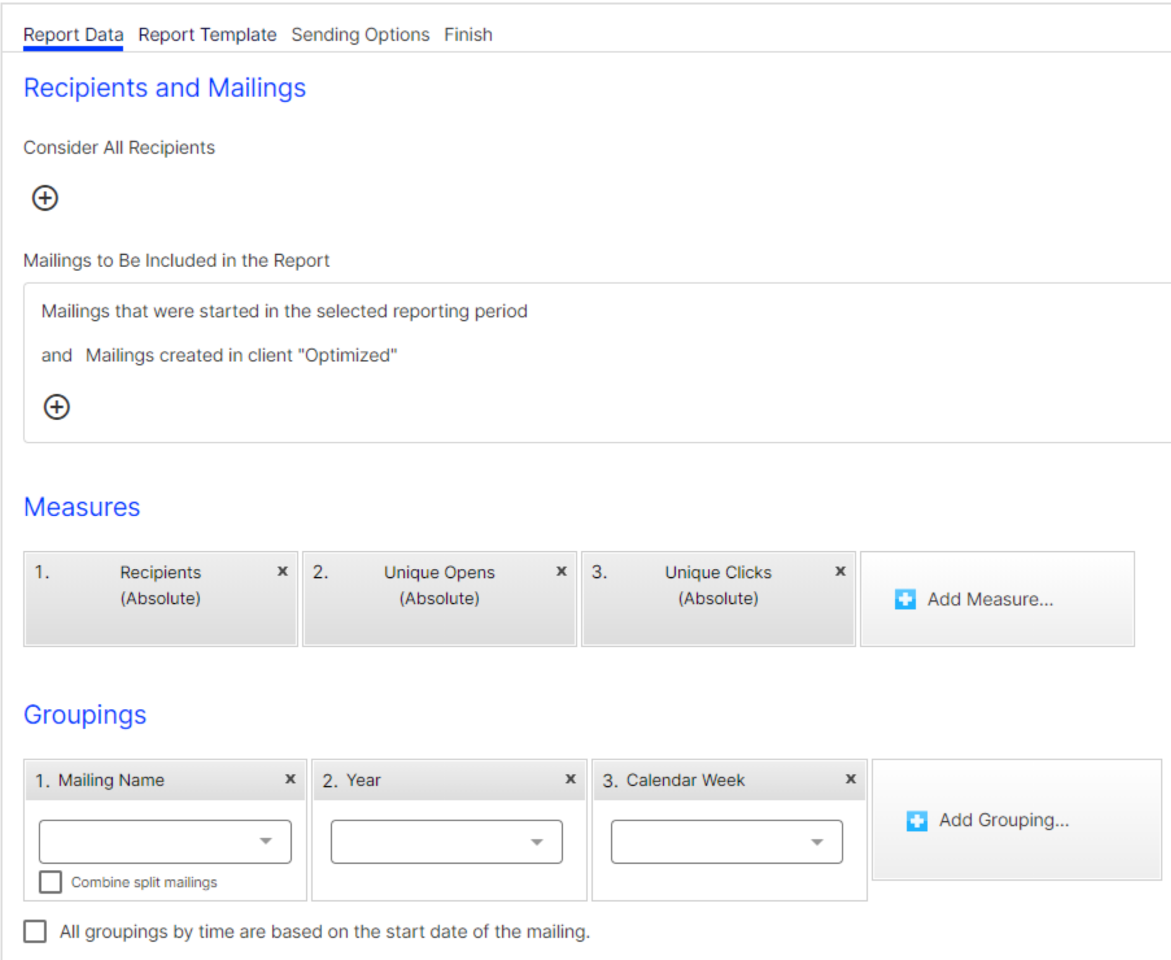
The creation process consists of 3 steps:

- Step 1. Selecting report data
- Step 2. Configuring the report template
- Step 3. Sending the report

> **Note:** To delete a report template, click a report template in the **Report Templates** list then click **Delete**. Deleting or changing a template does not affect already executed reports. Reports that are executed from deleted templates are shown as **Not assigned to a template** in the list.

Step 1. Selecting report data

The **Report Data** tab lets you define which data is evaluated in a report. You can specify recipients, mailings, measures, and groupings.



Recipients and mailings

In the **Recipients and Mailings** area, define recipient segments, mailings, and clients that you want to analyze. If you do not perform the following steps, relevant data is used for the report.

1. To analyze recipients by target group, click **Add** below **Consider All Recipients**.
2. In the list, select a target group and click **OK**.

3. Repeat these steps to use multiple target groups for this report.

   > **Note:** Selected target groups are applied to selected clients when the report is executed. This may lead to unwanted results if a target group uses filter rules that do not match recipients in selected clients. See the following mailing example to learn more.

4. To analyze certain mailings, click **Add** below **Mailings to Be Included in the Report:**.
5. To create an exclusive condition (such as *is not*, *contains not*, *has not*), in the left drop-down list, select **not**.
6. In the next drop-down list, you can select the following options.
   - **(...)**. Create nested conditions by clicking the parentheses.
   - **Client**. Only available if you have access to more than one client. By default, the client to which you are logged in is selected.
   - **Folder**. Only mailings from specific folders.
   - **Mailing**. Only specific mailings.
   - **Mailing type**. Select one or more mailing types:
     - **Regular**. Optimized mailings of an A/B test (Smart Campaigns) and mailings from Mailings Classics (deprecated).
     - **Special**. Transactional mails.
     - **Transactional message**. Split mailing of a transactional mail. See A/B test for transactional mails.
     - **Confirmation email**. Confirmations.
     - **Split**. Split mailings from Mailings Classics (deprecated).
     - **Campaign**. Mailings and split mailings of a Smart Campaign (without optimized mailings).

     > **Tip:** To select all mailings of an A/B test in a Smart Campaign, select both options **Regular** (to select the optimized mailing) and **Campaign** (to select the split mailings).

   - **Start date**. Select the start date in the next step.

- **Reporting period**. A reporting period lets you specify the time frame from which data is collected and used for the analysis. By default, only mailings started in the given period are analyzed. If you remove this filter, also opens, clicks, unsubscribes, responses and post clicks that are created from mailings started prior to the reporting period but were only opened, clicked, unsubscribed, and so on within the given period, are analyzed. For the **mailings** and **recipients** measures, this difference is irrelevant.

7. In the next drop-down list, click the value for the selected filter option.
8. To combine several conditions, click **Add** to add a new condition. Between two conditions, an **AND** or **OR** logic relation appears, which you can change by clicking it.

> **Note:** Due to correctness and logical disambiguation, target groups without parentheses can contain only one type of logic relation. Thus, if you click a relation, relations between the rules are changed. If you want to use different types of logic relations, use parentheses.
>
> Parentheses group rules hierarchically to handle them with priority, like in a mathematical equation. Rules within the parentheses are applied first, followed by rules in the second level, and so on. Parentheses are especially useful if a complex condition is planned and different logic terms (**AND** or **OR**) will be used.

9. Click **OK**.

Measures and groupings

Measures "measure" the success of your campaigns and evaluate mailings in detail. Select measures and group them by time period, target groups, click profile, and other factors.

Example: To get an overview of your past mailing activities, you can select in **Measures** the unique number of recipients, the unique number of opens and, for example, the number of unique clicks. In **Groupings**, under **Date or Time**, you can select **Year**, **Calendar week** and **Date** to group the Measure data by time period.

Measures

A measure is defined as a numerical measure of a user interaction (for example openings, clicks or unsubscribes) or characteristic of your mailing (recipients number, sent emails, responses). Measures have the following characteristics:

- Measures are expressed in form of a number.
- Measures are stand-alone entities. If you look at a metric in a stand-alone fashion, it provides information about the overall performance of your mailing.
- Measures form the columns of a report structure.
- You can combine measures in a report.

> **Tip:** For a description of available measures, see Measures.

In the **Measures** area, define measures to be evaluated for this report:

1. Click **Add Measure...** .
2. Select a measure from the menu.
3. Repeat these steps for measures you want to analyze.

> **Tip:** You can drag and drop a measure to the desired position if you want to change it.

Groupings

Groupings (dimensions) have the following characteristics:

- Groupings are non-numerical data fields.
- Unlike measures, groupings are not stand-alone entities, that is, they are not generally meaningful when viewed individually.
- Groupings, when coupled with measures, provide meaningful context to the data.
- Groupings are used to segment a measure.

> **Tip:** For an overview and a description of all available groupings, see Groupings.

In the **Grouping** area, select groupings with which the measures will be matched:

1. Click **Add Grouping...** .
2. Select a grouping from the menu.
3. In the list, select a value (for example, *HM TargetGroup*) if you want to specify the grouping more exactly.
4. Repeat these steps for groupings the report will evaluate.

Time-based reports

To arrange recipient-specific actions (such as, opens) for a mailing according to the start date of the mailing (mailing-time-based analysis), select the **All groupings by time are based on the start date of the mailing** check box.

If you clear the check box, recipient-specific actions are arranged separately according to when they occurred (time-action-based analysis).

- Mailing "New Year Newsletter" was started on 01/01/2018.
- Mailing "Information Newsletter" was started on 06/02/2018.

© Optimizely 2022

- Time-action-based analysis (check box cleared):

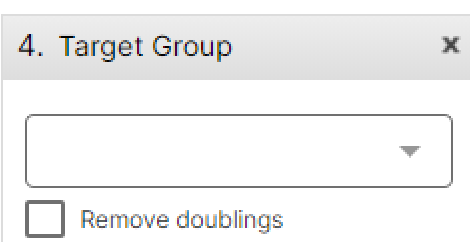
Calendar week	Mailing	Opens (absolute)
01/2018	New Year Newsletter	5
03/2018	New Year Newsletter	5
04/2018	New Year Newsletter	10
06/2018	Information Newsletter	5
08/2018	Information Newsletter	5
09/2018	Information Newsletter	5

- Mailing-time-based analysis (check box selected):

Calendar week	Mailing	Opens (absolute)
01/2018	New Year Newsletter	20
06/2018	Information Newsletter	15

Removing doublings

You can remove double counts from the **Click Profile**, **Link**, and **Target Group** groupings automatically.



For example, a recipient in the target groups *Men* and *Age 30-40 years* is counted twice if you use both target groups in a report. Thus, the sum line contains doublings. To prevent this, select the **Remove doublings** check box in the grouping, so the report shows only one match for an arbitrary (applicable) target group of a recipient.

- The recipient belongs to the target groups "Men" **and** "Age 30-40 years".
- If you clear the **Remove doubling** check box, the following is shown in the report:

	Target Group	Recipients (absolute)
	Men	1
	Age 30-40 years	1
Sum line		2

- If you select the **Remove doubling** check box, the following is shown in the report:

	Target Group	Recipients (absolute)
	Men	1
	Age 30-40 years	0
Sum line		1

Combinations

You can combine multiple groupings to get multidimensional reports. For example, select the groupings **Mailing** and **Target Group** to get a report that shows measures per mailing and for each target group.

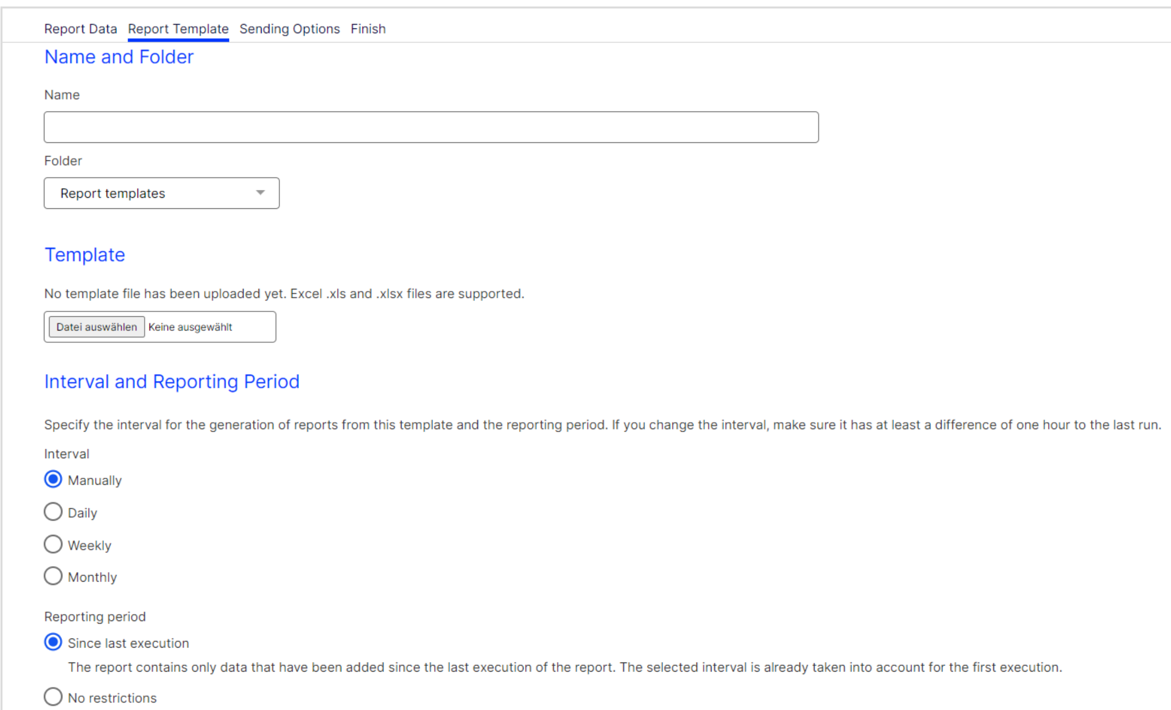
User-defined arrangement

The arrangement of groupings affects the result of the report. You can drag and drop selected groupings to the desired position. If you commute the groupings **Mailing** and **Target Group**, you get an evaluation of target groups and each target group is evaluated according to mailings.

> **Tip: Calculation of rates**

> To calculate rates (as percentages), such as open or click rates, make sure to select a grouping that delivers meaningful report data. For example, to get the open rate (as percentage) of a mailing, the **Mailing** grouping must be selected. In the same way, the open rate by target group can be displayed. However, open rates in a time-based report do not deliver meaningful values.

Step 2. Configuring the report template



To configure the automatic execution and sending of your template, perform the following steps after adding measures and groupings:

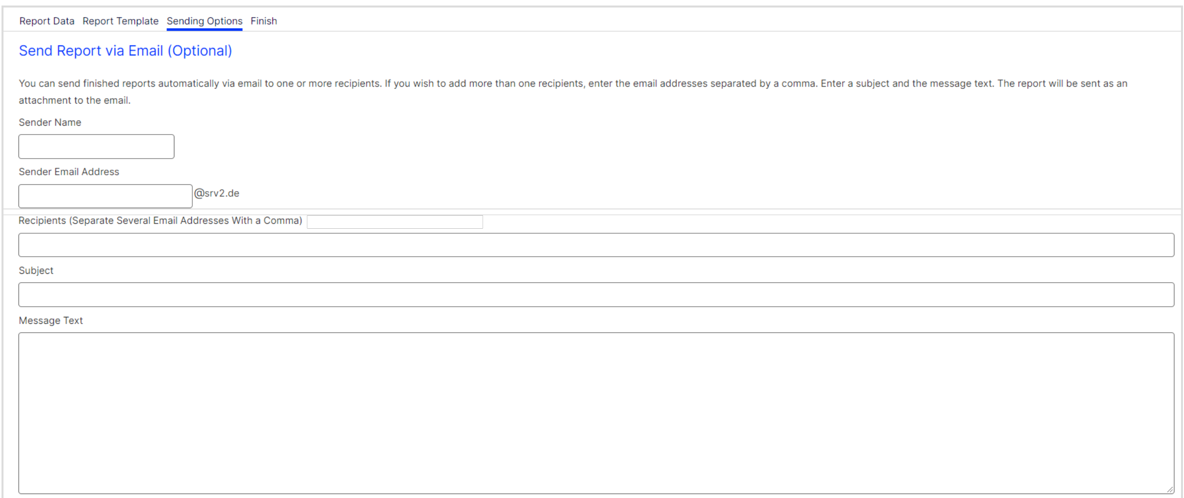
1. In the **Create Report** window, in the **Report Data** tab, click **Save as Report Template**.
2. In the **Name** box, enter the name of the report template.

3. In the **Folder** list, select a folder to which you want to save the report template. To use an Excel template, click **Browse...** and select a template. If no template is uploaded, the Optimizely default template is used.
4. In the **Interval** area, click the interval for the generation of reports from this template. If you change the interval, make sure that the last execution has run at least one hour ago.
   - **Manually**. Reports can only be executed manually.
   - **Weekly**. Select the day of the week and the time of day when the report should be executed.
   - **Monthly**. Select the day of the month and the time of day when the report should be executed.
5. In the **Reporting Period** area, select one of the following options.
   - **Since last execution** to define that the report contains only data added since the last execution of the report. The selected interval is already taken into account for the first execution. If you select the Weekly interval, a reporting period of one week is used for the first execution. If you change the weekly execution interval, such as *from Monday to Wednesday*, the next execution uses the reporting period beginning Wednesday of the previous week.
   - **No restrictions** to define that available data is evaluated each time the report is being executed. By using this option, the amount of data to be evaluated can be very large. The execution of such reports may take some time.
6. Click **Sending Options**.

> **Tip: Reporting Period**
>
> Reporting period lets you specify the time frame from which data used in the analysis is derived. The **No restrictions** option relates only to the previously-defined global report parameters and measured data. If you evaluate openings in a report and define that only mailings started in 2018 should be considered, openings for mailings of the year 2018 are counted. The **Incremental** option evaluates data added since the last execution of the report.

Step 3. Sending the report

> **Tip:** If you do not want to send the reports via email, leave these fields empty.



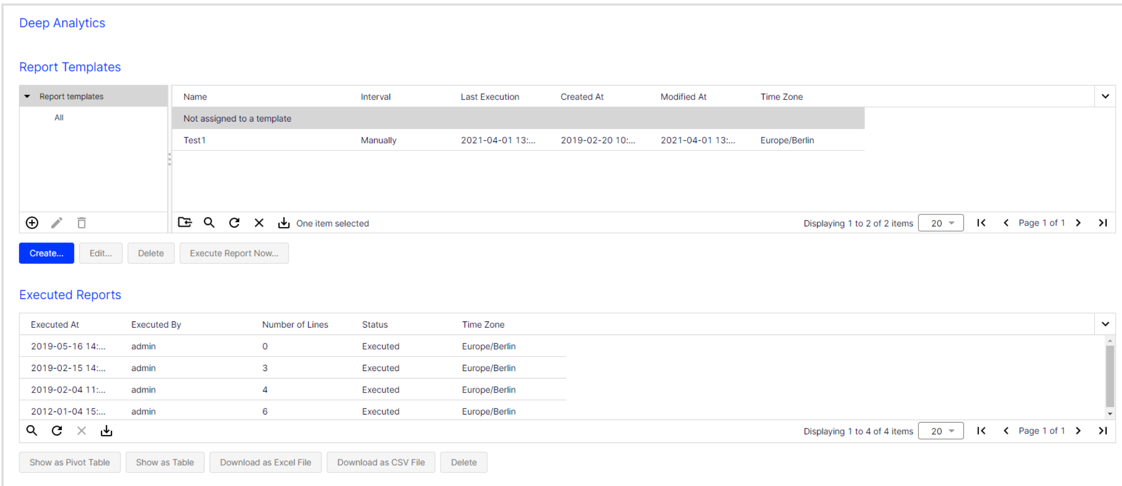
To send the report via email, perform the following steps:

1. In the **Recipients** box, enter the email addresses of the recipients. Separate multiple email addresses with a comma.
2. In the **Subject** box, enter the subject of the email.
3. In the **Message Text** box, enter the message text of the email. Executed reports are attached as Excel files to the emails.
4. Click **Save**.
5. Close the window. The new report template appears in the upper section of the **Deep Analytics** window.

Executing ad hoc report

After performing the step 1 and step 2 to create a report template, you can execute the report without configuring or saving it as a template:

1. In the Deep Analytics overview, click **Execute Report Now...**.



2. To use an Excel template, click **Browse...** and select a template. If you do not upload an Excel file, the default template is used.
3. In the **Reporting Period** area, select one of the following options:
   - **Specify period**. Specify the reporting period, a start date and an end date for the period you want to analyze.
   - **No restrictions**. Define that all available data is analyzed at execution of the report. Note that by using this option the amount of data to be analyzed can be very large in the course of time. The execution of such reports may take some time.
4. Click **Sending Options** and follow the steps under Sending options.
5. Click **Start Execution**. After execution, the report is shown in the overview window and can also be downloaded as an Excel or CSV (comma-separated values) file.

Measures

You can use the following measures for Deep Analytics reports:

Mailings

Measure	Description
Number of mailings	Total number of outgoing mailings

Measure	Description
(absolute)	
Total volume	Number of recipients + Number of responses (total, non-unique) less skipped recipients

Recipients

Measure	Description
Unique recipients	Number of unique recipients. If a recipient receives multiple mailings, the recipient is only counted once.
Recipients (absolute)	Total number of recipients
Recipients minus bounces (absolute)	Total number of recipients whose email addresses did not produce a bounce (message of non-deliverability)
Recipients minus bounces (%)	Percentage of recipients whose email addresses did not produced a bounce (message of non-deliverability)

Opens

Measure	Description
Unique opens (absolute)	Total number of unique opens. Multiple opens by a recipient are seen as one single open.
Opens (absolute)	Total number of opens
Unique open rate (%)	Percentage of unique opens in relation to the number of recipients minus bounces
Open rate (%)	Percentage of total opens in relation to the number of recipients minus bounces

Measure	Description
Unique gross open rate (%)	Percentage of unique opens in relation to the total number of recipients
Gross open rate (%)	Percentage of total opens in relation to the total number of recipients

Clicks

Measure	Description
Unique clicks	Number of unique recipients that clicked an arbitrary link in a mailing. It does not matter how often and which link was clicked.
Clicks (absolute)	Total number of clicks
Click rate (%)	Percentage of total clicks in relation to the number of recipients minus bounces
Unique click rate (%)	Percentage of unique clicks in relation to the number of recipients without bounces
Unique gross click rate (%)	Percentage of unique clicks in relation to the total number of recipients
Gross click rate (%)	Percentage of total clicks in relation to the total number of recipients
Effective unique click rate (%)	Percentage of unique clicks in relation to the unique opens

Responses

Measure	Description
Unique responses	Total number of unique responses

© Optimizely 2022

Measure	Description
(absolute)	
Unique response rate (%)	Percentage of unique responses in relation to the number of recipients minus bounces
Unique autoresponder (absolute)	Total number of unique autoresponder messages
Unique autoresponder rate (%)	Percentage of unique autoresponder messages in relation to the number of recipients minus bounces
Unique replies (absolute)	Total number of unique replies
Unique reply rate (%)	Percentage of unique replies in relation to the number of recipients minus bounces
Unique bounces (absolute)	Total number of unique bounces
Unique bounce rate (%)	Percentage of unique bounces in relation to the number of recipients
Unique hard bounces (absolute)	Total number of unique hard bounces
Unique hard bounce rate (%)	Percentage of unique hard bounces in relation to the total number of bounces
Unique soft bounces (absolute)	Total number of unique soft bounces
Unique soft bounce rate (%)	Percentage of unique soft bounces in relation to the total number of bounces

Unsubscribes

Measure	Description
Unique unsubscribes (absolute)	Number of unique clicks on the unsubscribe link
Unique unsubscribe rate (%)	Percentage of unique clicks on the unsubscribe link in relation to the number of recipients minus bounces
Unique net unsubscribe rate (%)	Percentage of unique clicks on the unsubscribe link in relation to the total number of recipients

Post-click

These measures are available only if post-click tracking is configured for your client. If you select the **Post-click...** measure, a new window opens where you can define the measure. To do this, perform the following steps:

1. Enter a **name**.
2. Select a **service**. (If you use only one service, it is already selected.)
3. Select whether the measure you want to create is a number (**count**), a **sum** or an **average**.
   - If you select **Sum** or **Average**, select a post-click value from the drop-down list. If you do not want to filter this value further, save the definition.
   - If you select **Count**, no filters are added.
4. To add filters, in the **Filter** area, click **Add** and select an operator. The operators depend on whether the selected post click represents a number or a string value.
5. Enter a reference value to compare the post-click value with. This comparison is executed according to the operator selected in the previous step.
6. Click **Submit** .
7. To add more filter values, click **Add** and repeat the previous steps.
8. Click **Save**. The newly created post-click measure appears in the **New Report** window in the **Report Data** tab.

Tip: Entering multiple values

If you select **is one of the following values**, you can enter multiple values in one text box; for example, if you want to copy values from a CSV file:

1. Select the operator **is one of the following values** and enter the values, for example, comma-separated.
2. Open the drop-down list, click the scissors symbol (**Separate multiple values**) and in the box, enter the used delimiter symbol.
3. Click **Submit** ☑. The entered values are now handled as single values.

Groupings

You can use the following groupings for Deep Analytics reports:

Grouping	Description
Date or Time	Select one of the following groupings: • Year • Calendar Week • Month • Date • Hour of the Day • Week Since Day of the Week • Day of the Week • Day of the Month
Domain	Recipient domain
Recipient List	Select one of the following groupings: • Recipient List Name • Recipient List ID
Recipient List	Various fields in recipient lists

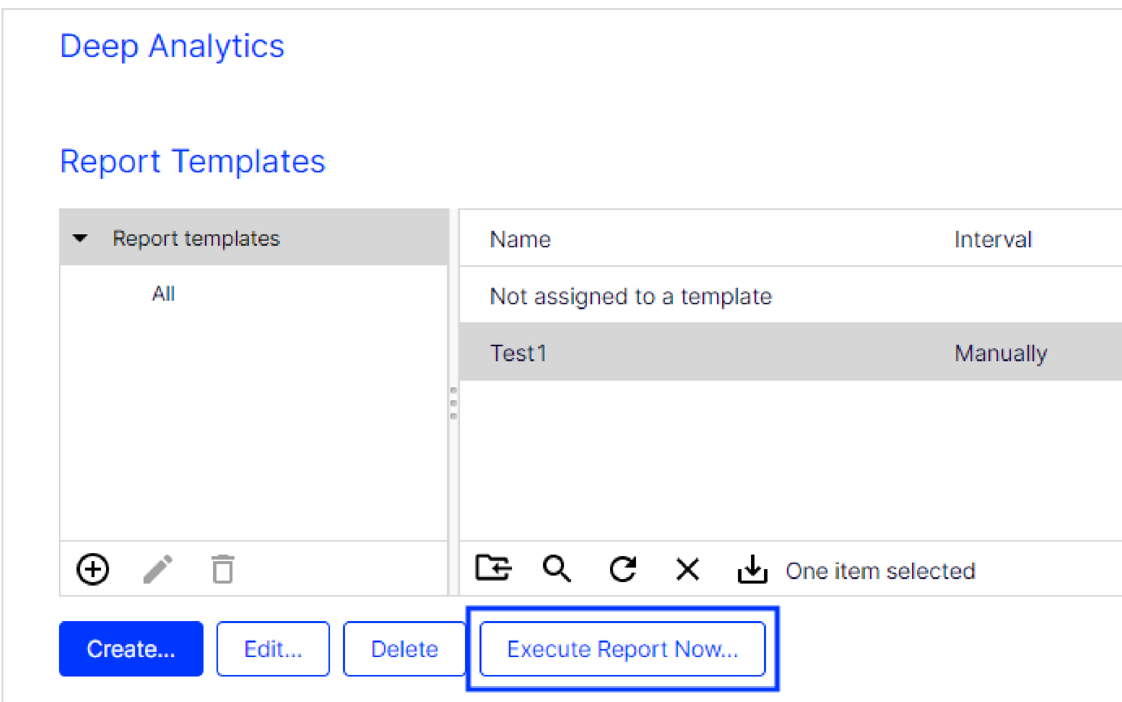
Grouping	Description
Field	
Click Profile	Used click profiles
Link	Links used in the mailing
Link Type	Select one of the following link types used in the mailing: • Link • Double opt-in link • Online version link • Send-to-a-friend link • SWYN link
Mailing	Select one of the following groupings: • Mailing Name • Mailing ID
Client	Name or ID of the clients you are allowed to access. Select one of the following groupings: • Client Name • Client ID
Folder	Folders in which you store mailings
Subject	Subject lines used in mailings **Tip:** Only the standard subject line is considered. Additional target group-controlled subject lines are ignored.
Target Group	Recipients who belong to specific target groups
Browser, OS,	Select one of the following groupings:

Grouping	Description
Device	- Device Type - Camera - Car multimedia - Video game console - Desktop computer - Feature phone - Phablet - Portable media player - Smart display - Smartphone - Tablet - Smart TV - Wearable - Peripheral - Browser - Android Browser - Chrome - Firefox - Internet Explorer / Edge - Microsoft Outlook - Opera - Outlook Express - Safari - Thunderbird - Operating System - Android - BlackBerry - GNU/Linux - iOS - Mac - Symbian - Unix - Windows

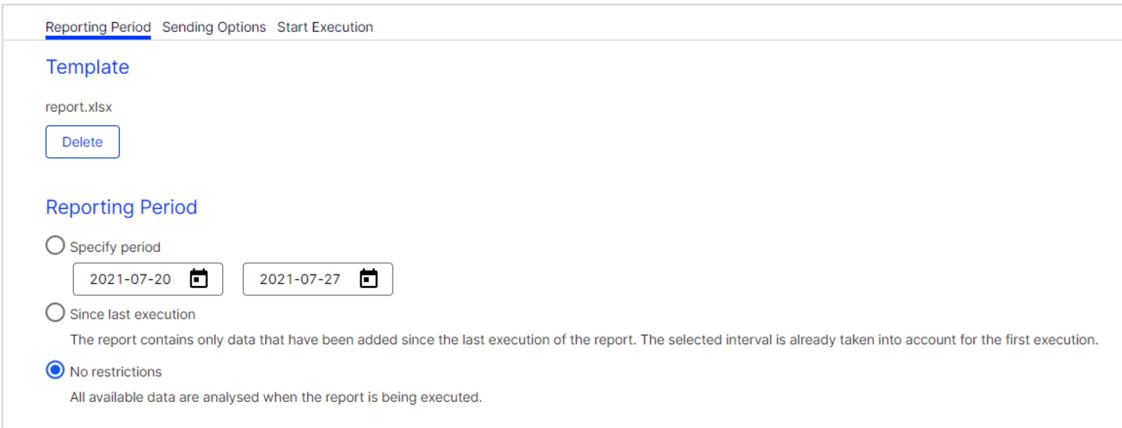
Grouping	Description
	◦ Windows Mobile • Operating System Version
Media Type	Media type (marketing channel)
Contact Frequency	Number of messages received by a recipient within a reporting period

Executing reports

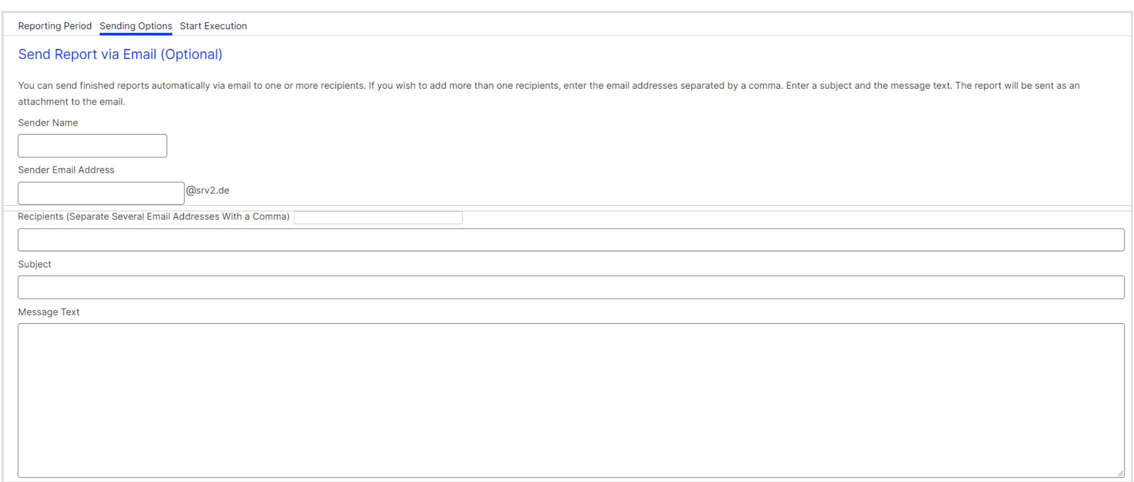
1. In the **Report Templates** area, click a report template on which the new report will be based.
2. Click **Execute Report Now...**.



3. To use an Excel template, click **Browse...** and select a template. If you select nothing here, the Optimizely Campaign default template is used.

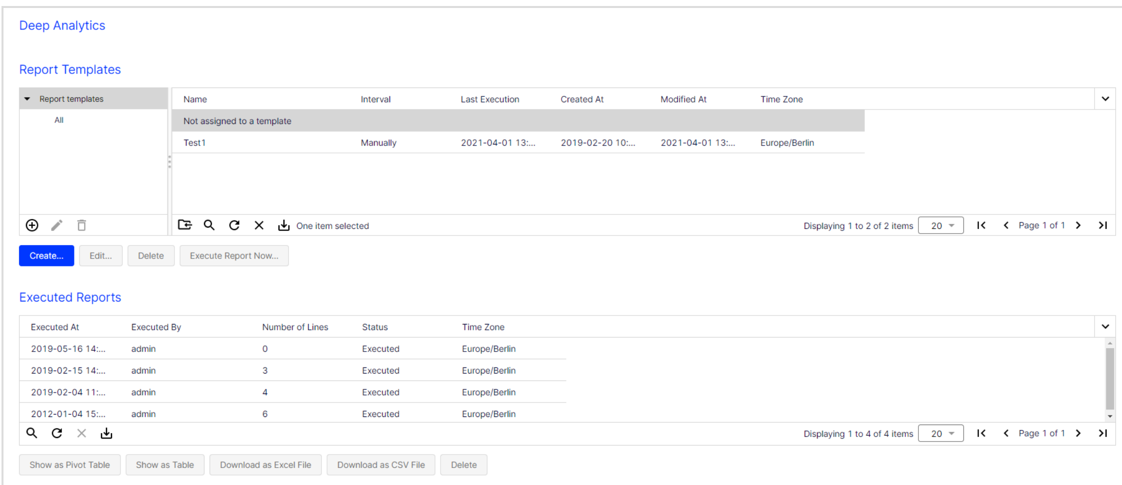


4. In the **Reporting Period** area, select an option:
   - **Specify Period**. Specify the reporting period for which data will be evaluated.
   - **Since last execution**. Data added since the last execution of the report. The selected interval is already considered for the first execution. If the report is executed weekly, a reporting period of one week is used for the first execution. If you change the weekly execution interval, such as *from Monday* to *Wednesday*, the next execution uses the reporting period beginning Wednesday of the previous week.
   - **No restrictions**. All available data. The amount of data can be very large and its execution may take some time.
5. Click **Sending Options**.



6. If you want to send the report via email:
   a. In the **Recipients** box, enter the email address of recipients (separate email addresses with a comma).
   b. In the **Subject** box, enter the email subject.
   c. In the **Message Text** box, enter the email message text.
7. Click **Start Execution**. When the report is executed, you can select it under **Executed Reports**.

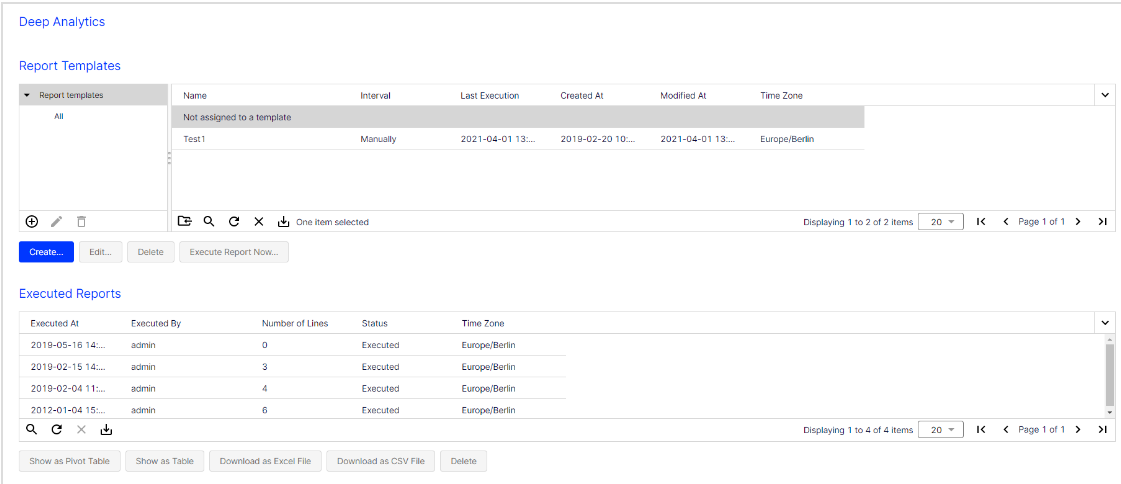
   Use the buttons below the list to display the report as a Pivot table or download it as Excel or CSV file. See also Displaying and downloading a Deep Analytics report.



Displaying and downloading reports

1. In the **Report Templates** area, select a report template. The area **Executed Reports** displays reports that have been executed from the selected template.

   To display a report that is not executed from a template, click **Not assigned to a template** in the **Report Templates** area.



2. In the **Executed Reports** area:
   - To display the report as a pivot table, click **Show as Pivot Table**. See Aggregating data with pivot tables.
   - To display the report in a standard HTML table without formatting, select a report and click **Show as Table**.
   - To download the report as a chart using Microsoft Excel, click **Download as Excel File**.

     > **Tip:** The Excel format provides many possible ways of reporting and displaying data. You may use your own Excel template or the Optimizely default template to create analyses and display data in charts or pivot tables. To learn more, see Data evaluation using Microsoft Excel.

   - To download the report in a CSV (comma-separated values) file, click **Download as CSV File**. See also: **Opening CSV files in Microsoft Excel**.

Opening CSV files in Microsoft Excel

Optimizely Campaign creates CSV (comma-separated values) files in UTF-8 without BOM. Microsoft Excel incorrectly interprets the format as ISO-88591. To correctly open CSV files in Excel, perform the following steps:

1. Open a blank Excel workbook.
2. In the **Data** tab, click **Get Data** > **From File** > **From Text/CSV**.
3. Select the file to open and click **Import**.
4. In the **File origin** area, select **65001: Unicode (UTF-8)** and **Semicolon** in the **Delimiters** area.
5. Click **Load**.

Evaluating data with Microsoft Excel

The Excel format allows rich formatting, calculations, and output in pivot tables and in a chart.

To use your own Excel template, download the default template, customize it then upload it. This Excel template contains the report data in the first worksheet grouped by the selected groupings. The second worksheet contains a copy of the data without sum fields. Use this worksheet to reference data you want to display in other tables or charts (for example, pivot tables).

In general, the following standards apply when formatting the Excel templates:

- **Supported file formats**. Optimizely Campaign supports the Excel '97 format (file suffix .xls) and Excel 2007 (file suffix .xlsx). However, Optimizely does not guarantee support of functions and formatting of these two formats.
- **Data export and data format**. Exported data is exported into the first table with sum fields and second worksheet table without sum fields. Do not change these worksheets; otherwise, the correct export of the data fails. The format of the header page is completely adopted, but not the content. The data formats of the first data row (row 2 in the Excel worksheet) are adopted. Thus, values can be formatted and the formatting can be changed.
- **Evaluations**. You can perform evaluations on the second and subsequent worksheets. Because an unlimited number of rows may be added when executing the report, chart data, pivot tables and formulas must be designed for a very large number of data rows. This especially applies to reports without time restriction.
- **Pivot tables**. Automatic updates must be turned on startup. You find this option under **PivotTable Options** > **Data** > **Refresh data when opening the file**.

> **Tip:** Upon request, Optimizely creates Excel templates with pivot tables, charts and using the layout of your choice. Contact customer support.

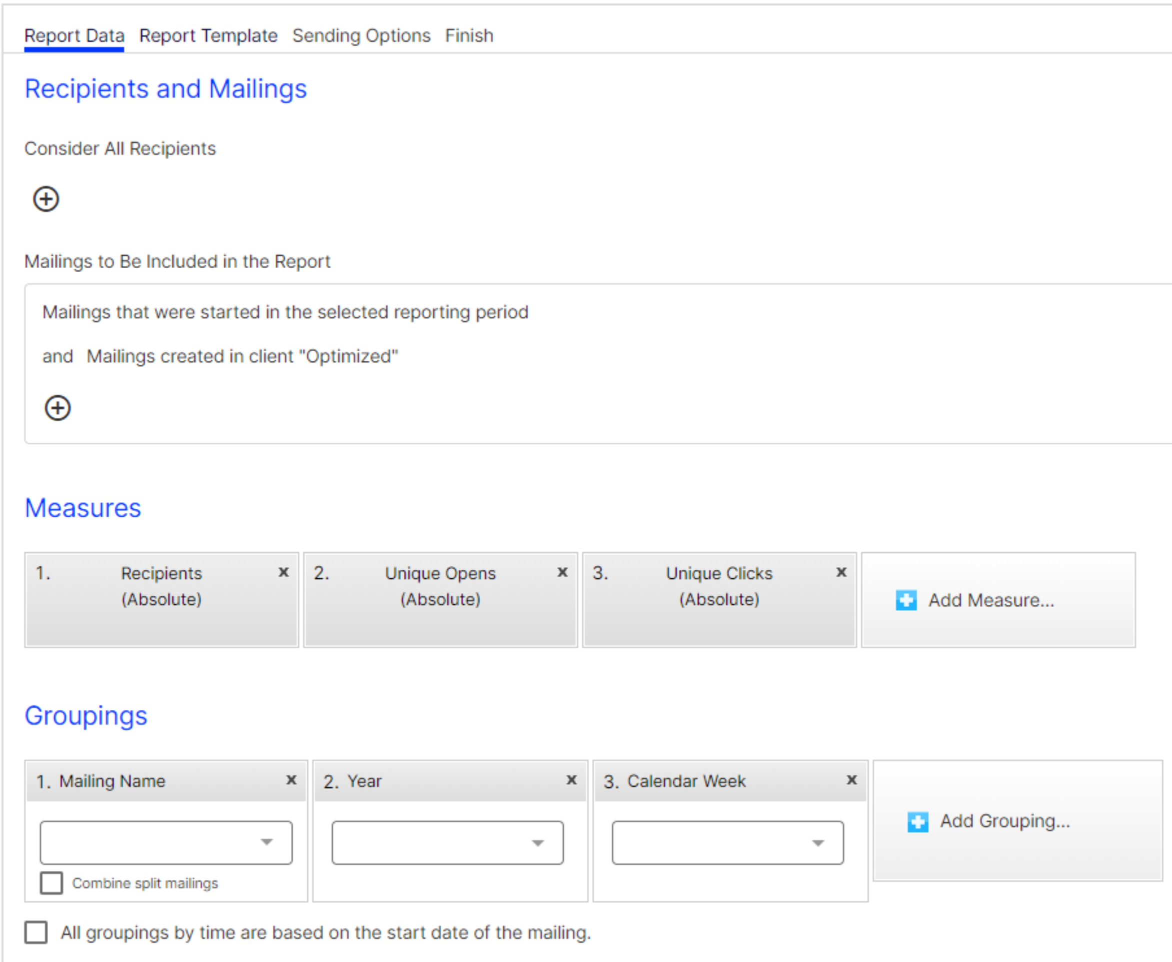
Aggregating data with pivot tables

To organize and display large amounts of data created with Deep Analytics, use pivot tables in the online view and the downloadable Excel templates. Pivot tables can show what is important without losing details. In a pivot table, you can change the orientation and grouping of the data, and the hierarchical order of groups and categories. You can use one pivot table to display different kinds of scenarios.

Raw data is stored in the background. If you group data or omit categories in the table or chart display, no data is eliminated, and you can return to display data at any time.

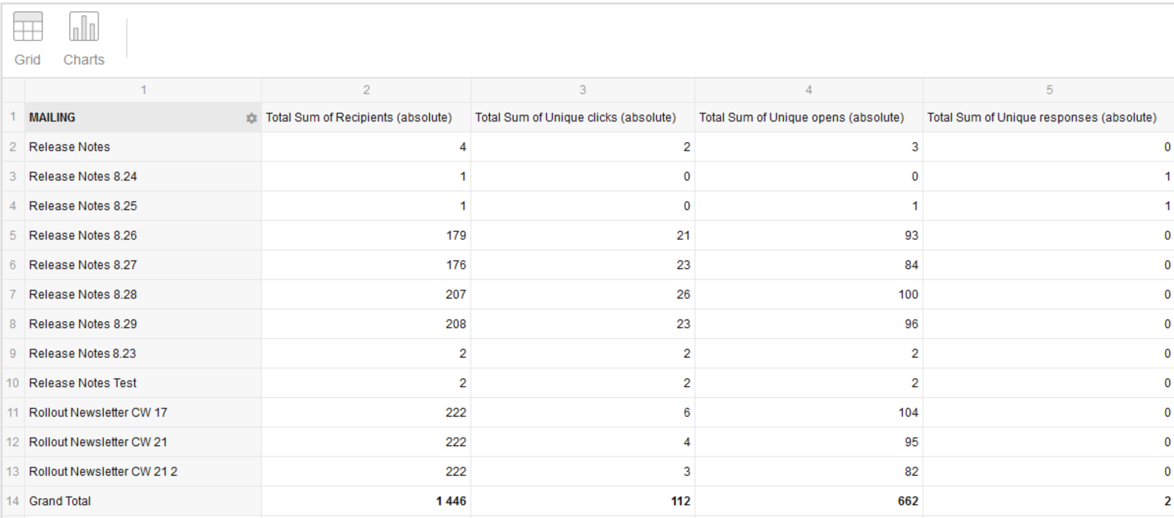
Example 1: Analysis by mailing

Prerequisites: To create the following example pivot tables, you need a Deep Analytics report that contains the measures and groupings as shown on the image. For more information on how to create reports, see Creating a report template.



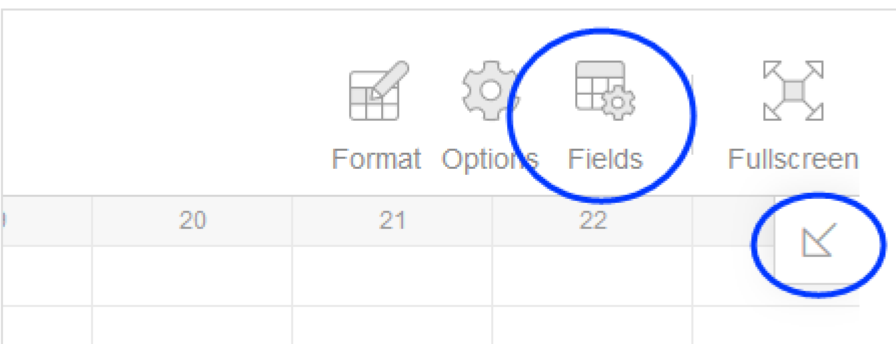
The following examples demonstrate how to use pivot tables for an exact analysis of desired data and details, using different criteria in the same report. By grouping, sorting and omitting data, you can capture reports at a glance. You do not lose any data, though. If you need to show more details, unfold the table and re-order groups and categories.

The following image shows an analysis of recipients, clicks, opens, and responses by mailing.

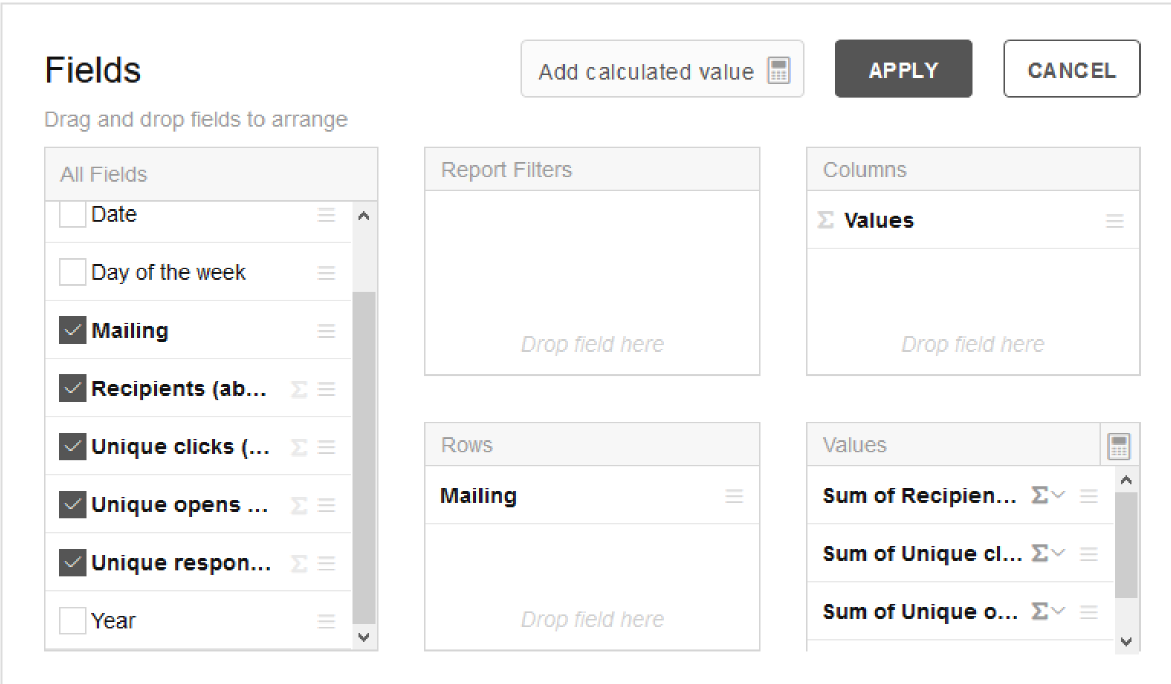


	1	2	3	4	5
1	MAILING	Total Sum of Recipients (absolute)	Total Sum of Unique clicks (absolute)	Total Sum of Unique opens (absolute)	Total Sum of Unique responses (absolute)
2	Release Notes	4	2	3	0
3	Release Notes 8.24	1	0	0	1
4	Release Notes 8.25	1	0	1	1
5	Release Notes 8.26	179	21	93	0
6	Release Notes 8.27	176	23	84	0
7	Release Notes 8.28	207	26	100	0
8	Release Notes 8.29	208	23	96	0
9	Release Notes 8.23	2	2	2	0
10	Release Notes Test	2	2	2	0
11	Rollout Newsletter CW 17	222	6	104	0
12	Rollout Newsletter CW 21	222	4	95	0
13	Rollout Newsletter CW 21 2	222	3	82	0
14	Grand Total	**1 446**	**112**	**662**	**2**

To change or rearrange the pivot table, click **Fields** or the arrow icon pointing to the bottom left.

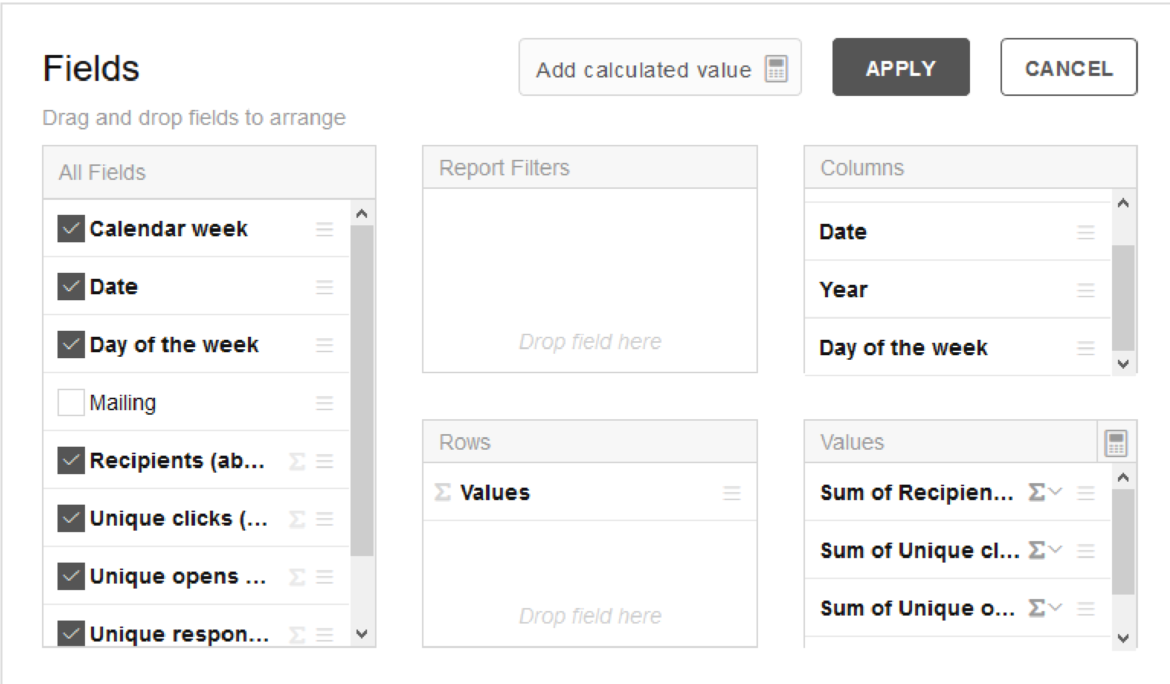


In the left **Fields** area, select the fields you want to use for the evaluation. You can drag and drop each field into one of the four areas. For the above example, click the measures **Recipients**, **Unique clicks**, **Unique opens** and **Unique responses** to add them as values to the **Columns** area.

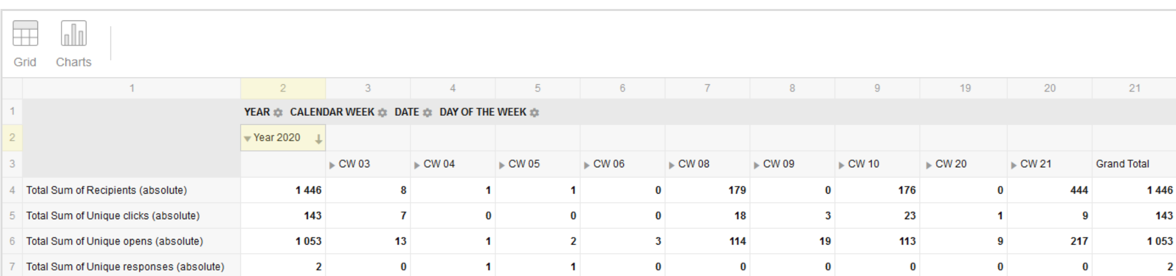


Example 2: Analysis by time

To create a time-based analysis, deselect the **Mailing** grouping under **Fields** and drag the relevant time dimensions into the **Columns** field. Drag the **Values** into the **Rows** field.

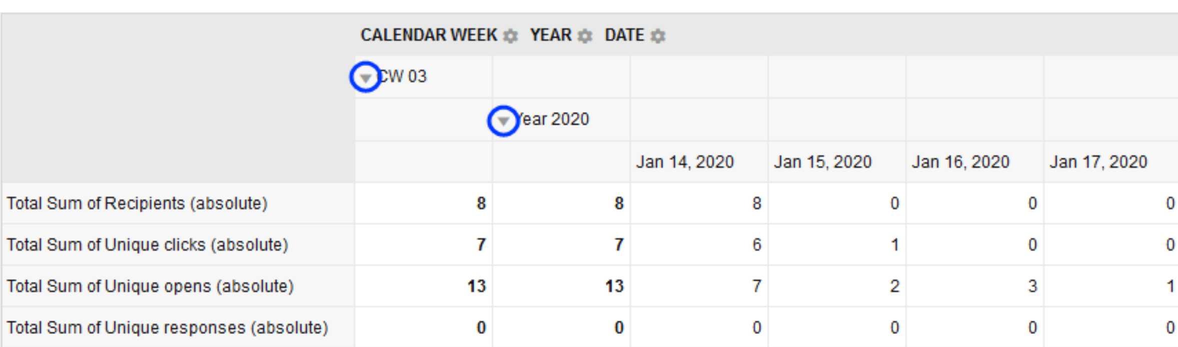


Click **Apply**, to create a new analysis:



	Year 2020	CW 03	CW 04	CW 05	CW 06	CW 08	CW 09	CW 10	CW 20	CW 21	Grand Total
Total Sum of Recipients (absolute)	1 446	8	1	1	0	179	0	176	0	444	1 446
Total Sum of Unique clicks (absolute)	143	7	0	0	0	18	3	23	1	9	143
Total Sum of Unique opens (absolute)	1 053	13	1	2	3	114	19	113	9	217	1 053
Total Sum of Unique responses (absolute)	2	0	1	1	0	0	0	0	0	0	2

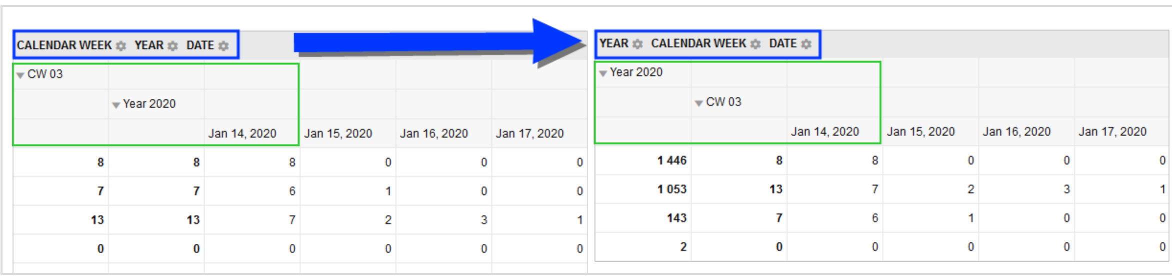
Click the left arrow next to a field name to display the dimension organized below.



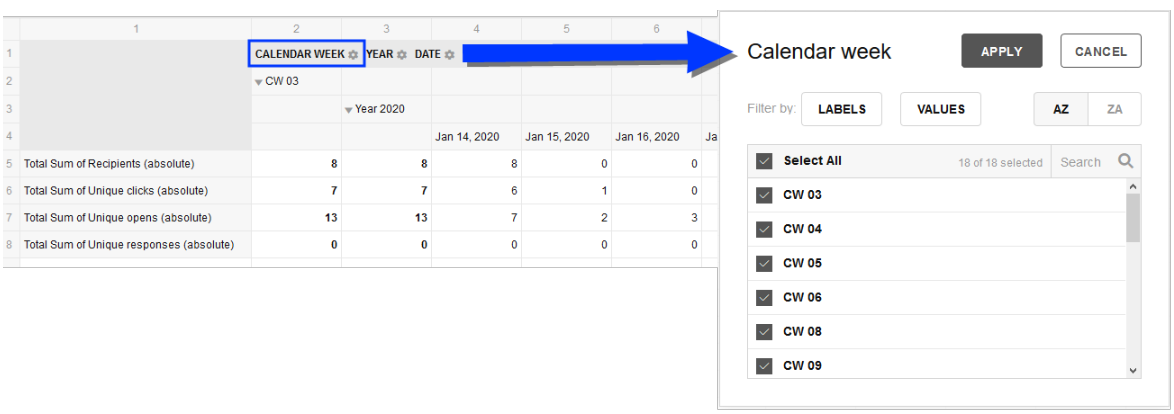
	CW 03	Year 2020	Jan 14, 2020	Jan 15, 2020	Jan 16, 2020	Jan 17, 2020
Total Sum of Recipients (absolute)	8	8	8	0	0	0
Total Sum of Unique clicks (absolute)	7	7	6	1	0	0
Total Sum of Unique opens (absolute)	13	13	7	2	3	1
Total Sum of Unique responses (absolute)	0	0	0	0	0	0

To change the hierarchy of these drop-down dimensions, drag one of the bold field filters in the upper area before or after other filters.

The example below shows **Calendar week** > **Year** > **Date**. By dragging the **Year** field filter to the far left, the year value will become top of the drop-down dimension hierarchy (green box).

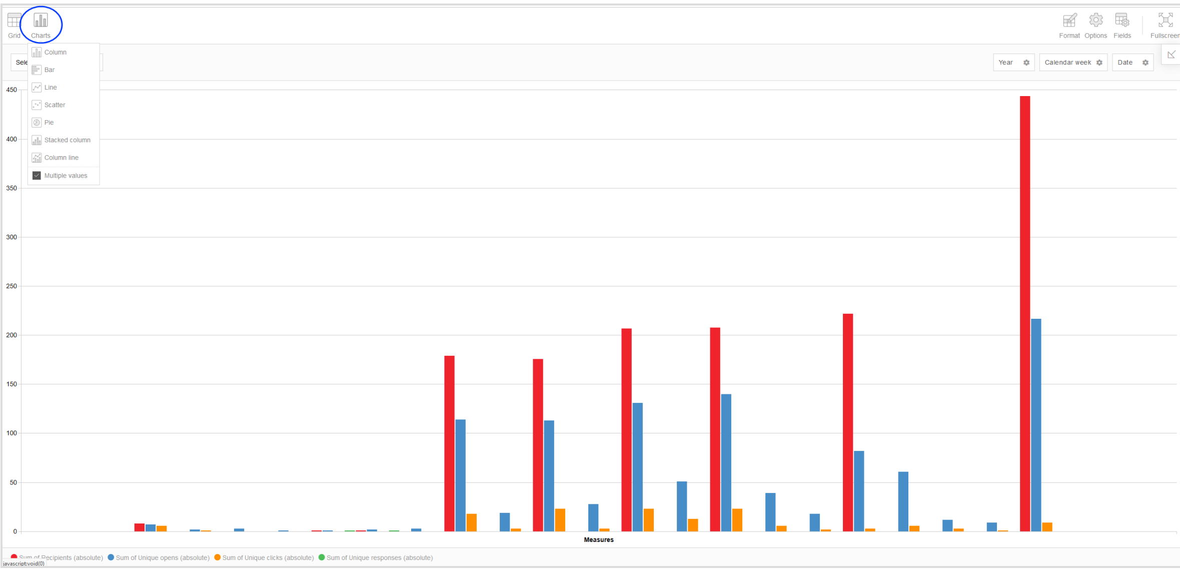


Click the bold field filters to select and deselect fields or refine filters.



In the dialog box, click **Filter by: Labels** to specify conditions that are related to names. Example: *Labels Contain newsletter* filters field values with "newsletter" as part of their name. Click **Filter by: Values** to filter for numeric values. Example: *Sum of Recipients Top 10* filters the 10 highest recipients field values. Click **Apply** to accept the changes.

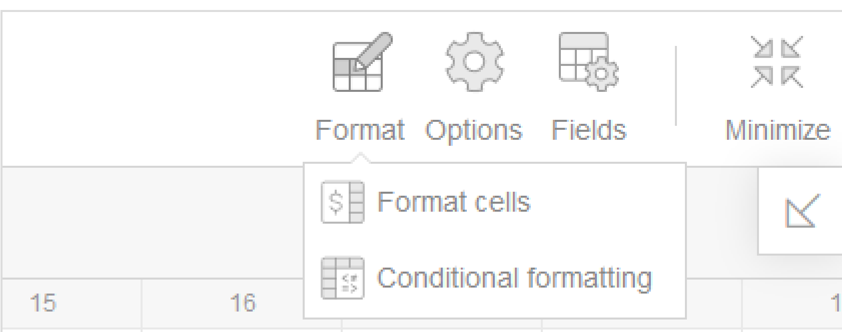
To display your pivot table as a chart, click **Charts** in the menu in the upper left corner and select a suitable chart. Select the **Multiple values** checkbox to display multiple field values in one table. Use the **Select Measures** button to add or deselect individual measures.



Click **Grid** to return to the grid view of the pivot table.

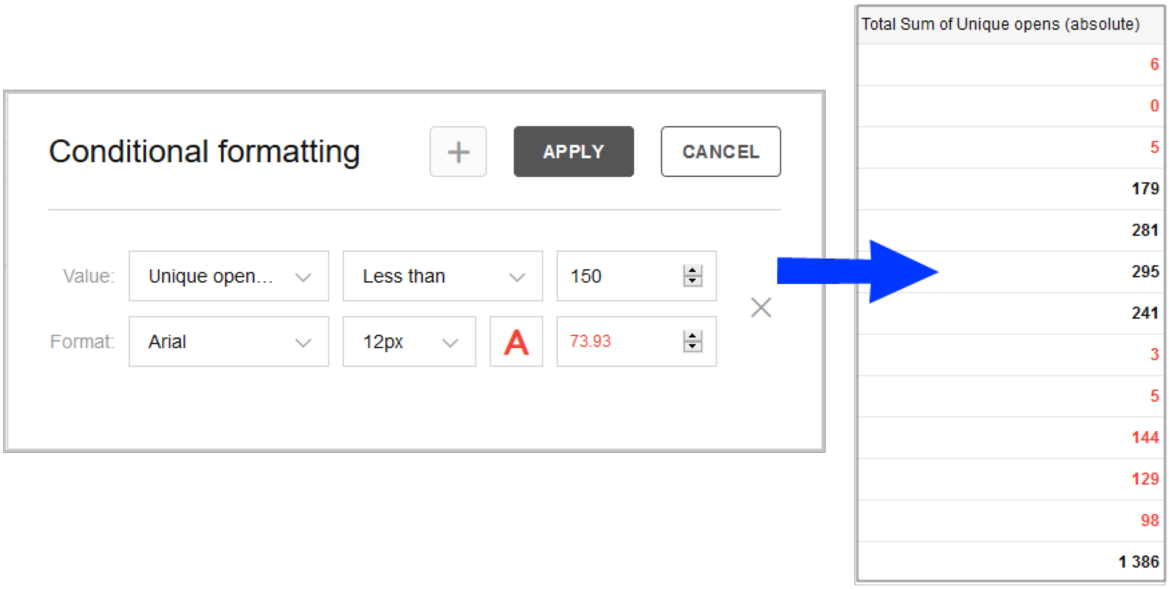
Further Menu options

Under **Format** in the top right menu, you can specify the formatting of individual cells or create conditional formatting.



Click **Format** > **Format cells** to adjust the cell properties of all or some field values. You can, for example, add a currency symbol to some values of the table.

To add conditional formatting, select **Format** > **Conditional formatting**. Conditional formatting lets you, for example, configure that numbers below 150 are displayed in red.



Click **Options** in the upper right menu to change individual layout properties.

Live Analytics

Live Analytics lets you create RFM analyses in real time from the entire recipient dataset, or a subset of recipients. Live Analytics stores recipient action data from mailing lists then analyzes that data from the previous 12 months. The data is updated daily.

Live Analytics ensures high performance for the analysis of large quantities of data. Running analyses show an up-to-date image of the customer lifecycle, preferences, sales volume, and recipients' purchases.

RFM analysis

RFM analysis is an effective procedure for the analysis, prediction, and optimization of the customer base. RFM stands for the following three parameters, indicators of the probability that a customer will react to a marketing campaign in the future:

- **Recency**. When a customer's most recent action was made, including purchases, aborted orders, or a product view.
- **Frequency**. The frequency with which a customer performed the above actions.
- **Monetary**. The sales volume a customer generated; only the purchase action is analyzed.

You can increase profitability and ROI (return on invest) of your campaigns with the combination of these three parameters. Each recipient is assigned to an RFM segment. You can view the entire recipient base as well as individual segments, further constrain them, and define them as a target group for a campaign.

Live Analytics packages

You can run up to three Live Analytics analyses simultaneously using the standard package. If you need more analyses, contact customer support to expand it.

To start Live Analytics, open the Optimizely Campaign menu and select **Analytics** > **Live Analytics**. The **Live Analytics** window shows running analyses in the selected display (pie, line or bar chart).

You can arrange analyses in the desired order using drag and drop. To do this:

1. Move the pointer over an analysis in the blue bars on the upper edge until the pointer switches to the drag and drop symbol .
2. Drag the analysis to the desired position.

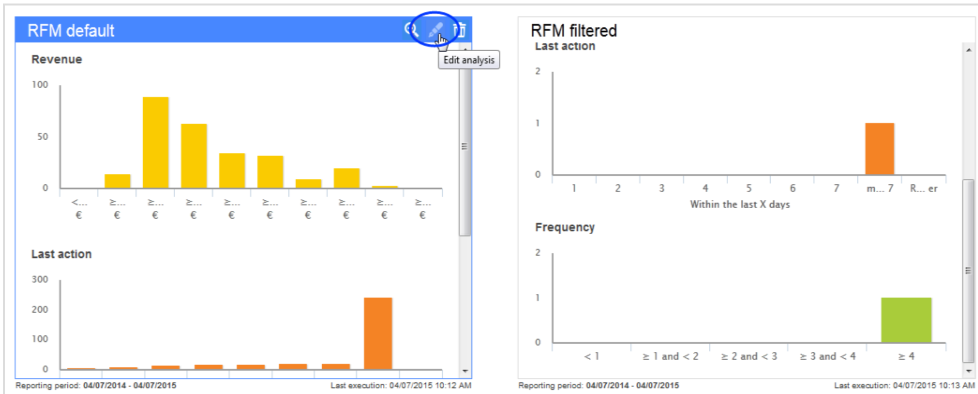
Then, perform the following actions:

- **Create**. See Create and edit Live Analytics analysis.
- **Detail view**. Move the pointer over the analysis and click **Show details** . See Live Analytics detail view.
- **Edit**. Move the pointer over the analysis and click **Edit Analysis** . See Create and edit Live Analytics analysis.
- **Delete**. Move the pointer over the analysis, click **Delete Analysis** then **Delete**.

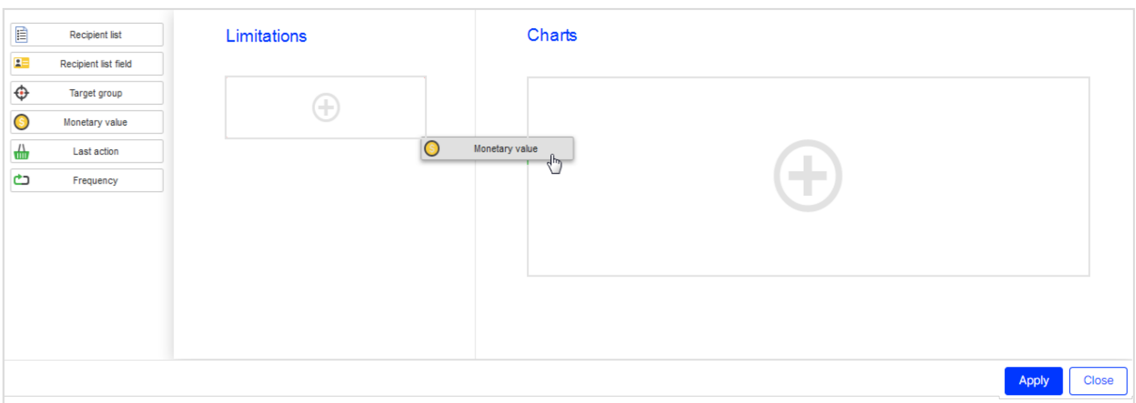
Creating a Live Analytics analyses

1. To create a new analysis, in the **Live Analytics**, window click **Add** . The **Create Analysis** window opens.

> **Note:** To edit an already existing analysis in the Live Analytics window, move the pointer over the desired analysis and click **Edit analysis** . The **Edit Analysis** window opens.



2. Drag the desired Live Analytics analysis items from the left action area to the **Limitations** (to perform a pre-selection of the analyzed recipients) and **Charts** areas.



3. To edit an analysis item, move the pointer over the desired item in the **Limitations** or **Charts** area and click **Edit Chart...** .
4. To change the chart type of an analysis item, move the pointer over the desired item in the **Charts** area and click the desired chart symbol for pie, line, or bar charts.
   - **Pie Chart** . Each piece of the pie represents one recipient segment for a period, frequency, or sales volume. Click a piece to constrain the selection to this segment.

- **Line Chart** . Each point of the line represents one recipient segment for a period, frequency or sales volume. Click a point to constrain the selection to this segment.
- **Bar Chart** . Each bar represents one recipient segment for a period, frequency or sales volume. Click a bar to constrain the selection to this segment.

5. Configure the analysis items as described in Analysis items.
6. To remove an analysis item, move the pointer over the item and click **Delete Chart** .
7. You can arrange the analysis items in the desired order, both under **Limitations** and **Charts**. To move an item, move the pointer over the item. The pointer switches to the **Move** symbol . Click and drag the item to the desired position.
8. Click **Apply**.
9. In the **Name** field, enter a name for the analysis and click **Apply**. The analysis is shown in the overview. If no analysis data is available, a notification appear. When the computation of the analysis data is concluded, the charts and data are displayed.

Note: Limitations

- An analysis must include at least one chart.
- An analysis can include multiple charts.
- Invalid parameters or missing configurations are displayed when you add an analysis item as a constraint or chart.

Analyzing analysis items

Analysis items form dimensions that you can use as a limitation or chart in an analysis. Restrictions apply to the use of analysis items as a limitation.

The following table shows analysis items and their options. Click an analysis item to read about its use and configuration.

Analysis item	Description	Constraint	Chart
Recipient list	Constrains recipients to one or more recipient lists or analyzes recipients sorted according to recipient lists.	✓	✓
Recipient list field	Constrains recipients to a recipient list with a specific value or analyzes recipients sorted according to the values of a recipient list field.	✓	✓
Target group	Constrains recipients to one or more target groups or analyzes recipients sorted according to target groups. **Note:** Target groups must have been created in the Target groups function.	✓	✓
Monetary value	Analyzes recipients sorted according to sales figures within the past 12 months.	✗	✓
Last action	Analyzes recipients sorted according to the time period of their last action (purchase, product view, abandoned shopping cart) within the last 12 months.	✗	✓
Frequency	Analyzes recipients sorted according to the frequency of an action (purchase, product view, abandoned shopping cart) within the last 12 months.	✗	✓

Limitations

A **limitation** limits the data to be analyzed with the aid of an analysis item. You can add or remove limitations in running analyses. You can also create analyses without limitations.

To use an analysis item, drag it from the left action area to the **Limitations** and **Charts** areas. You can make limitations in the analysis by using to the following analysis items:

- **Recipient Lists**. Select recipient lists to include in the analysis.
- **Recipient List Fields**. Select a recipient list field and a value range to include only recipients with these attributes in the analysis.
- **Target Groups**. Select target groups to include in the analysis.

> **Tip:** If you make no limitations, all active recipients of your client are considered for the analysis. You can deactivate selected limitations later in the detail view of an analysis.

Chart

In a **chart**, the value range of an analysis item is displayed segmented, according to the selected dimension. The segment can be carried out according to time, frequency, sales volume, grouping or defined values.

> **Tip:** For items that use charts: you can change the chart type at any time, even in running analyses.

Recipient list

Limitation

1. Drag the analysis item from the left action area to the **Limitations** area.
2. Enter an optional name for the limitation. If you are using multiple analysis items of the same type, names help you differentiate them.
3. In the list, select the desired recipient lists.
4. Click **Close**.

© Optimizely 2022

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter an optional name for the chart. If you are using multiple analysis items of the same type, names help you differentiate them.
3. In the list, select the recipient lists. If you enter multiple recipient lists, you receive a segmented evaluation in the chart.
4. Click **Close**.
5. Move the pointer over the added analysis item and click the desired chart symbol: .

Recipient list field

Limitation

1. Drag the analysis item from the left action area to the **Limitations** area.
2. Enter an optional name for the limitation. If you are using multiple analysis items of the same type, names help you differentiate them.
3. In the list, select the desired recipient list field (for example, *country*, *age*, *modified*). Depending on the file type, you can configure discrete values, value ranges, or intervals:
   - **Text Fields**. Enter a value to use as the filter for the selected recipient list field, such as `France`.
     - You must enter the value *exactly* as specified in the recipient list (including capitalization).
     - To filter the recipient list field by up to 10 filters, click **Add** and enter another value. Repeat for values that you want to use as filters.
   - **Numeric Fields**. In the list, select whether you want to display a multiple selection, an interval, or a threshold value.
     - If you selected **Multiple values can be selected**, proceed as described in **Text fields**.

  - If you selected **Interval** or **Threshold** option, in the **Unit** field, enter a unit (for example, *years*) and a lower or upper limit in the following fields.
  - If you define a threshold value, also select whether you want to filter values above or below the threshold value.
- **Date Fields**. In the list, select a date field (such as *modified*) by which you want to segment the evaluation. Select the time interval later, in the detail view of the analysis.

4. Click **Close**.

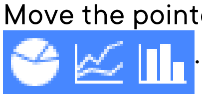
Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter an optional name for the chart. If you are using multiple analysis items of the same type, names help you differentiate them.
3. In the list, select the desired recipient list field for example, *country*, *age*, *modified*. Depending on the file type, you can configure discrete values, value ranges or intervals:
   - **Text Fields**. In the box below, enter a value to use as the filter for the selected recipient list field, such as `France`.
     - Enter the value *exactly* as specified in the recipient list (including capitalization).
     - To filter the selected recipient list field by up to 10 filters, click **Add** and enter another value. Repeat this step for values that you want to use as filters.
     - If you enter multiple values here, you receive a segmented evaluation in the chart.
   - **Numeric Fields.** Define the value ranges (intervals) that you want to display in the chart, starting with the smallest segment. In the box after **Values lesser than or equal to**, enter a numerical value, such as `10`. Then, click **Add** and add the next higher value range, such as `20`, `50`, `100`. Repeat until you define all value ranges.
     - You can define up to 10 values ranges per chart.
     - If you enter multiple value ranges here, you receive a segmented evaluation in the chart.
   - **Date Fields**. In the **Reporting Period** list, select an evaluation period for the data: *within the last 7 days*, *8 weeks*, *12 months*, or *10 years*. You can also display values outside the selected evaluation period by checking the **Show values beyond the**

reporting period box. In the chart, an additional segment for previous events and an additional segment for recipients without a corresponding event (*Remainders*) are displayed.

Example: If you selected the reporting period **the last 12 months** for the recipient list field **Last changed**, with activated **Show values beyond the reporting period** option, 14 segments are displayed in the diagram.

   - one each for the last 12 months
   - another for recipients whose datasets last changed more than 12 months ago
   - one for recipients whose datasets have not changed since being created.

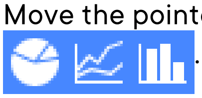
4. Click **Close**.
5. Move the pointer over the added analysis item and click the desired chart symbol: .

 *Target group*

Limitation

1. Drag the analysis item from the left action area to the **Limitations** area.
2. Enter an optional name for the limitation. If you are using multiple analysis items of the same type, names help you differentiate them.
3. In the list, select the desired target groups.
4. Click **Close**.

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter an optional name for the chart. If you are using multiple analysis items of the same type, names help you differentiate them.
3. In the list, select the desired target groups. If you enter multiple target groups, you receive a segmented evaluation in the chart.
4. Click **Close**.
5. Move the pointer over the added analysis item and click the desired chart symbol: .

Monetary value

> **Note:** You cannot use this item as a limitation.

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter an optional name for the chart. If you are using multiple analysis items of the same type, names help you differentiate them.
3. If you are using multiple post-click services, select a post-click service in the list below it. If you are only using one post-click service, this list is not displayed.
4. In the **Revenue Field** list, select the post-click value that tracks sales. The name of this value can be different depending on the post-click service and configuration, such as *revenue*, *sales*, and so on.
5. Define the value ranges (intervals) that you want to display in the chart, starting with the smallest value. In the box after **Values less than or equal to**, enter a numerical value, such as 10. Then click **Add** and add the next higher value range, such as `20`, `50`, `100`. Repeat this step until you define the desired value ranges.

© Optimizely 2022

- You can define up to 10 values ranges per chart.
- If you enter multiple value ranges, you receive a segmented evaluation in the chart.

6. Click **Close**.
7. Move the pointer over the added analysis item and click the desired chart symbol: .

Last action

> **Note:** You cannot use this item as a limitation.

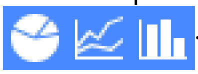
Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter an optional name for the chart. If you are using multiple analysis items of the same type, names help you differentiate them.
3. If you are using multiple post-click services, in the drop-down list, select a post-click service. If you are only using one post-click service, this list is not displayed.
4. Select the desired period in the **Reporting Period** list.
5. Optionally, you can display values outside the selected evaluation period by activating the control box **Show values beyond the reporting period**. An additional segment with recipients whose most recent action took place further in the past than the selected period of time, and a segment with recipients that performed no action (*Remainders*) are displayed in the diagram.

   Example: If you selected the evaluation period **within the last 7 days**, then for the activated option **Show values beyond the reporting period**, nine segments are displayed in the diagram.

   - one each for the last 7 days
   - one for actions taken more than 7 days ago
   - one with recipients who performed no action (*Remainders*).

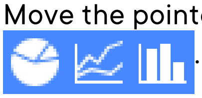
6. Click **Close**.

7. Move the pointer over the added analysis item and click the desired chart symbol: .

Frequency

> **Note:** You cannot use this item as a limitation.

Chart

1. Drag the analysis item from the left action area to the **Charts** area.
2. Enter an optional name for the chart. If you are using multiple analysis items of the same type, names help you differentiate them.
3. If you are using multiple post-click services, in the drop-down list, select a post-click service. If you are only using one post-click service, this list is not displayed.
4. Define the value ranges (number of actions) to display in the chart, starting with the smallest segment, for example, `0`. Then click **+** and add the next higher value range, for example, `2`, `5`, `10`. Repeat until you define all desired value ranges.
   - You can define up to 10 values ranges per chart.
   - If you enter multiple value ranges here, you receive a segmented evaluation in the chart.
5. Click **Close**.
6. Move the pointer over the added analysis item and click the desired chart symbol: .

Live Analytics detail view

The detail view shows limitations selected in the analysis accompanied by recipient segments as a chart. The upper right corner of the window shows the total number of recipients of segments and the analysis parameters. Use the **Save as Target Group** button to save the selected segments as a target group.

Displaying recipients

In the left column, at the top in each detail view of an analysis, use the **Show** drop-down list to choose between display options:

- **Potential recipients**. Potential recipients of the selected segments; that is, recipients from the recipient lists that correspond to the defined criteria. If you change the limitations of an analysis or select individual segments, the number of potential recipients is adjusted in real time. This number can include recipients who currently receive no mailings because they unsubscribed from the newsletter, exceeded the bounce limit, or are blocked.
- **Contacted recipients**. Recipients in the current selection who received at least one mailing. This does not mean that a campaign was sent with the segment shown in the analysis; it means that recipients were addressed using the same recipient lists and target groups as in the current analysis.

Activating limitations

The selected limitations are displayed in the left column. Refine or expand the displayed analysis by activating or deactivating limitations:

- **Entire limitation**. Clear to exclude the entire limitation.
- **Individual segments of a limitation**. Clear to exclude a segment from an analysis.
- **Interval or threshold value for numeric values**. To adjust the limitation interval or threshold value, move the slider for an interval or threshold value limitation.
- **Time interval for date fields**. To set or adjust the time interval, click the left date field and enter a starting date using the calendar. Then, click the right date field and enter an end date.

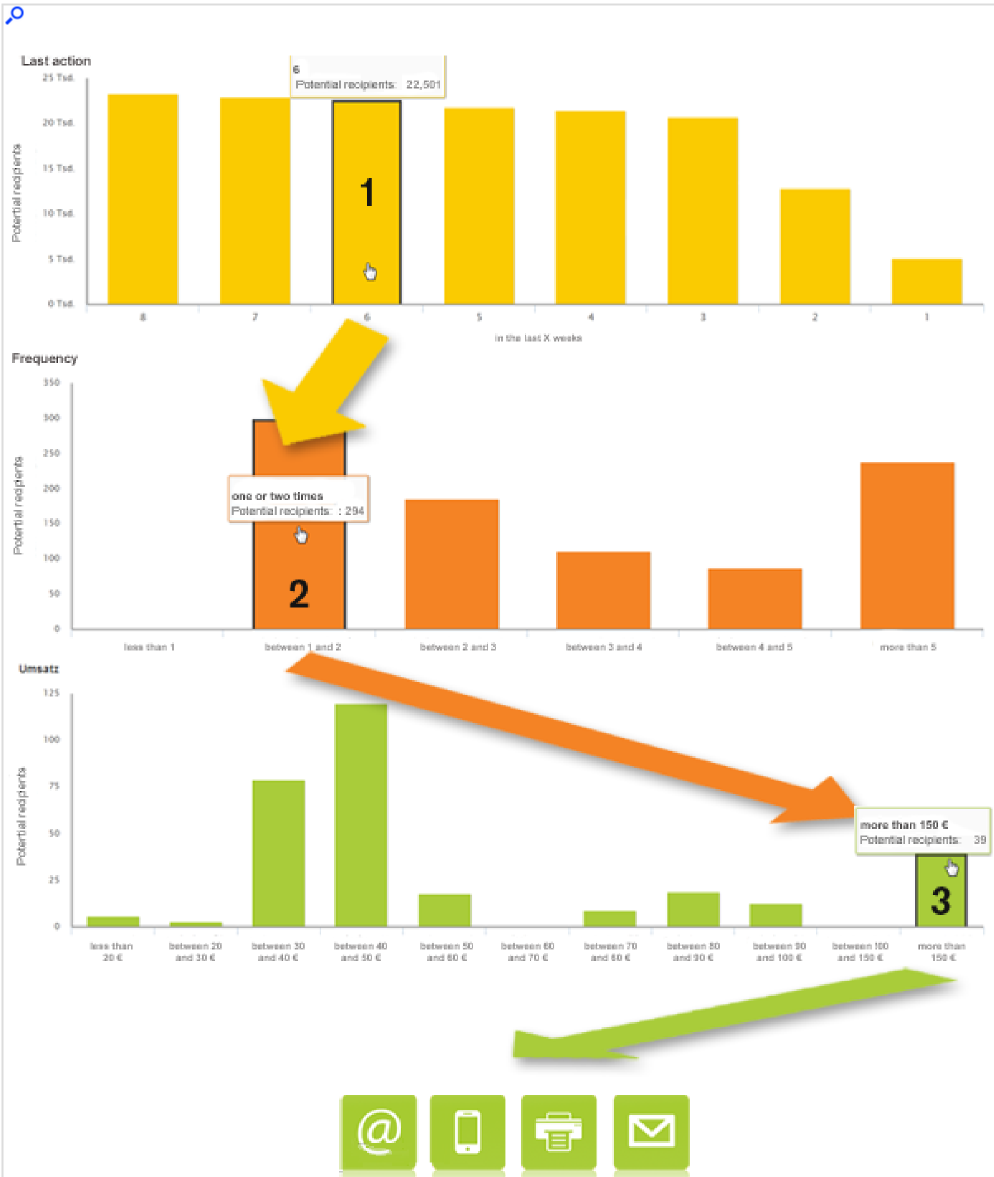
> **Note: Limitations**
>
> - If you select some limitations (not all), the number of potential recipients in an analysis decreases or remains the same.
> - If you select a limitation but the number of potential recipients does not change, the limitation is not relevant for the analysis.
> - If you select all limitations, the number of potential recipients increase, because all recipients from your client are considered.

Displaying ad-hoc segmentation

To receive the selected recipient segment, click a bar, point, or slice of the pie in a chart. The display of analysis data in the upper right changes to display the potential recipients and contacted recipients in the selected segment. If you created multiple charts in an analysis, the display changes in these charts too. Only recipients from the segment selected in the first chart are still displayed there.

You can now refine the selection of recipients by selecting an additional segment in these charts. After each selection, the display of the other charts adjusts to the refined selection.

© Optimizely 2022



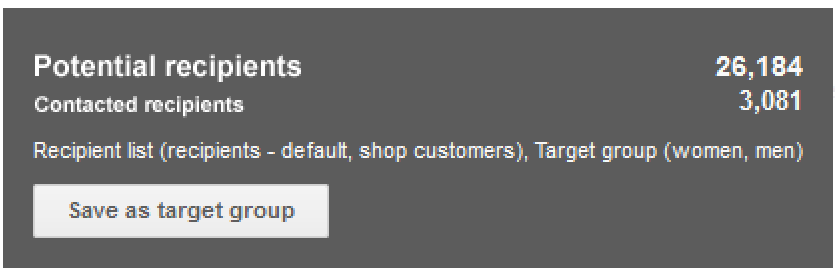
> **Tip:** The order in which you make the selection does not matter. You can start with any chart then select a segment in the other charts.

Example: Recipient segment from an RFM analysis:

1. Recipients whose most recent action (*purchase, product view, abandoned shopping cart*) took place in the last 6 weeks are selected.
2. These recipients are further limited to ones who performed one or two actions in the last 12 months. Purchases, product views and abandoned shopping carts are evaluated here too.
3. These recipients are limited to those whose purchases exceeded €150 in the last 12 months.

Saving a segment as a target group

After you select the desired recipient segment, you can save it as a target group to address these recipients in a campaign.



> **Note:** If a recipient is included in multiple categories, the potential recipients displayed in Live Analytics may differ from the actual number of recipients. If you want to calculate the exact number of potential recipients, use the analysis feature in the **Create Target Group** window (see also Target group analysis).

To save a segment as a target group, perform the following steps:

1. Hover over the gray field in the upper right corner in which the analysis data is displayed. The field becomes active and highlighted.
2. Click **Save as Target Group**. The **Create Target Group** window opens.
3. In the **Target Group Definition** area, in the **Client** list, select the client for which you want to create the target group.
4. Click **Properties**.
5. Optionally, select a folder in which you want to save this target group.

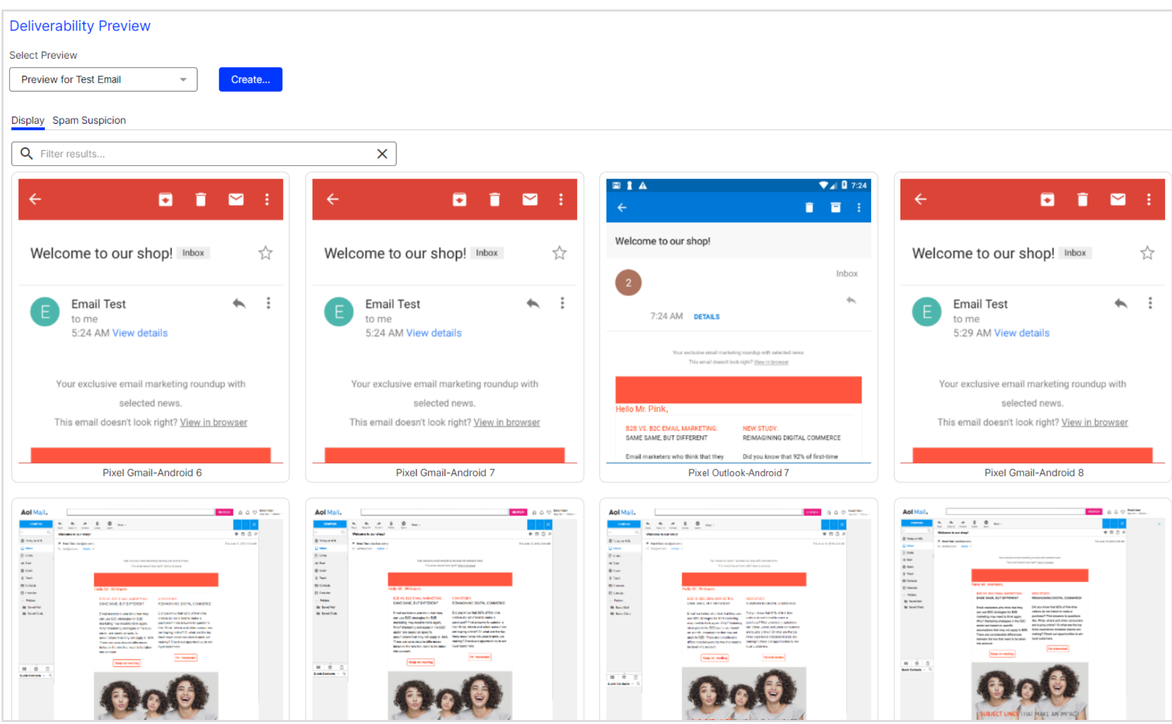
6. The name of the target group is generated according to the scheme **Created from [analysis title] on [date] at [time]**. If you want to give it a distinct name, delete this and enter the desired name.
7. Optionally, enter a description of the target group.
8. Click **Create**.

You can now select the target group in a regular campaign (in the menu item **Smart Campaigns**), or in an automated campaign (in the menu item **Marketing Automation**) and create a campaign for these recipients.

Deliverability preview

The deliverability preview lets you check your mailing before dispatch, whether the contents are displayed correctly and whether your mailing has been classified as spam by the most popular email providers. Optimizely works together with an external software service provider to analyze and create the deliverability preview.

To create or view a deliverability preview, open the Optimizely Campaign menu and select **Analytics** > **Deliverability Preview**.



Creating a deliverability preview

> **Note:** Deliverability previews have additional costs. For more information, contact customer support.

Prerequisite:

- Test recipient list (see Recipient lists)

To create a deliverability preview:

1. Click **Create...**.
2. In the **Select Mailing** drop-down list, select the mailing for which you want to create a deliverability preview.
3. In the **Select Test Recipient** drop-down list, select a recipient list.

   > **Note:** Only use test lists and no real customer data. See also Recipient lists.

4. In the **Name** field, enter a name for the deliverability preview.
5. Click **Create**.

   > **Tip:** The analysis and creation of the deliverability preview may take several minutes.

6. Click **Close**.

Viewing a deliverability preview

In the **Select Preview** drop-down list, select a deliverability preview.

> **Tip:** The results may not display immediately. In the **Select Preview** drop-down list, you can check the progress of each analysis under **Status**.

The deliverability preview has two tabs:

- Display
- Spam suspicion

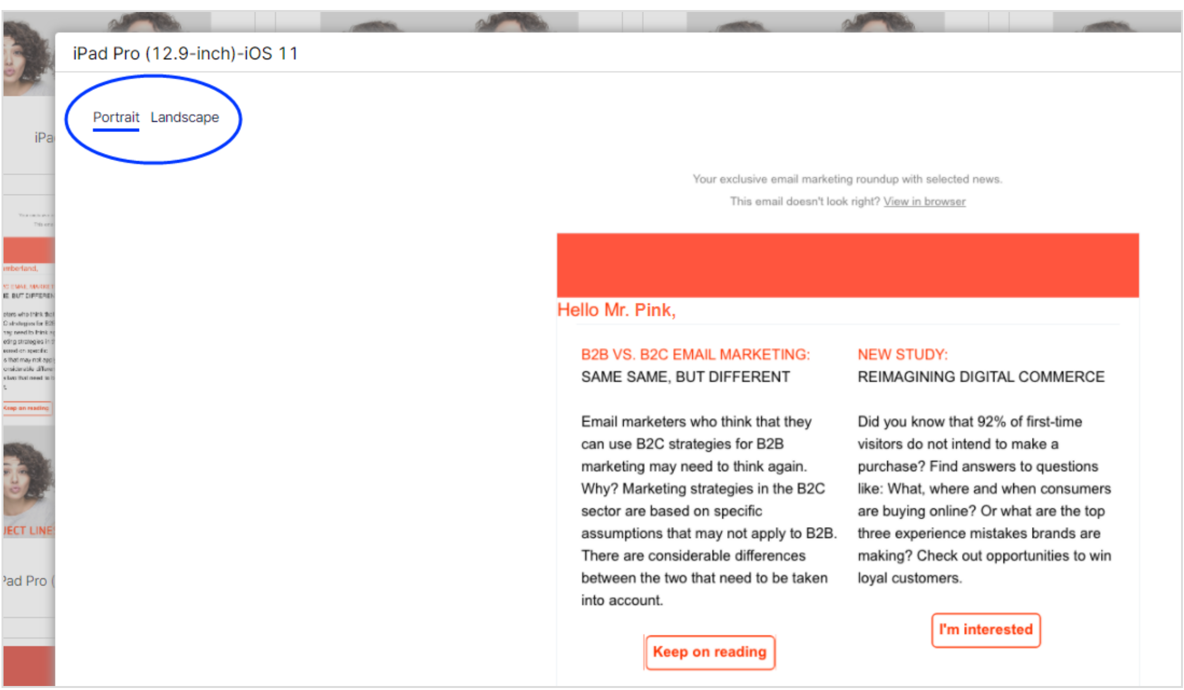
Display

The **Display** tab lets you preview how the graphics and fonts in your mailing are displayed by the most popular email providers and browsers.

To filter the results, enter a search term in the **Filter results...** field.

> **Tip:** For example, enter *iPad* to check the appearance on Apple iPads, or enter *Gmail* for the Gmail email provider.

Click a thumbnail to display the respective image. For some images, you can change the format from **Portrait** (vertical) to **Landscape** (horizontal). Click the desired format in the upper left corner of the image.

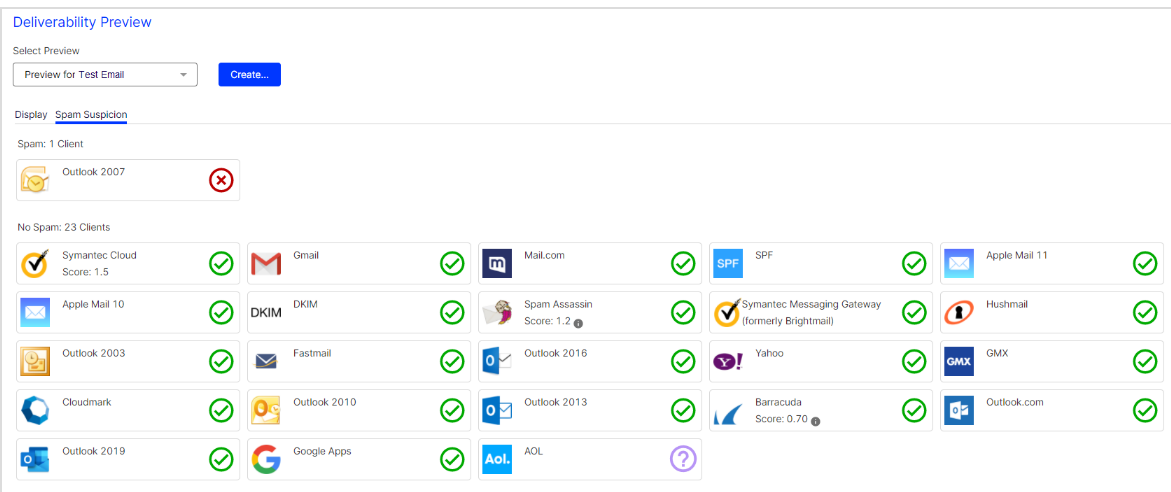


Spam suspicion

The **Spam Suspicion** tab provides an overview of whether your mailing has been classified as spam by the most popular email providers.

- The red icon indicates that your mailing has been classified as spam.
- The green icon indicates that your mailing has arrived at the respective email provider.
- The violet icon indicates that no result is available yet.

If available, the spam score is also displayed and you can view further information on the spam filters by hovering over the info symbol . See also: Notes on spam filters of each client.



— Notes on spam filters of each client—

Client	Description
Inbox folder test	
Gmail	Gmail's spam filter is part of the standard Gmail service. Gmail is supported in all browsers and in several mobile applications. The test uses Gmail's default spam filter settings. In Gmail, recipients can manage incoming messages using filters that allow

Client	Description
	them to automatically label, archive, delete, star or forward an email, or keep it from entering the spam folder in the future. They can also add senders to the address book to prevent future emails to be sent to the spam folder. These options are not considered for this test. **Note:** Gmail's spam filters also work in IMAP clients. IMAP clients can be used on iPhone, iPad, Android, Kindle Fire, Thunderbird, Apple Mail, Outlook 2003, Outlook Express and others. This means that your email might have to pass a combination of two filters to access the inbox. Gmail recommends turning off any additional anti-spam or junk mail filters within those clients to improve performance. However, this is not enabled by default and some clients might not allow different spam settings for several accounts.
Outlook.com	Outlook.com's spam filter is part of the Hotmail service. The test uses Hotmail's default spam filter settings. Recipients can add senders to their address book to prevent that future emails are sent to the spam folder. This option is not considered for this test.
Outlook 2003, 2007, 2010, 2013, 2016, 2019	Outlook's spam filters are part of the respecting Outlook desktop client of version 2003, 2007, 2010, 2013, 2016 or 2019. The test uses Outlook's default spam filter settings.
Yahoo!	Yahoo!'s spam filter is part of the Yahoo! service. The test uses Yahoo!'s default spam filter settings. Recipients can add senders to their address book to prevent that future emails are sent to the spam folder. This option is not considered for this test.
Fastmail	Fastmail's spam filter is part of the Fastmail service. Recipients can add senders to their address book to prevent that future emails are sent to the spam folder. This option is not considered for this test.
GMX	GMX's spam filter is part of the GMX service. The test uses GMX's default spam filter settings. Recipients can add senders to their address book to prevent that future emails are sent to the spam folder. This option is not considered for this

Client	Description
	test.
Hushmail	Hushmail's spam filter is part of the Hushmail service. The test uses Hushmail's default spam filter settings. Recipients can add senders to their address book to prevent that future emails are sent to the spam folder. This option is not considered for this test.
Mail.com	Mail.com's spam filter is part of the Mail.com service. The test uses Mail.com's default spam filter settings. Recipients can add senders to their address book to prevent that future emails are sent to the spam folder. This option is not considered for this test.
Google Apps	Google purchased this service formally known as "Postini" and merged all of the functionality into its Google Apps offering. Since then, few information in regards to reasons for SPAM is available. Google Apps now only reports if an email is considered "Spam" or "Phishy". If an email is marked as "Phishy" it will also be marked as "Spam".
Apple Mail 10, 11	Apple Mail's spam filters are part of the respecting Apple Mail desktop client of version10 or 11. The test uses Apple Mail's default spam filter settings.
Anti-spam filter test	
Spam Assassin	The rating system of Spam Assasin consists of positive or negative scores, with positive values indicating "spam" and negative values indicating "ham" (non-spam messages). By default, Spam Assassin considers a score over 5 to reflect a probable spam message. However, this can be changed to a lower or higher value depending on the recipient's spam restriction preferences. • Score < 5 is recommended
Symantec Cloud	Symantec MessageLabs Email Security.cloud service combines advanced email antivirus, antispam, and content filtering capabilities in a solution that requires no on-site hardware or software. • Score < 7 is recommended
Barracuda	Barracuda is a Gateway Appliance which eliminates spam and virus intrusions while safeguarding an organization's reputation through content inspection

Client	Description
	based on policy for both inbound and outbound email. Barracuda Spam scores are as follows: • Score < 3.5 is recommended • **3.5** – subject line gets modified. • **6**– message gets blocked. • **10** – message gets quarantined.
Cloudmark	Cloudmark's spam filter is offered as an email client plug-in and gateway service. The test uses the default spam filter settings that is standard in either the plug-in or gateway service.
Symantec Messaging Gateway (formerly Brightmail)	Symantec Messaging Gateway service combines advanced email antivirus, anti-spam, and content filtering capabilities in either a hosted solution or a virtual appliance.
Validation test	
SPF	Sender Policy Framework (SPF) is an email validation system designed to prevent email spam by detecting email spoofing by verifying sender IP addresses. SPF allows administrators to specify which hosts are allowed to send mail from a given domain by creating a specific SPF record (or TXT record) in the Domain Name System (DNS).
DKIM	DomainKeys Identified Mail (DKIM) is a method for associating a domain name to an email message, thereby allowing a person, role, or organization to claim responsibility for the message. The association is set up by means of a digital signature which can be validated by recipients.

> **Note:** Optimizely cannot view nor influence the parameters used to check the spam suspicion. The results of this analysis do not guarantee that your mailing will lead to the same ratings of a real mailing dispatch. The reputation of Optimizely Campaign as an email service provider is not considered in the analysis.

Tip: To learn how to optimize your mailing, see Deliverability basics.

Post-click tracking

Note: This topic is for administrators and developers with administration access rights in Optimizely Campaign.

Post-click tracking lets you analyze actions by email recipients on your website. You can see if a customer placed or canceled an order, viewed a product, and based marketing actions on this information.

To integrate post-click tracking and use collected data in email marketing, every visitor action must be assigned to a recipient with an email address. Post-click tracking and target groups include these functions:

- **Date and time range selection**. Configure post-click filters so that only post clicks generated in a defined time range or at a specific date are matched.
- **Autocomplete for product names**. Input fields for product names or similar, are designed as drop-down lists or with an autocomplete function, to ensure correct entries when creating target groups.
- **Mailing-independent customer actions**. Import post-click data not assigned to a mailing, but with an email address. For example, if a new customer orders for the first time providing an email address, order details are available as post clicks in the target group module when this customer registers for a newsletter.
- **Universal interface for integrating web analytics software**. Integrate almost any web analytics software in a unidirectional way, such as Google Analytics, eTracker, Adobe Analytics and Webtrekk.

Note: To correctly associate post-click tracking with a recipient list, recipients must have at least a mailing ID and a recipient ID.

© Optimizely 2022

Setup

In your Optimizely Campaign client

If post-click tracking is set up together with your client configuration, you can use one or more post-click services (this is either Optimizely's post-click tracking or the web analytics software you are using) in one client. If you are not sure that post-click tracking is configured in your client, contact customer support. For each post-click service, the desired categories to be tracked are defined. Typical categories are *purchased products*, *viewed product*, *product group* or numeric values like *product price* or *revenue*. Use these categories to define target groups or evaluate the success of mailings.

On your website

The proprietary post-click tracking uses *tracking pixels*, a transparent image file (GIF) of one pixel width and height, which is loaded from a server when a customer clicks on a link. Loading of the file will not be noticed, and when done, the URL of the tracking pixel and attached parameters are submitted to the post-click tracking server.

The parameters represent the defined categories, the mailing ID (except for customer actions where no mailing is necessary), and the recipient ID, usually the email address. Integrate the tracking pixel on an appropriate page, such as the "thank you" page displayed after placing an order. The post-click tracking server stores the data in a database available to Optimizely Campaign, together with the detected click time.

One tracking pixel can transmit up to 19 values (nine string values and ten numeric values). One parameter is reserved as an identifier, ensuring that each post click is only tracked once, such as when a page is reloaded.

Storing the SSL certificate

If the site where the tracking pixel is implemented uses an SSL certificate, the post-click tracking also needs this. To order and store the certificate on Optimizely's server, provide Optimizely with the following:

- **A domain**. Domain name, such as *example.com*, for which the certificate is issued.
- **A contact person from your IT department**. First name, last name, company name, address, CIP code, phone number, email address and fax address (if available).
- **A contact person for organizational issues**. First name, last name, company name, address, CIP code, phone number, email address and fax address (if available).
- **An administrative email address**. For administering the certificate, must have the same domain part as the domain the certificate is issued for. Example: If your domain is *newsletter.example.com*, the email address must be one of *admin@example.com*, *administrator@example.com*, *hostmaster@example.com*, or *webmaster@example.com*. Note that only the local parts **admin**, **administrator**, **hostmaster** or **webmaster** are allowed.

Creating a tracking pixel

A tracking pixel consists of an image URL, which is added to your website:

```
<img src="{url}" width="1" height="1" alt="" border="0">
```

The placeholder `{url}` must be replaced by the actual URL, to which the submitted parameters are attached. You can create a tracking pixel with or without a cookie.

Tracking pixel with cookie

When a mailing recipient clicks on the tracking link, a cookie is created that contains recipient data such as recipient ID and mailing ID. You can use additional parameters for the tracking pixel, for example to attach product names, prices and item numbers.

In the example, replace *news.example.com* with your URL.

```
http://news.example.com/pc
?mg=1234567890&bi=0&service=default
&fvalue1=[product ID]
&fvalue2=[number of items]
&fvalue3=[price]
&gvalue1=[category1]
&gvalue10=[order number+product ID]
```

© Optimizely 2022

Parameters

- **mg**. Mailing group. Submits the ID of your Optimizely Campaign client. To see the client ID, open the Optimizely Campaign menu and select **Administration** > **API Overview** > **REST API**.
- **bi**. Browser identifier. Is set to 0 by default. The user agent of the browser is used. If you have a proprietary implementation identifying the user agent, you can submit the value with this parameter.
- **service**. Identifies the post-click service to be used. In this example, the proprietary Optimizely Campaign post-click tracking (**default**) is used.
- **fvalue1** to **fvalue10**. Can be used to submit ten different numeric values (example names in brackets).
- **gvalue1** to **gvalue9**. Can be used to submit categories (string values).
- **gvalue10**.Is reserved for the identifier, for example shopping cart ID. If multiple tracking pixels are used for each product, this identifier must also contain the product ID, to differentiate the tracking pixels.

> **Note:** The identifier is an indispensable parameter that assures the creation of unique post-click data. Missing or incorrect identifiers may cause data loss or incorrect sales figures.

Use case

A common use case is tracking of sales figures like revenue, number of bought items, order number, and shopping cart ID. Place a tracking pixel on the order placement page. Only one tracking pixel is necessary. The URL, including attached parameters, is as follows:

```
/pc?mg-
=1461858149&b-
bi=0&service=default&fvalue1=20.0&fvalue2=3&fvalue3=8866442211&gvalue1=
mark.spencer@example.com&gvalue10=1234567890
```

- /pc?mg=1461858149&bi=0&service=default&fvalue1=20.0 **= Revenue**
- &fvalue2=3 **= Number of bought items**
- &fvalue3=8866442211 **= Order number**

- &gvalue1=mark.spencer@example.com **= Customer's email address**
- &gvalue10=1234567890 **= Shopping cart ID**

For more data, you can load a tracking pixel for each item bought. The URL used for the tracking pixel is identical for each tracking pixel; only the attached parameters are different. With this setting, post-click data for product ID, product name, and price, can be submitted. The tracking pixel URL is the same as in the example above. An additional parameter with the product ID (fvalue) and/or the product name (gvalue) is submitted.

Tracking pixel without cookie

If you use a tracking pixel without a cookie, you must append the mailing ID and recipient ID directly as parameters. You send the data to Optimizely Campaign, where you can analyze it as a post click. You can use additional parameters for the tracking pixel, for example, to attach product names, prices and item numbers.

In the example, replace *news.example.com* with your URL.

```
http://news.example.com/pc
?type=userEvent
&authToken=[Autorisierungs-Code]
&service=default
&recipientId=[Empfänger-ID]
&mailingId=[Mailing-ID]
&fvalue1=[Artikelnummer]
&fvalue2=[Anzahl]
&fvalue3=[Einzelpreis]
&gvalue1=[Kategorie1]
&gvalue10=[Bestellnummer+Artikelnummer]
```

Parameters

- **type**. Identifies the tracking pixel type. The *userEvent* type does not contain a cookie with additional recipient data.
- **authToken**. Authorization code for the data transfer to Optimizely Campaign. To see the authorization code, open the Optimizely Campaign menu and select **Administration** > **API Overview** > **Post-Click Tracking**. You can find the authorization code in the **User Event Basic URL**.

- **service**. Identifies the post-click service to be used. In this example, the proprietary Optimizely Campaign post-click tracking (**default**) is used.
- **recipientId**. Recipient ID, usually the email address.
- **mailingId**. Mailing ID.
- **fvalue1** to **fvalue10**. Can be used to submit ten different numeric values (example names in brackets).
- **gvalue1** to **gvalue9**. Can be used to submit categories (string values).
- **gvalue10**. Is reserved for the identifier, for example shopping cart ID. If multiple tracking pixels are used for each product, this identifier must also contain the product ID, to differentiate the tracking pixels.

> **Note:** The identifier is an indispensable parameter that assures the creation of unique post-click data. Missing or incorrect identifiers may cause data loss or incorrect sales figures.

Working with post-click data

> **Note: Third party web analytics programs**
>
> To create reports and analyses with third party web analytics programs, use the web interface of the respective program. See the respective user documentation for reporting options.

Analyzing and monitoring mailing campaign success

Use Optimizely Campaign Deep Analytics to add a post-click measure to a report:

1. Create or edit a report template or an ad-hoc report, see Deep Analytics.
2. In the **Report Data** tab, click **+ Add measure...**. and then **Post Click...**.
3. In the **Name** box, enter a name for the post-click measure.
4. If using more than one service (provider), select the provider from the **Service** drop-down list.

5. In the **Value** drop-down list, select whether the measure you want to create is a number, a sum or an average.
6. If you have selected **Sum** or **Average** in the previous step, select a post-click value from the drop-down list. If you do not want to filter this value further, the definition can be saved. If you have selected **Number** in the previous step, no filters can be added.
7. To add filters, in the **Filter** area, click **Add +**.
8. In the **Category** drop-down list, click a post-click value/category and select an operator. Options depend on whether the selected post click is a number or a string value.
9. Enter a reference value to compare the post-click value with.
10. Click **Apply ✓** .
11. To add further filters values, click **Add +** and repeat the previous steps.
12. Click **Save**.
13. Continue editing the template/ad-hoc report as described in the user documentation, and execute the report.

Example: Create the post-click measure Men's fashion revenue

1. In the **Value** drop-down list, click **Sum** and then in the **of** drop-down list, click **Revenue**.
2. In the **Filter** area, click **Add +**.
3. In the **Category** drop-down list, click **Shop category** and select the **equals** operator.
4. Enter the reference value *Men's fashion*.
5. Click **Apply ✓** .
6. Click **Save**.

> **Note:** The example requires that a parameter with the **shop category** is passed in your tracking pixel.

Filtering target groups with post clicks

Do the following to create a target group with a post-click filter:

1. Open the Optimizely Campaign menu and select **Recipients** > **Target Groups**.
2. Click **Create**.

3. In the **Name** box, enter a name for the target group and in the **Target Group** area, click **Add +**.
4. In the second drop-down list, click **Action**.
5. In the following drop-down list, click **has created post click**.
6. If using more than one service (provider), select the provider from the **Service** drop-down list.
7. To only consider post clicks created from mailings, select the mailings from the **Mailing** drop-down list. If no mailing is selected, both mailings and actions not created from a mailing (customer actions) are considered.
8. Select a date or time in the **Period** drop-down list to select only post clicks created within a defined time range or at a certain date. Time entered as a number of days ("Exactly 30 days ago") refer to the current day.
9. In the **Category** drop-down list, click a post-click value/category and select an operator.
10. Enter a reference value to compare the post-click value with.
11. Click **Apply ✓** .
12. To add further filters values, click **Add +** and repeat the previous steps.
13. Click **Create**.

Example: Create the target group "Buyers—Men's fashion"

To define a target group that contains buyers of men's fashion of the first quarter of 2022, do the following in the **Create target group** window:

1. In the **Name** box, enter *Buyers—Men's Fashion* and in the **Target Group** area, click **Add +**.
2. In the second drop-down list, click **Action** and in following drop-down list, click **has created post click**.
3. In the **Period** drop-down list, click **From...until...** and select the period from 1 January 2022 to 31 March 2022.
4. In the **Category** drop-down list, click **Shop category** and select the **equals** operator.
5. Enter the reference value *Men's fashion*.
6. Click **Apply ✓** .
7. Click **Create**.

© Optimizely 2022

> **Note:** The example requires that a parameter with the **shop category** is passed in your tracking pixel.

Visual link analysis

The visual link analysis shows how often each link in a mailing is clicked. The analysis data is displayed directly over a screenshot of the original mailing to reveal correlations that might not be obvious, such as if recipients tend to click links in a certain area.

© Optimizely 2022


Unlocking the Intent Data Code
Get the guide
3 (1.07%)
ABM vs individualized marketing, Natural Language Processing,
and how first and third-party data work within your MarTech stack
Hi
As a company selling tools primarily for marketers, we get asked a lot of questions about emerging and existing trends. That's why we decided to take a closer look at these trends and dive into the most popular questions. In our first guide we take on Intent Data.
Even though Intent Data has been around for a while the hype surrounding it is still strong. Read our guide to unlock the Intent Data code and understand what's the real deal and what's just hype.
This guide covers:
How to make sense of first-party intent data
Differences between individualized and account-based marketing
How natural language processing works
The building of an interest profile
ID stitching across marketing automation
How first and third-party data differ
15 (5.36%)
Get the answers
15 (5.36%)
PS: You can get even more answers in our related on-demand webinar. Watch it now: "Unlocking the Intent Data Code: Separating Fact from Fiction with First-Party Intent".

To create a visual link analysis, perform the following steps:

1. Open the Optimizely Campaign menu and select **Analytics** > **Visual Link Analysis**. The **Visual Link Analysis** window opens.
2. Click the **Mailings** box and the mailing you want to analyze.
3. In the **Show Click Rate** drop-down list, click the type of clicks you want to analyze:
   - **All clicks**. Each click is counted, including multiple clicks from the same recipient.
   - **Unique clicks**. Multiple clicks from the same recipient on one URL are only counted once. If a recipient clicks on different links to the same URL (such as text and image), this is one unique click also, because not the link itself, but the URL to which it links, is decisive.

   > **Note: Calculation of the unique click rate**
   >
   > The unique click rate for each link is calculated in relation to the total number of unique clicks on each link in the mailing. This differs from the unique click rate of the whole mailing, as given in the mailing report.
   >
   > In the visual link analysis, one recipient can generate one unique click for each link in the mailing. The total number of unique clicks is usually higher than the total number of unique clicks as given in the mailing reports, because some recipients click various links in the mailing. The percentage of unique clicks for each link is calculated in relation to this number. Note that unique clicks in the overall mailing report and unique clicks in the visual link analysis are not identical, since they are calculated differently.

4. In the **Reference Parameter** list, click the reference value you want to use to display the attractiveness of the individual links:
   - **Percent of all recipients**. Shows the clicks on a link in relation to recipients of the mailing.
   - **Percent of all (unique) clicks**. Shows the clicks on a link in relation to unique clicks on links of the mailing.

© Optimizely 2022

- **Percent of all recipients/(unique) clicks**. Shows the clicks on a link in relation to unique clicks on links in the mailing and in relation to recipients of the mailing.

5. If your client is set up for post-click tracking , in the **Additional Data** list, you can select the post-click option. It shows the post-click actions created from each link, such as the number of items bought. The data shown in this option depends on the kind of data tracked via post-click tracking.
6. Click **Show**. The visual link analysis is started.
7. To show only elements assigned to specific target groups, click **Target Groups...**, select one or more target groups, and click **Submit Selection**. In the background, a screenshot of the mailing is shown. Over each link, the respective numbers (clicks and percentages) are shown.

> **Tip:** You can switch between versions of your mailings by clicking the appropriate tab (**HTML**, **Mobile** and **Text**). Optionally, you can save the analysis result by clicking **Save result as image**.
>
> The box also has a color indicator: White means a link has not been clicked; yellow indicates a low click rate, orange medium click rate, while red means frequent click rate.

> **Note: Multiple links with the same link target**
>
> Multiple links to the same URL, such as an image and a text link, are not analyzed separately. That is, the total number of clicks/unique clicks is shown for each link item to the same URL. You cannot determine if recipients preferred clicking an image or a text link to the URL.

Visual link analysis of post clicks

> **Note:** To enable this feature, contact customer support.

The visual link analysis feature displays a graphical representation of post clicks. You can configure several post-click parameters, such as item price, item number, or total price. The selected parameters are displayed as a sum, average, or quantity. This allows various analyses to be visualized, such as:

- Total revenue generated by a link
- Average revenue generated by a link
- Number of orders resulting from a link

Attention analysis

Using the attention analysis, you can test the usability of your mailings, templates or drafts before sending them out. A graphical analysis lets you check if crucial elements (logo, call-to-action, promotional offers) are placed to immediately draw a viewer's attention.

© Optimizely 2022

To access Attention Analysis, open the Optimizely Campaign menu and select **Analytics** > **Attention Analysis**. The overview shows how many analyses you created, and a list of created and requested analyses.

How it works

Attention analysis forecasts the first seconds of viewing a mailing. Like any image, upon first glance, an email scanned by the human eye. During scanning, the focus rests several times on the fixation points. Image information is processed subconsciously at this time.

The Optimizely Campaign attention analysis is not a semantic analysis; that is, it does not analyze the meaning of words, the content of images, and so on. It analyzes visual, physical stimuli and deduces how much attention each item and area of the image receives.

Each analysis consists of more than 50 image properties, such as colors, brightness, contrast, size, position, color saturation, outlines, and textures. This data is processed to forecast the viewing behavior. The forecast model was designed using attention signatures of real, test persons. WhiteMatter Labs develops and verifies this model constantly. The result helps to optimize size, color, and placement of items to make them more eye-catching.

EyeQuant Software by WhiteMatter Labs

Attention analysis is based on the EyeQuant Software developed by WhiteMatter Labs. WhiteMatter Labs is a spin-off founded by Prof. Dr. Peter König, one of the leading European neuroscientists from the University of Osnabrueck. WhiteMatter Labs makes the results of long-term fundamental research usable in marketing.

Until this time, analyzing user behavior meant conducting expensive eye tracking studies with large sample sizes. With EyeQuant, real test persons are no longer necessary. Neuroscientific models allow forecasting of viewing patterns within seconds. The attention analysis is specifically developed to analyze newsletters, websites, and related items. The seamless integration in Optimizely Campaign lets you run Attention Analysis as an part of a continuous optimization process for mailing campaigns:

- Evaluation of different design drafts at the first stage
- Pre-test of templates, landing pages and micro sites
- Testing of special design elements in the course of perception

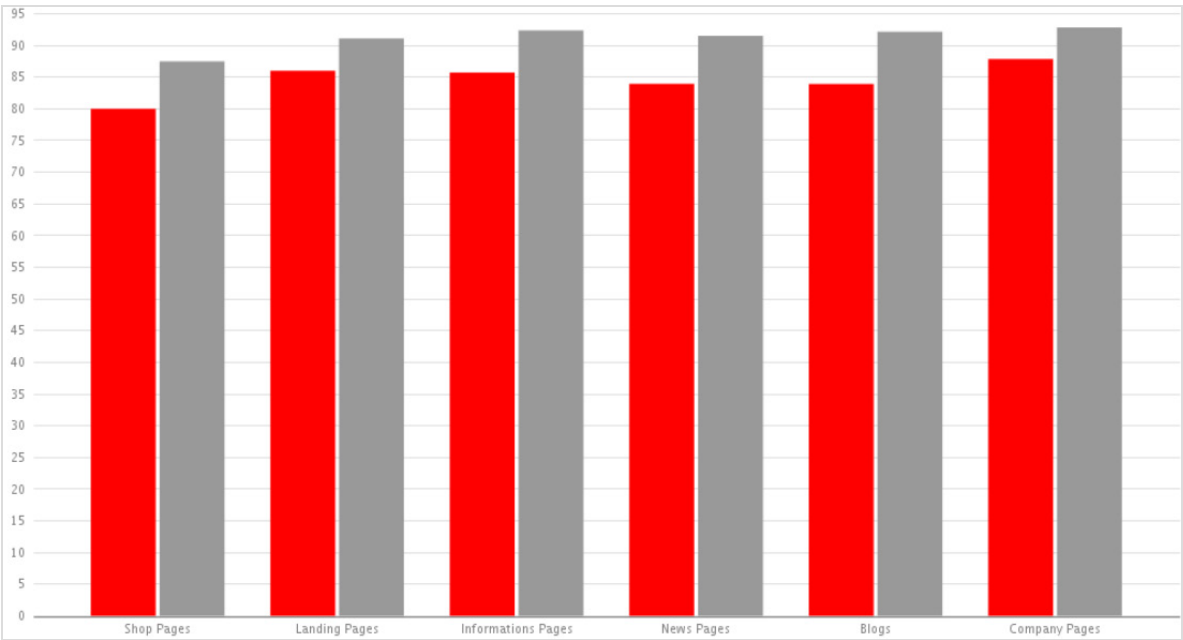
Validity

The forecast model of attentional deployment is based on a statistical evaluation of more than 15,000 tested images. The viewing behavior of more than 300 test persons is analyzed to create attentional signatures and to calibrate the model. A comparative study with empirical eye tracking data on the predictive power has found a high correlation of both – empirical data and computed data. While eye tracking studies reached a predictive accuracy (that is, correlation of forecast and effective eye movement) of approximately 90%, automatically created attention analyses reached about 85%.

© Optimizely 2022

Predictive power (in percent)

red = EyeQuant model
gray = Eye tracking study



Creating attention analyses

You can create attention analyses based on an uploaded screenshot or a mailing or landing page.

Analyzing a screenshot

> **Note:** Attention analyses have additional costs. For more information, contact customer support.

1. In the **Attention Analysis** window, click **New Analysis…**. The **New Attention Analysis** window opens.
2. Click **Screenshot Upload** and then **Select**.
3. Click **Browse…** and select the screenshot from your local hard disk.

4. Optionally, enter a description of the analysis and click **Preview**.
5. If you are satisfied with the screenshot shown in the preview, click **Start Analysis**.

- Maximum file size: 5 MB
- Supported formats: PNG, JPEG, BMP and GIF
- The image is scaled automatically. This may result in very small images, for instance if the original page orientation is an extreme portrait.

Analyzing an existing mailing or landing page

Note: Attention analyses have additional costs. For more information, contact customer support.

1. In the **Attention Analysis** window, click **New Analysis...**. The **New Attention Analysis** window opens.
2. Click **Mailing** then **Select**.
3. In the mailing overview, select the mailing you want to analyze. To analyze a landing page, you must also select the mailing with which it is associated.
4. In the **Mailing Part to Analyze** area, in the list, select the mailing or the landing page. If you have not created any landing pages for your mailing, the mailing is the only option in this list.
5. Optionally, enter a description of the analysis and click **Preview**.
6. If you are satisfied with the screenshot shown in the preview, click **Start Analysis**. After a few seconds, the analysis is available. You can select between the following modes:
   - **Perception Map**. The first layer of the attention analysis shows which areas gain most attention in the first moments of perception. These areas should contain logos, specially formatted product information, and so on. Small areas mean more focused attention, while larger areas indicate a more dispersed attention. Images with little contrast in color and brightness probably disperse the initial attention more widely.

- **Attention Map**. The second layer analyzes the attentional potential of the elements in the overall context of the mailing. Red and yellow areas indicate a high attentional potential, while blue and turquoise areas indicate a low attentional potential. Items with red and blue parts have a high attentional potential, because they are perceived as one item. As said above, a high contrast between an item and the background leads to a more focused attention.

Tip: Attention analysis is based upon universal laws of perception. But some aspects, such as the perception of an image from above left to below right, are cultural patterns so only apply to occidental viewers.

Displaying a previously-generated analysis

1. Open the Optimizely Campaign menu and select **Analytics** > **Attention Analysis**. The overview displays generated analyses.
2. To view the result, click an analysis in the **Analyses** list, then either **Perception map** or **Attention map**.

Interpreting results

Attention analysis gives useful indicators on how to optimize mailings or landing pages:

- Are products you want to promote in the newsletter eye-catchers?
- Is the product information (description, image, price) properly placed and grouped?
- Are the calls-to-action integrated in the perception path, so a viewer can follow them easily?

Too much attention might have a negative impact on the mailing performance:

- Less important items might be more eye-catching than other, more important items.
- The viewer might be distracted by too many items with a high attentional potential.
- Very eye-catching items might appear too blatant for certain recipients.

Optimizing options

- Strong contrasts of fore- and background attract the attention. Contrasts can be achieved through brightness (black/white) and through colors.
- Complementary colors (for example red/green) create a higher contrast and more attention than colors that lie closer in the color space.
- Images are more eye-catching when the background is masked and uncolored (high figure-background contrast).
- The general attention path in the occident goes from the top left to the lower right. You can follow this pattern or break it up intentionally using an eye-catching item.
- The left upper corner gains high attention. Usually, logos are placed here.
- A second area that gains particular attention lies between the left upper corner and center. This area is often the viewer's point of entry.
- Grouping eye-catching items with less eye-catching ones (relative positioning) can heighten the attention for all items. For example, to make an item more eye-catching, place it close to an item that receives a lot of attention.
- To heighten attention for an item, place it in a "calm" environment.
- Less is more. Few eye-catching items may be better than too many. The more eye-catching items you place in your newsletter, the more they compete against each other.

© Optimizely 2022

Optimization example

This sample newsletter, at first glance, is clearly structured and well-arranged. The title is eye-catching, but the attention analysis shows that only one of the three promoted products below receives some attention. The product price, although in red, is not focused on by the viewer:

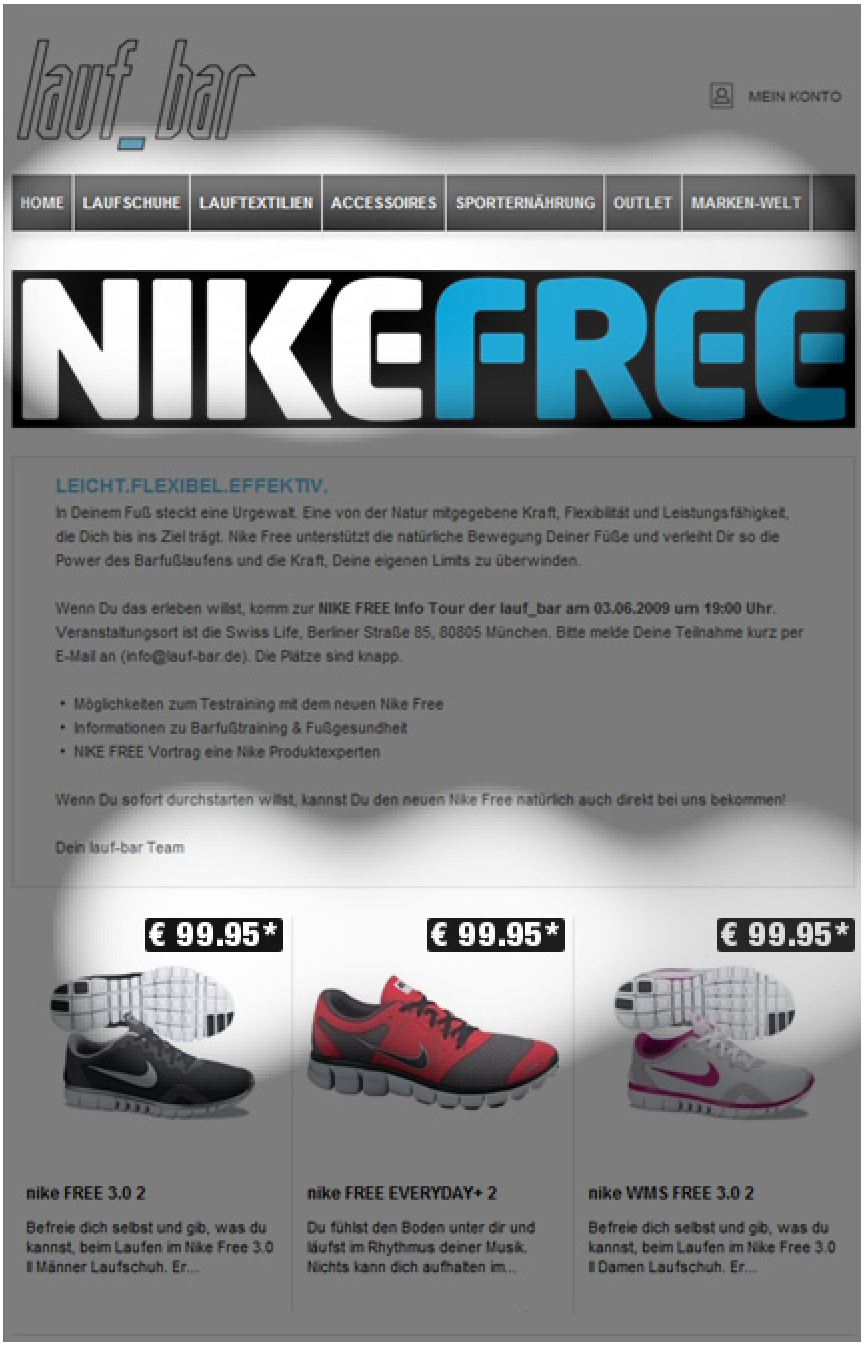
Initial design

The analysis perception map shows a focus on the first product shown.

This is an optimized version of the same newsletter. Some changes are made: The price is positioned closer and top-left to the product. Instead of the red font, an inverted font, similar to the title, is used. These changes cause a significant shift of attention:

Optimized

The perception is equally distributed on the three products – a focus is on the prices.



Activity overview

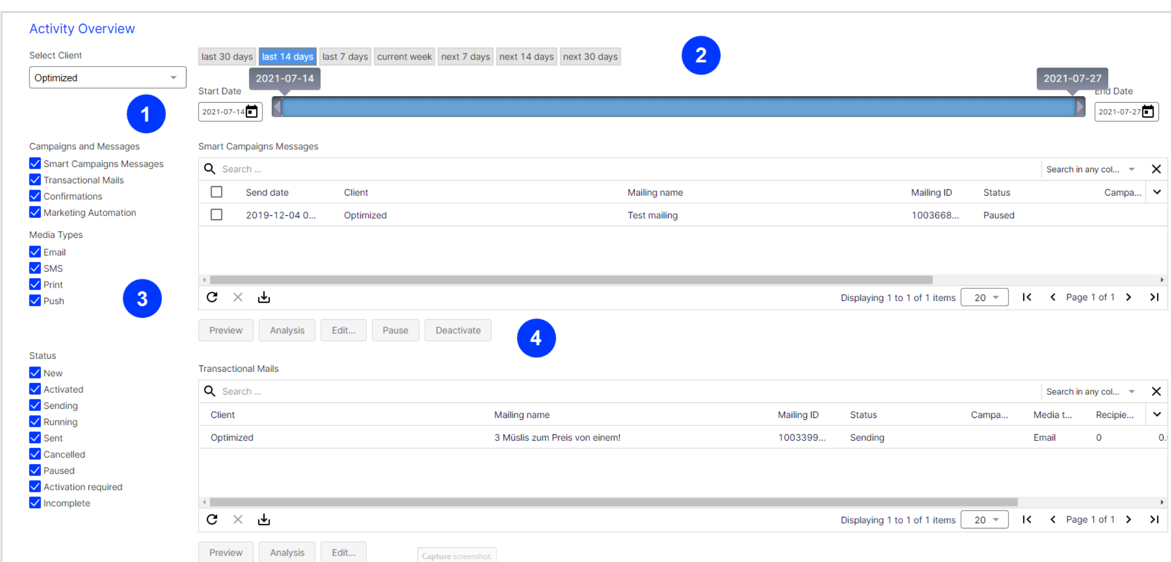
> **Note:** To enable this feature, contact customer support.

The activity overview shows mailings for a defined period. The view's information helps you evaluate marketing activities, such as which customer dialogs you have sent, are currently sending, and are about to send. Transactional mails, registration confirmations and running Marketing Automations are also supported.

If your company has subsidiaries, branches, or affiliate companies, you can plan, steer, and control campaigns from your branches and associated companies using the activity overview.

The activity overview display has four areas:

- Area 1. Select one or more clients.
- Area 2. Select the period.
- Area 3. Filter mailings by mail type, media type (marketing channel), and mailing status.
- Area 4. The activity overview shows a content preview of a selected mailing, opens a campaign analysis, switches to the edit window of a selected element or pauses/deactivates a campaign or a mailing.



Area 1: Select client

1. Open the Optimizely Campaign menu and select **Analytics** > **Activity Overview**. The **Activity Overview** window opens.
2. In the **Select Clients** list, choose one or more clients to display in the overview.
    - The client you to which are logged in is selected. To stop analyzing this client, clear the corresponding check box.
    - If you want to select clients of your user account, select the check box on the upper left, in the list header.

Area 2: Select period

To select the period for which to display marketing activities, perform one of the following steps.

- Click a button: **last 30 days**, **last 14 days**, **last 7 days**, **current week**, **next 7 days**, **next 14 days** or **next 30 days**.
- Select the **Start Date** and **End Date** with the date selector.
- Drag the date slide to the desired start and end dates.

> **Note:** Entering a time period has no effect on the action data displayed (openings, clicks, bounces, subscription cancellations) nor on the number of recipients shown in the transactional mail and registration confirmation overviews. The action data displayed and the number of recipients represent the value for the entire time period in which a transactional mail or registration confirmation is, or was, active.

Area 3: Filter mailings and campaigns

To filter for campaigns and messages, media type (marketing channel), or mailing status, perform the following steps:

- **Campaigns and Messages**. Select mailings or Marketing Automation campaigns.

> **Tip: Transactional mails** include Marketing Automation mailings. To include mailings from Marketing Automation campaigns in the activity overview, check the box next to **Transactional Mails**.

- **Media Types**. Select media types to include in the activity overview.
- **Mailing Status**. Select the mailing statuses to include in the activity overview.

Area 4: Open activity overview and other features

If you selected at least one client, mailing type, media type (marketing channel) and mailing status, the activity overview appears in area 4. The activity overview is automatically updated if you change settings in areas 1, 2 or 3.

The following buttons let you perform actions on the overview.

- **Preview**. Mark the mailing that you want the content preview to show and click **Preview**.
- **Analysis**. Mark the campaign for which you want to open the campaign analysis and click **Analysis**.
- **Edit**. Mark the element for which you want to open the edit window and click **Edit...**.

> **Note:** This function only applies to mailings that have not been sent yet.

- **Pause**.
  - **Smart Campaigns**: In the **Smart Campaigns Messages** overview, select messages in status **Sending**. Click **Pause**. Paused mailings can only be restarted in the Smart Campaigns overview of the corresponding client.

    > **Note:** Mailings that have not started yet will only be displayed if the corresponding campaign has a **Wait**- or **A/B test** node with a send date within the selected time period.

  - **Marketing Automation**: In the **Marketing Automation Campaigns** overview, select campaigns in status **Running**. Click **Pause**. Paused Marketing Automation campaigns can only be restarted in the Marketing Automation overview of the corresponding client.

> **Note:** The time period you selected in area 2 will be ignored when filtering Marketing Automation campaigns.

- **Deactivate**. In the **Smart Campaigns Messages** overview, select mailings in status **Activated**. Click **Deactivate**.

  > **Note:** When deactivating a mailing, the complete campaign the mailing belongs to and all of the campaign's mailings will change status to **Activation required**. The campaigns can only be reactivated in the Smart Campaigns overview of the corresponding client.

Integration and interfaces

This section describes Optimizely Campaign's integration options and interfaces. You can find information on how to link your web shop, CRM, web analytics program or product database with Optimizely Campaign. Also, this section explains how to control Optimizely Campaign from an external system.

- Optimizely platform. Supporting the entire digital marketing chain.
- E-Commerce. Link to e-commerce systems.
- Web analytics. Link to web analytics applications.
- CRM. Link to CRM systems.
- Translation interface. Create multilingual mailings.
- Closed-loop Interface. Link to data warehouses.
- File exchange via SCP. Load files onto the Optimizely server via SCP(Secure Copy Protocol).
- Webhooks. Send event data in real time.
- API overview. Access specific information required for integrations.
- REST API. Configure and use the REST API (Optimizely Campaign Developer Guide on Optimizely World).
- SOAP API. Configure and use the SOAP API (Optimizely Campaign Developer Guide on Optimizely World).
- HTTP API. Configure and use the HTTP API (Optimizely Campaign Developer Guide on Optimizely World).
- SMTP API. Control dispatch via SMTP API (Optimizely Campaign Developer Guide on Optimizely World).

Optimizely Platform

Integrate Optimizely Campaign with other features of the Optimizely Digital Experience Platform (DXP) to create customer-centric experiences. For example, use product data from Optimizely Commerce for your mailing campaigns, visitor profiles from Optimizely Visitor

Intelligence for target groups in Optimizely Campaign, or personalized product recommendations for shopping cart abandoners.

Optimizely Commerce

The Optimizely Commerce integration lets you import the latest product data into Campaign, and make catalog content available when adding product recommendations to mailings. The content interface paragraph imports product data such as offer texts and product images, from your e-commerce system into the Template Kit.

To get the product data into Optimizely Campaign, you set up a periodic transfer of the latest product data from Optimizely Commerce. For more information, see Commerce-Campaign integration on Optimizely World.

Optimizely Connect for Campaign

With this extension, you can connect Optimizely Campaign with Optimizely CMS and Optimizely Forms, to collect visitor data entered in website forms, and pass that on to be used in mailings. For more information, see Connect for Campaign on Optimizely World.

Optimizely Visitor Intelligence

Optimizely Visitor Intelligence is a user interface for viewing and filtering visitor profiles, and creating customer segments that you can use in your omnichannel marketing campaigns. The Optimizely Visitor Intelligence information is based on tracking of online visitor behavior, such as viewing content or products. For more information, see Optimizely Visitor Intelligence on Optimizely World.

Optimizely Email Product Recommendations and Triggered Messages

You can use Optimizely Email Product Recommendations and Triggered Messages to create triggers for sending automated personalized emails through Optimizely Campaign. These transactional mails are initiated by on-site actions of an email recipient, for example abandoning a shopping cart on an e-commerce site. For more information, see Personalization on Optimizely World.

E-commerce integrations

This topic gives an overview of e-commerce integrations with Optimizely Campaign. You can synchronize recipient data and import product data directly into your message template, using the power of Optimizely's sending infrastructure. Registration of new recipients and management of your product data are carried out as usual in your e-commerce system. Data is synchronized automatically and imported into your Optimizely Campaign client, making it easy to manage cross- and up-selling offers in mailings, or to design remarketing campaigns with personalized recommendations.

See the **E-commerce integration guide** for an introduction to working with Optimizely Campaign and e-commerce systems.

Optimizely Commerce

Manage product content and discounts from one user interface, and import catalog content into Optimizely Campaign. With the Campaign-Commerce integration you can import the latest product data into Optimizely Campaign, and access catalog content when adding product recommendations to mailings. See Optimizely platform.

Other e-commerce systems

Integration	Magento 1	Magento 2	Shopware	Spryker
Recipient management via Optimizely Campaign	✓	✓	✓	✗
Recipient status synchronization	✓	✓	✓	✗
Product data import	✓	✓	✓	✗
Opt-in process via Optimizely Campaign	✓	✓	✓	✓

Integration	Magento 1	Magento 2	Shopware	Spryker
Unsubscribe management via Optimizely Campaign	✓	✓	✓	✓
Transactional mails via Optimizely Campaign	✓	✓	✓	✓
	Setup	**Setup**	Setup	**Setup**

E-commerce integration guide

This section provides an introduction to working with Optimizely Campaign, and integrations with e-commerce systems.

Using Optimizely Campaign, you can register advertising consents for receiving newsletters in your e-commerce system, send transactional mails, and import product data and use it for mailings.

- **Opt-in management**. Incoming newsletter registrations in the web shop are processed via Optimizely Campaign. Optimizely Campaign handles the opt-in and opt-out processes, and the dispatch of confirmation e-mails.
- **Transactional mails**. Optimizely Campaign provides API operations for sending individual emails (order confirmations, registrations, and so on). For this purpose, separate transaction recipient lists are created, whose structure and fields you can define. You benefit from the increased delivery rates when sending via Optimizely Campaign and you can design the transactional mails in Optimizely Campaign yourself.
- **Product data import**. Transfer the product catalog of your web shop via content interface into Optimizely Campaign including images, links and prices. When creating a newsletter, you can simply insert this product data into the mailing.

Using the HTTP API

Optimizely Campaign's HTTP API provides all the functionality needed to manage opt-ins and send transactional mails. You can trigger double opt-in processes, uptdate data in a recipient list, remove a recipient from a list and send transactional mails.

© Optimizely 2022

Clients and recipient lists

An Optimizely Campaign client can contain one or more recipient lists which you use to store recipient data and for transactional mails.

> **Note:** Contact customer support for the setup and configuration of recipient lists.

You can use the HTTP API to manage recipients; add recipient data to a recipient list, update and remove recipients from the list. You can retrieve values of the recipient list fields, such as first name and last name, using field functions and use them in mailings. You can use field functions to personalize your mailings; *Hello { salutation} {surname}* becomes for example *Hello Mrs. Miller*.

In addition to recipient lists, a client can contain mailing templates which are used for the mailing design. A client is also used to handle opt-in and opt-out processes.

Accessing the HTTP API

You access the HTTP API via the endpoint `api.campaign.episerver.net/`. In the developer documentation of the HTTP API on Optimizely World, in the **Basics** section under **Formatting rules**, you can find information about the valid number and date formats.

You usually request the API with a program or via a program library such as cURL. For testing, you can also enter the API request directly in the address line of your web browser. You use the POST method to send data and the GET method to retrieve data.

A complete API request has the following structure:

```
https://api.campaign.episerver.net/http/[Service]/[AuthorizationCode]/
[Operation]?[Parameter]
```

- **Service**. Use the *form* and *mail* services to connect shop systems and manage profile data. See Services and operations on Optimizely World.
- **AuthorizationCode**. Use the authorization code to authorize access to the API and the recipient list associated with the code. To see the authorization codes of your recipient lists, open the Optimizely Campaign menu and select **Administration** > **API Overview** > **Recipient lists**.

- **Operation**. Specify which action the API request should trigger. For example, *subscribe* is used to make a subscription and trigger an opt-in process. With *sendtransactionmail* you send a transactional mail.
- **Parameter**. You must specify the parameters of the API request correctly. Besides the parameters that are mandatory for the operation, such as *bmRecipientId* for the *subscribe* operation, you can also specify the names of recipient list fields, for example *last-name=Meier*.

> **Tip:** The HTTP API uses ISO-8859-1 encoding by default. You can change the encoding by assigning the value *utf-8* to the *bmEn-coding* parameter.

For testing you can use the *nop* operation. The *nop* operation only accepts parameters, but does not perform any action. You can use the following request to test the network connection between the shop or test system and Optimizely Campaign:

```
https://ap-
i.cam-
paign.epi-
server.net/http/form/1234567890/nop?parameter=wert&bmEncoding=utf-8
```

Information in the API overview

You can find the information required to use the HTTP API in the API overview.

- **Recipient list ID**. Open the Optimizely Campaign menu and select **Administration** > **API Overview** > **Recipient lists**.
- **AuthorizationCode**. Open the menu and select **Administration** > **API Overview** > **Recip-ient lists**. Select a recipient list and click **Manage authorization codes**.
- **Client ID**. Open the menu and select **Administration** > **API Overview** > **REST API**.
- **Opt-In-Prozess-ID (bmOptinId)**. Open the menu and select **Administration** > **API Over-view** > **Opt-in processes**.

Managing opt-ins

Let your customers subscribe for or unsubscribe of newsletters in your web shop. The data, which includes not only the email address but also other customer data such as name, address or areas of interest, is written in fields of the Optimizely Campaign recipient list. You can update this data afterwards.

Your shop system is considered the leading system that collects the data and forwards it to Optimizely Campaign. In the case of opt-in and opt-out processes, you must ensure that the customer is logged in or out of the web shop after clicking the respective confirmation link. This is done, for example, via a confirmation page, which you use to process an additional recipient ID parameter.

Structure of the recipient list

To adjust the structure of the recipient lists in Optimizely Campaign, you define in advance which user data from your shop system should be synchronized with Optimizely Campaign. Contact customer support to configure the recipient list so that the names of the recipient list fields conform to Optimizely conventions.

In addition to the email address and the personal data, the recipient list must contain an ID field to identify the data record in the shop system. You should ideally use a coded hash value.

Specify the *bmOptinSource* field, which indicates the source of the opt-in. Enter a string such as *ShopSystem/ShopName/Version*, for example *WebShop/Shoe Shop/1.1.2*.

Overview of the opt-in process

If a customer is to register for a newsletter from the shop system, the opt-in process consists of the following steps:

1. Your shop system requests the Optimizely Campaign HTTP API and initiates the opt-in process. In addition to the email address, an ID is also transferred to identify the data record in the web shop.
2. Optimizely Campaign sends the recipient an email requesting to confirm the registration by clicking a confirmation link.
3. The recipient clicks on the confirmation link.
4. Optimizely Campaign registers the confirmation and the recipient appears in the opt-in recipient list.

© Optimizely 2022

5. Optimizely Campaign redirects the recipient via HTTP forwarding to the web shop and adds the parameter used to identify the data record in the web shop to the URL; for example *https://www.example.com/newsletter/success?id=781278TZ*.

> **Note:** You must provide the URL of the confirmation page for the opt-in process in Optimizely Campaign in advance.

6. The integration in the web shop accepts the request under */newsletter/success* and accesses the value of the *id* parameter. Using the value *781278TZ*, the customer record is identified and added to the newsletter recipients in the shop system.

> **Note:** You must generate and temporarily store the ID for identifying the customer data record in the shop system. This ID is stored in the Optimizely Campaign recipient list.

Initial recipient data transfer and start of the opt-in process

To add a recipient to a recipient list and initiate an opt-in process, the API operation *subscribe* is requested with the parameters *bmRecipientId* and *bmOptInId*. Furthermore, the *bmOptinSource* field should be specified with the source of the opt-in, for example *WebShop/Shoe Store/1.1.2*. The *customer-id* field contains the ID of the customer record.

You can append other fields from the recipient list as parameters and use them to personalize the mailing, for example, *salutation*, *firstname* and *lastname*.

Sample HTTP request:

https://api.campaign.episerver.net/http/form/[AuthorizationCode]/subscribe?bmRecipientId=abc@example.com&bmOptInId=987654321&customer-id=1234ABCD&salutation=Mr.&firstname=John&lastname=Smith&bmOptinSource=WebShop/ShoeStore/1.1.2

The *bmRecipientId* parameter is the primary key of the recipient list (usually the email address). The *bmOptInId* parameter specifies the opt-in process to be triggered. The opt-in process contains the mailing for registration confirmation configured in the client and the URL of the confirmation page to which the recipient is forwarded.

Confirmation link and confirmation page

You must include a confirmation link in the opt-in mailing as field function `{Double-Opt-In-Link}`. See Opt-in processes.

The field function is converted to an individual confirmation link of the recipient and the *customer-id* parameter is added: `{Double-Opt-In-Link}?customer-id={customer-id}`.

> **Tip:** The *customer-id* parameter contains the respective value of the opt-in recipient list.

When the mailing recipient clicks on the confirmation link, the recipient is redirected to the provided confirmation page: *https://www.example-shop.-com/newsletter/success?customer-id=8122*.

You must configure the integration in the shop system in such a way that when the */news-letter/success* path is requested, the value of the *customer-id* parameter is read and used further within the shop system.

You can add further parameters to the confirmation link, as long as your recipient list contains the respective fields. For example, if your recipient list contains the field *shop-id*, you can add the *shop-id* parameter to the confirmation link: `{Double-Opt-In-Link}?-customer-id={customer-id}&shop-id={shop-id}`.

Unsubscribe link and confirmation page

While you can create several opt-in processes in one client, only one unsubscribe link is configured per client.

The unsubscribe link is placed in a proper place in the mailing (for example in the footer) so that the recipient can unsubscribe from the newsletter with just one click.

Like the confirmation link, the unsubscribe link first redirects the recipient to Optimizely Campaign to register the unsubscription. The recipient is then redirected to a confirmation page. To add or change the URL of the confirmation page, see **Changing the confirmation page URL**.

You can also add further parameters to the unsubscribe link if your recipient list contains respective fields: *https://www.example.com/newsletter/unsubscribe?customer-id={customer-id}&shop-id={shop-id}*.

You have to configure the integration in your shop system in such a way that a request for the path */newsletter/unsubscribe* results in a unsubscription of the recipient *customer-id*. Depending on the system, you can also use the *shop-id* parameter to address a specific web shop or subpage. Both *customer-id* and *shop-id* are already known to the shop system, since both values were written to the recipient list by the shop system when the recipient logged on.

Updating customer data

If a customer changes his or her data in the web shop (for example, address or telephone number), you can update the fields in the recipient list using the HTTP API request *updatefields*. The email address is used as the primary key for identification (*bmRecipientId* parameter): *https://api.campaign.episerver.net/http/form/[AuthorizationCode]/updatefields?bmRecipientId=abc@example.com&city=Boston&zip=02108*.

With the API request you change the values of the recipient list fields *city* and *zip* to *Boston* and *02108* for the recipient *abc@example.com*.

Removing recipients from a recipient list

If a recipient unsubscribes a newsletter from within your web shop, for example via a link or a checkbox, you can register this unsubscription in Optimizely Campaign using the *unsubscribe* operation: *https://api.campaign.episerver.net/http/form/[AuthorizationCode]/unsubscribe?bmRecipientId=abc@example.com*.

The *bmRecipientId* parameter uniquely identifies the recipient by his or her email address and the API request unsubscribes the recipient from the newsletter. The recipient is entered in a separate unsubscribe list and is no longer contacted. See **Unsubscribers**.

Sending transactional mails

You can send transactional mails using the HTTP API operation *sentransactionmail*. The recipient's email address is specified with the *bmrecipientId* parameter and the transactional mail to be sent is defined with the *bmMailingId* parameter.

> **Tip:** To see the mailing ID, open the Optimizely Campaign menu and select > **Campaigns** > **Transactional Mails**.

You can also add additional parameters for salutation, first and last name, web shop and language of the recipient: *https://ap-*
i.cam-
paign.epi-
serv-
er.net/ht-
tp/-
form/1234ABC/sendtrans-
action-
mail?b-
mRe-
cipi-
entId-
=abc@example-
.com&b-
mMail-
ingId-
=1234567&s-
salutation=Mr.&firstname=John&lastname=Smith&shopname=ShoeStore&language=en.

If you use the operation *onlineversion* instead of *sendtransactionmail*, you can open the transactional mail directly in the browser. This resolves all field functions. You can use this operation to test the encoding of the values and the design of the mailing without sending yourself an email for each test.

Using field functions

When sending transactional mails, personalized mailing content is transferred to the transaction recipient list using the parameters of the HTTP request and inserted at the respective position in the mailing using field functions.

Text with field functions:

Hello {salutation} {firstname} {lastname}, thank you for your registration in our web shop {shopname} on {registerdate}.

Text with personalized content:

Hello Mr. John Smith, thank you for your registration in our web shop ShoeStore on 2022-01-01.

The field function *{registerdate}* reads the value of the field *Registration time* and specifies it in the mailing without time.

Importing product data

Using the content interface, you can import the product catalog of your web shop directly into Optimizely Campaign. The products contained in the catalog are available when you create a mailing. In addition to the product name, you can also insert images, links, prices, and descriptions directly into the mailing. The product data import is usually done via a predefined CSV file, which is transferred daily via SFTP to the Optimizely Campaign server.

SFTP data transfer

The SFTP protocol is used for data transfer. To transfer data, you must connect to the Optimizely Campaign server using an authentication key. The shop integration must therefore support working with authentication keys. See **Transferring files through SCP**.

If you have a PHP-based shop system, you can for example use the phpseclib library (http://phpseclib.sourceforge.net/).

Provide customer support with the file name so they can configure the respective imports in your client.

> **Tip:** Create the folder structure based on client IDs. So you can connect a shop installation on which different web shops with different languages have been configured, using a SFTP account.

Structure of the CSV file

The CSV file has the following defined header structure:

```
"id";"-
name";"c-
ategory";"-
tex-
t1";"-
tex-
t2";"-
tex-
t3";"-
tex-
t4";"-
tex-
t5";"-
tex-
t6";"-
tex-
t7";"-
tex-
t8";"-
tex-
t9";"-
tex-
t10";"link1Tex-
t";"link1Url";"link2Tex-
t";"link2Url";"link3Tex-
t";"link3Url";"im-
age1ImageUrl";"im-
age1AltTex-
t";"im-
age1Link";"im-
age2ImageUrl";"im-
age2AltTex-
t";"im-
age2Link";"im-
age3ImageUrl";"im-
age3AltTex-
t";"im-
age3Link";"im-
age4ImageUrl";"im-
age4AltTex-
```

© Optimizely 2022

```
t";"im-
age4Link";"im-
age5ImageUrl";"im-
age5AltTex-
t";"im-
age5Link";"im-
age6ImageUrl";"im-
age6AltTex-
t";"im-
age6Link";"ad-
dition-
alData1";"ad-
dition-
alData2";"ad-
dition-
alData3";"ad-
dition-
alData4";"ad-
dition-
alData5";"ad-
dition-
alData6";"ad-
dition-
alData7";"ad-
dition-
alData8";"ad-
dition-
alData9";"ad-
dition-
alData10";"ad-
dition-
alData11";"ad-
dition-
alData12";"ad-
dition-
alData13";"ad-
dition-
alData14";"ad-
dition-
alData15";"ad-
dition-
alData16";"ad-
ditionalData17";"additionalData18";"additionalData19";"additionalData20"
```

Each product is written in one line. Columns for which no values are available in the shop system must still be empty and cannot be deleted. Also note the following information:

- The columns *id*, *name* and *category* must be specified.
- The value of the *id* column must be unique in the CSV file and identify the product.
- In the *category* column, specify the category as a string and separate the hierarchies with *#*, for example *men#shoes#summer*.

- Select UTF-8 as text encoding.
- Remove HTML code or make sure that the HTML code is error-free.

Magento 1 integration

> **Note:** The Magento 1 integration is no longer supported with updates. Updates will only be made for the Magento 2 integration.

> **Note:** This topic is for administrators and developers with administration access rights in Magento 1.

If you are using Magento 1 as e-commerce platform, you can integrate this with Optimizely Campaign and manage customer data via Optimizely's email marketing platform. The entire recipient management, from registration to the opt-in process through to updating of the recipient data and unsubscriptions, is done in Optimizely Campaign. The Magento 1 integration allows for sending of transactional mails and regular email campaigns via Optimizely's server. You can also import product data into Optimizely Campaign to display products in remarketing campaigns and recommendations.

Supported versions

Magento CE		Magento EE	
1.7	✓	1.12	✓
1.8	✓	1.13	✓
1.9	✓	1.14	✓

Installation

The installation should be carried out by an administrator or Dev operator. For the integration, you need to install the Optimizely Campaign extension in Magento. You need at least **PHP 5.3** and **phpseclib 0.3.6** on your Magento server (the official distribution from Version 0.3.6.). You can install this via PEAR: http://phpseclib.sourceforge.net/pear.htm.

Install the Optimizely Campaign extension via the file system. You need an FTP connection to your server to transfer the installation package.

1. Unpack the ZIP archive containing the installation onto your local PC.
2. Establish an FTP connection to your Magento server.
3. Copy the **app** folder to your Magento server.

> **Note:** Test the installation and configuration first in a non-production (live) environment.

Configuring in Optimizely Campaign

When setting up your Optimizely Campaign extension, certain data should be available for the configuration. If you are operating several store views, stores and/or websites with a Magento installation, see Configuring multiple-clients.

Log in to your Optimizely Campaign client and select the required client. Copy the following IDs and codes:

- **Client ID**. Open the Optimizely Campaign menu and select **Administration** > **API Overview** > **REST API**.
- **Authorization code**. Open the Optimizely Campaign menu and select **Administration** > **API Overview** > **Recipient lists**. Select the required recipient list and click **Manage authorization codes**. If no code is set up for the selected list, click **Create authorization code**.
- **Opt-in ID**. Open the Optimizely Campaign menu and select **Administration** > **API Overview** > **Opt-in processes**. Select the opt-in process that you want to use for the Magento store (see following section).
- **Opt-in link**. Edit the system mailing you are using for the registration confirmation (opt-in) of customers from your Magento shop and replace the default field function for the opt-in link: `{Double-Opt-In-Link}` with the parameterized string: `{Double-Opt-In-Link}?id={bmecssid}&code={bmecsscc}`

Customer support will further configure in Optimizely Campaign. Optimizely needs the following information from your Magento shop:

- **The IP address of your Magento shop**. This is stored in your client.
- **Forwarding email address**. Should be an administrative email address to where ARF reports, bounces, spam, auto-replies and responses are sent.
- **The transmission domain of your shop**. Must be delegated to Optimizely and stored in your client as a transmission domain.

Importing recipient data

When setting up the integration, customer support sets up a recipient list with the standard fields from Magento in your Optimizely Campaign client. The recipient list contains the following fields:

Field name	Data type	Description
email	String	Email address
salutation	String	User's title
firstname	String	First name
lastname	String	Last name
language	String	ISO code for the language from the StoreView via which the user has registered.
street	String	Street address
zip	String	Postcode or international ZIP code
city	String	City
state	String	State
country	String	Country

© Optimizely 2022

Apart from the mandatory email address and automatic language, fields are optional. To receive the data, create an expanded subscription form or an edit-profile form and integrate this into your shop pages.

Adding and exporting additional recipient data fields

In Magento, you can add recipient data called customer attributes to save with the default recipient data and export the data to Optimizely Campaign. Customer attributes let you adapt your sales approach. You can use customer attributes like any other default value to personalize newsletters or to create highly customized customer segments.

> **Note:** The function to add customer attributes (steps 1-7) is not available in Magento Community Edition. Instead, there are third-party extensions available that add this functionality to the browser.

1. Select **Customers** > **Attributes** > **Manage Customer Attributes**.
2. Click **Add New Attribute** and define first the **Attribute Properties**.
3. In the field **Attribute Code**, enter a unique internal name.
4. In the **Input Type** drop-down list, select the desired data type.

   > **Note:** The export to Optimizely Campaign only supports the field types *Text Field*, *Text Area*, *Date* and *Yes/No*.

5. Define the further settings for the customer attribute.
6. Click the **Manage Label/Options** tab and define the titles for the customer attribute, as you want them to be displayed in the admin back end and in the different languages of your shop. You must enter a title in the **Admin** field. If you leave the other fields empty, the **Admin** value is used for them as a default value.
7. Click **Save Attribute**.
8. Select **System** > **Configuration** > **optivo broadmail**.
9. Open the **HTTP-API** panel and, in the the **Customer Attributes to optivo** list, select customer attributes you want to export to Optimizely Campaign. Use CTRL to select multiple attributes.
10. Click **Save Config**. The selected attributes are sent to Optimizely Campaign at every HTTP API request.

11. To process the sent data, communicate the field names and types of the customer attributes to customer support who configure the recipient lists in your Optimizely Campaign client. When this is done, you can access the customer attributes in Optimizely Campaign as a recipient field and can be used to create personalized content or target groups based on these data.

Importing product data into a template

If you are configuring the product data export in Magento, you need a correspondingly equipped message template with a content interface to integrate the imported data into your mailings (for example in the form of recommendations or cross and upselling offers).

> **Note:** An individual template and the content interface are additional functions, subject to a charge, and are not part of the standard scope of supply for the Magento integration. For more information, contact customer support.

The Magento integration transfers the following product data to Optimizely Campaign:

Field name	Data type	Description
id	Long	Product ID
name	String	Product title
category	String	Product category (final path)
description	String	Product description
short_description	String	Short description of the product
sku	String	Item number
product_url	String	URL to product landing page
price	String	Product price

Field name	Data type	Description
special_price	String	Special price
special_from_date	String	Offer valid from
special_to_date	String	Special valid until
base_image	String	Product image
small_image	String	Downsized product image
thumbnail	String	Thumbnail image

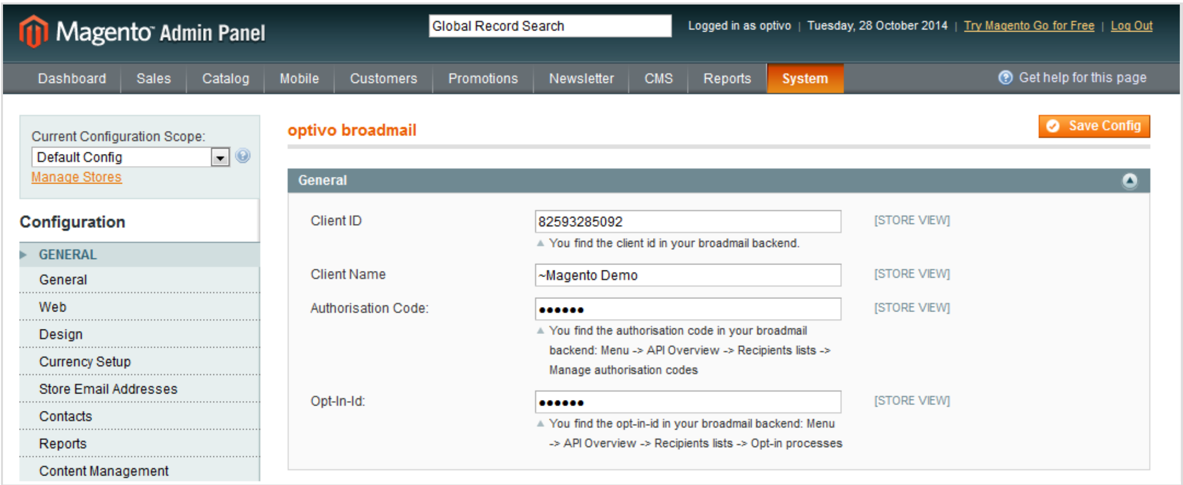
Configuring in Magento

Open the system configuration tool in Magento, then, in the **optivo** menu, select the menu item **optivo broadmail**.

> **Tip:** If a 404 error message (Page not found) appears, log out and log back in again.

General

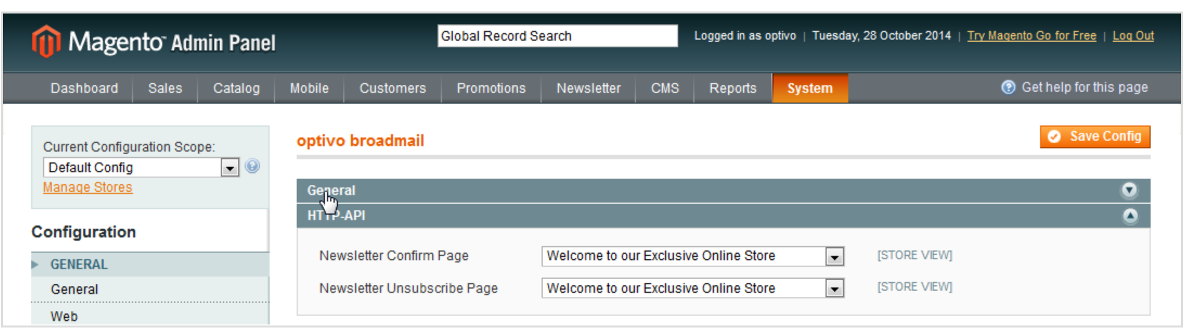
Open the **General** area and complete the fields using the data that you copied from your Optimizely Campaign client in the previous step:



- **Client ID**. Client ID
- **Client Name**. Optionally, enter the name of your Optimizely Campaign client. This is used for orientation purposes, because the client ID can be difficult to remember.
- **Authorization Code**. Authorization code
- **Opt-in ID**. Opt-in ID

HTTP API

Open the **HTTP-API** area, enter the confirmation page URL for the double opt-in, and enter the confirmation page URL for the unsubscription process in the second field.



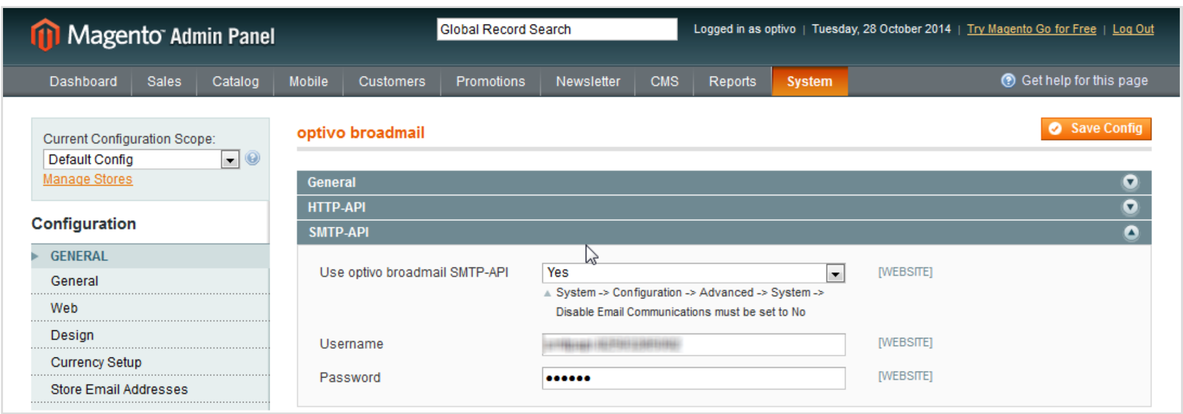
Tip: The CMS page for the confirmation (Newsletter Confirm Page) or unsubscription (Newsletter Unsubscribe Page) can also be a CMS page created specially for this case.

SMTP API

Open the **SMTP-API** area and select whether you want to use the Optimizely Campaign SMTP-API to send transaction mails. If you have select **Yes** here, enter the appropriate data in the following fields:

- **User name of the API user**. Provided by customer support.
- **Password of the API user**. Provided by customer support.

You also have to configure the **Store Email Addresses** in Magento. Open the **Store Email Addresses** menu item and, for the email addresses specified here, specify the domain you have delegated to Optimizely during the SMTP setup.

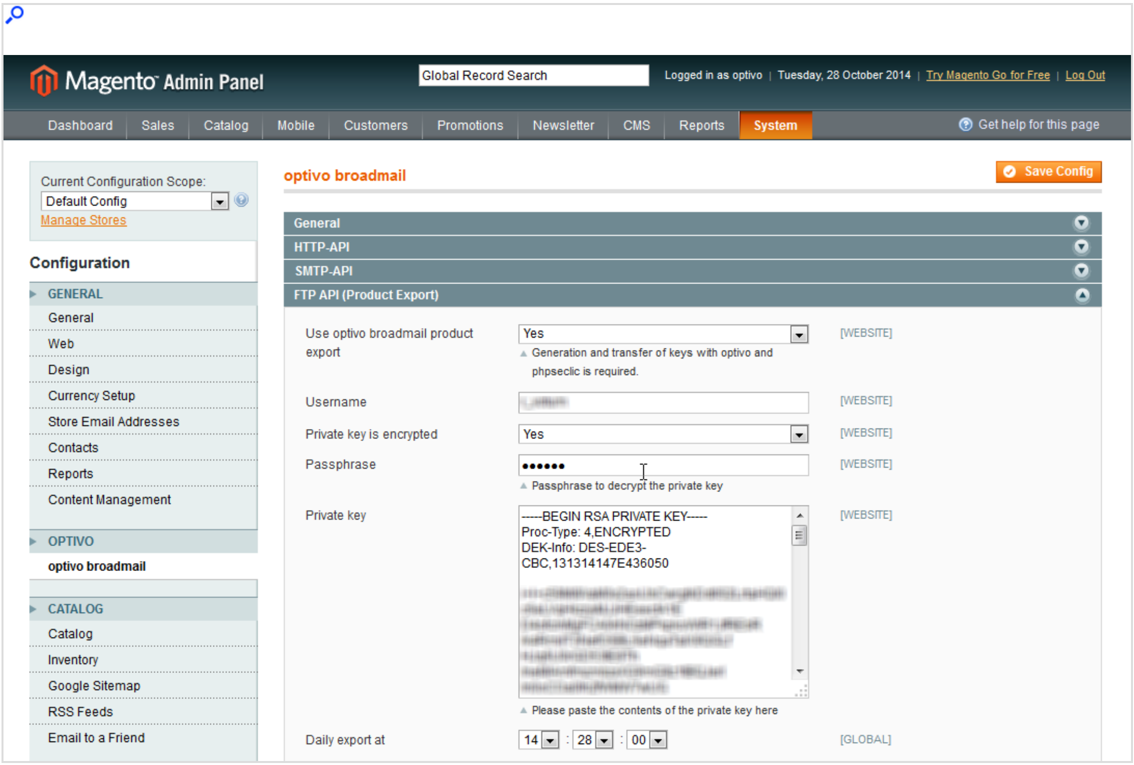


FTP API

Open the **FTP-API (Product Export)** area and select whether you want to activate the product data export as per Optimizely Campaign. If you select **Yes** here, fill in the following data fields with the corresponding information:

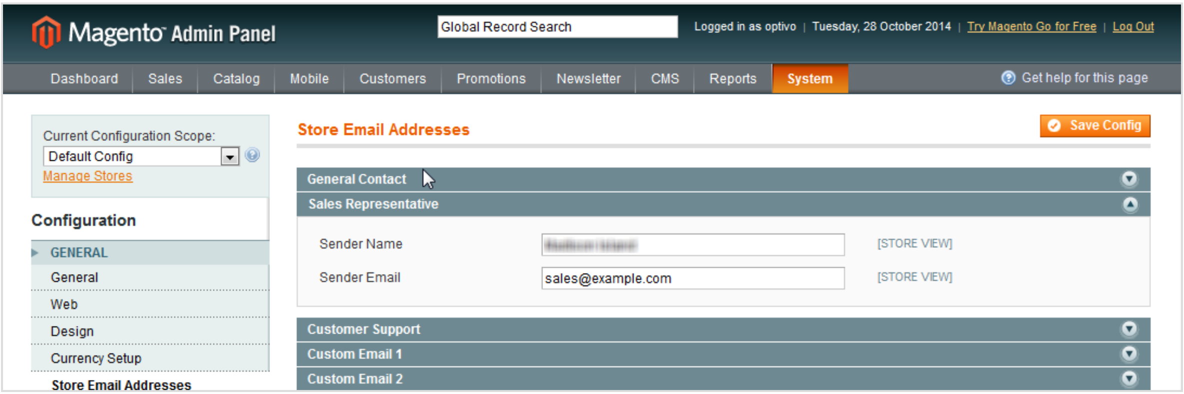
- **User name of the API user**. This is provided by customer support.
- **Private key is encrypted**. Select **Yes** from the list of options.
- **Private key**. A key pair must be generated for data exchange via SFTP. See FTP access via SCP. Enter the private key here and inform Optimizely of the public key.

- **Daily Export at**. Select the time at which the daily product data export should take place.



Transactional mail address

In the System configuration, in the **General** menu, select the **Store email addresses** menu item. Open the mailing address that you want to use for your transactional mails via Optimizely Campaign and enter a sender name and a sender address. The mailing address **Sales representative** is used as standard for transactional mails (for example, order confirmations). You can also configure a different mailing address (such as *Adapted email 1*). To store this mailing address for transactional mails, go to the **Sales emails** menu item in the **Sales** area, and select the corresponding mailing address for each sales campaign.



Note: The transmission domain for the transactional mails must be delegated to Optimizely and also be stored in your Optimizely Campaign client as a transmission domain. The administration of the delegated domains is carried out by Optimizely. Do not use your shop's main domain (example.com), but instead set up a subdomain for transactional mails (transactions.example.com) and delegate this subdomain.

Configuring transactional mails

You can configure and send a transactional mail for shop actions (orders, shipments, changes to customer and shipping data and so on) using Optimizely Campaign. Adjust or set up corresponding templates in your Magento shop to do this. To create a template:

1. Select **System** > **Transactional mails**. Transactional mail templates are now displayed in a table.

   Note: The **Template Type** column shows whether a template is configured for sending using the Magento shop (template type: HTML) or using Optimizely Campaign (template type: optivo). You can change the template type so that templates, that are configured for sending via the Magento shop, are sent using Optimizely Campaign. To do so, go to step 6.

2. Click **Insert New Template** and from the **Load default template** area, select a template; empty templates cannot be created with Magento.
3. Select an area schema from the list below. This schema determines the formatting of prices and dates.
4. Click **Load template** to copy the content.
5. In **Template Information**, enter a name for the template. This name is only used internally.
6. Select the **send with optivo broadmail** check box. The two new fields **optivo authcode** and **optivo bmmailid** are now displayed.
7. In **optivo authcode**, enter the authorization code for the recipient list that should be used for the transactional mail.

    a. Open the Optimizely Campaign menu and select **Administration** > **API Overview** > **Recipient lists**.
    b. Select the required recipient list and click **Manage authorization codes**. A new window opens that displays a list of authorization codes for the selected recipient list.
    c. Copy the ID of the desired authorization code and enter it into the corresponding field in Magento. If no authorization code is currently available, click **Create authorization code** to generate a new code.

8. In **optivo bmmailid**, enter the ID of the transactional mail in Optimizely Campaign that you want to send with this transaction. The transactional mail must be set up in your Optimizely Campaign client beforehand; see Transactional mails.
9. Remove the HTML code from the **Template content** field.
10. Enter recipient parameters to transfer with this template to Optimizely Campaign using the following format:

```
[parameter]={{var order.getOptivoBillingData('[variable]')}}
```

> **Note:** Replace the string [parameter] with the name of the parameter in Optimizely Campaign, and replace the string [variable] with the name of the variable used by Magento for the order object. For example, the line `lastname={{var order.getOptivoBillingData('lastname')}}` sends the last name of the recipient to Optimizely Campaign. See Recipient and billing

> data for a list of recipient parameters.

11. To add a parameter, start a new line.
12. In addition to the variables provided by the function `getOptivoBillingData`, you can also send the shop-specific standard variables to Optimizely Campaign to use them in the transactional mail. Use the following format to do this:

```
[parameter]=[variable]
```

> **Note:** For each variable to be transferred, a corresponding field [parameter] is required in the target recipient list in Optimizely Campaign. To insert a variable, click **Insert Variable...** and select the desired variable from the list. For example, the line: `resetPassword={{htmlescape var=$customer.password}}` sends a new password to the `resetPassword` field. This lets you send a transactional mail to a recipient who has requested a new password.

13. Likewise, enter order items that you want to send with this template to Optimizely Campaign using the following format:

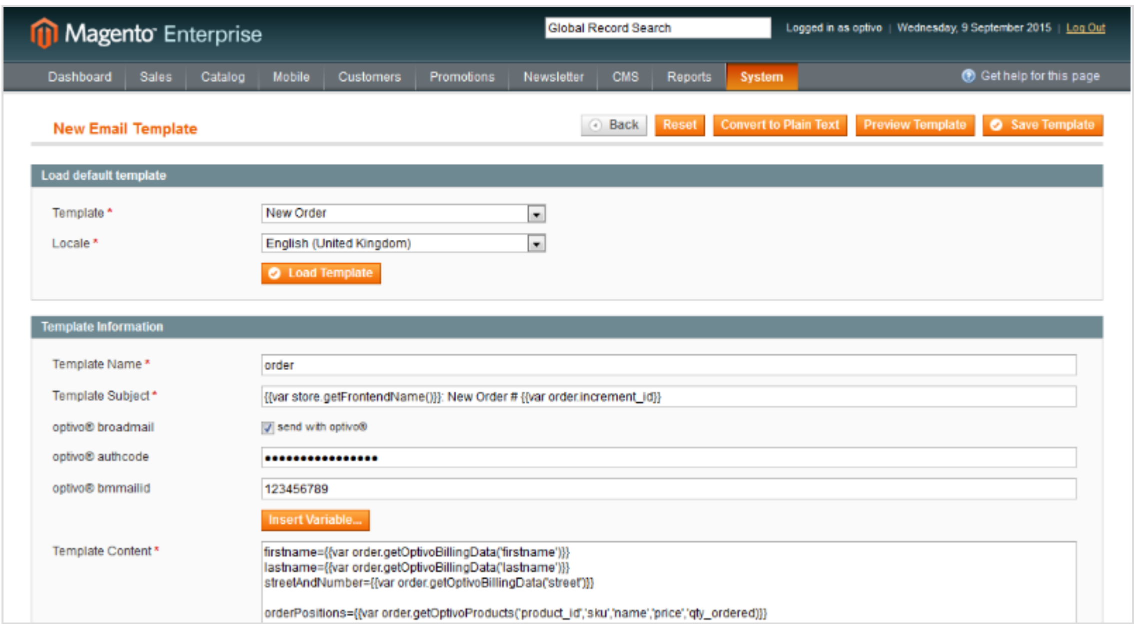
```
orderPositions={{var order.getOptivoProducts('product_
id','sku','name','price','qty_ordered)}}
```

The five standard parameters (*product ID*, *order number*, *name*, *price* and *quantity*) are sent using the above format. If you do not require one of these parameters, you can remove it from the schema. If you want to send additional order parameters, you need to program a custom template. See Order details for a list of available order parameters and notes about templates.

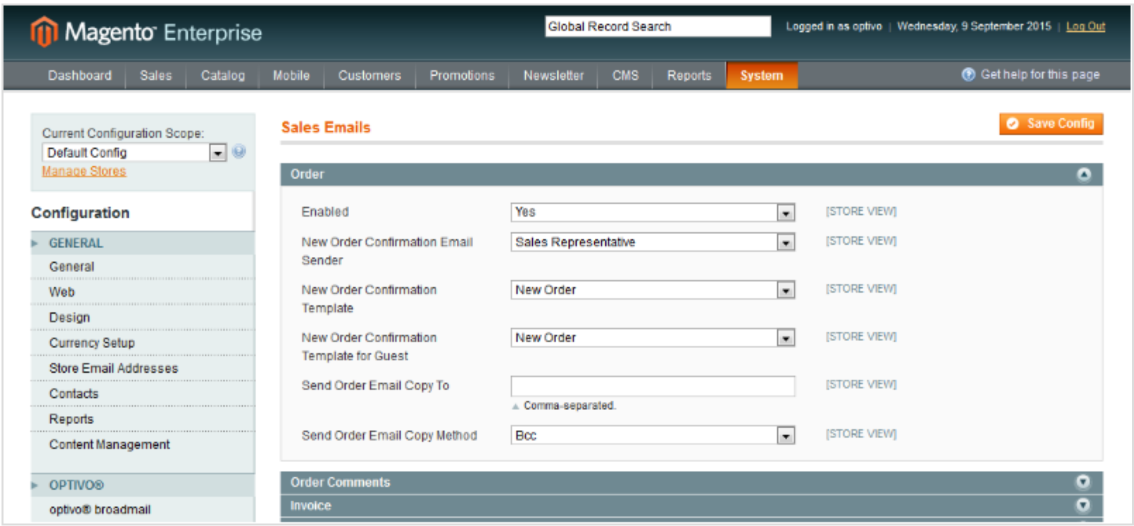
> **Note:** To carry out the programming, you need PHP knowledge and knowledge of the Magento object model.

14. Click **Save Template**.

> **Note:** The template is not activated when saved; that is, no transactional mails are sent using it.



15. To activate the template and link it to an action, select **System** > **Configuration**.
16. Locate the **Sales** section in the menu on the left and click **Sales Emails**. This displays actions that trigger a transactional mail to be sent.
17. Open the panel for the desired action and select the desired template from the drop-down list (there is a template for each registered user and guest).



Configuring multiple clients

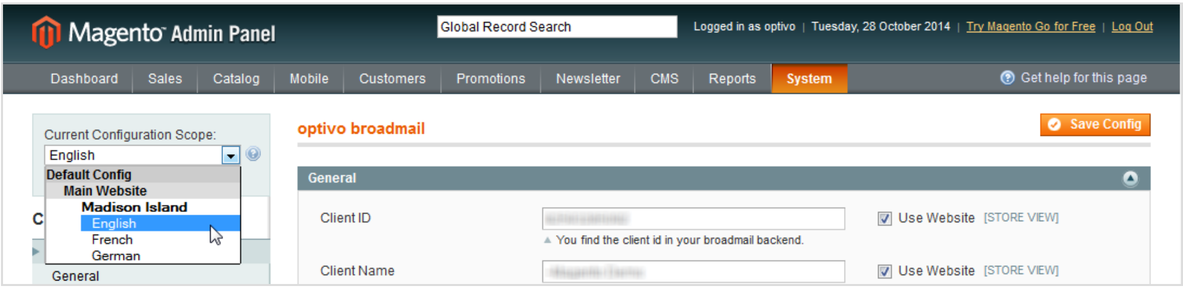
Magento and Optimizely Campaign provide the option of displaying multiple clients. Configure each individual client exactly as described in the configuration sections. Ensure that the clients are allocated correctly in Optimizely Campaign and Magento.

For each client, you need the client ID, client name, authorization code and opt-in ID. You can configure the confirmation pages for the opt-in and the unsubscription confirmation separately for each client, or you can use the same URLs for clients. The configuration for the SMTP-API and the FTP-API is global, and only needs to be carried out once.

> **Note:** To ensure that the clients are correctly allocated in Optimizely Campaign and Magento, contact customer support to help you with the configuration.

Selecting a client in Magento

Clients are depicted in Magento via websites, stores and store views. See User Guide from Magento. The client selection section is at the top left-hand side of the configuration.



Integrating the subscription form

Subscription to your newsletter is performed via the online registration form on your shop pages. The registration data is transferred to Optimizely Campaign by means of an HTTP request. The standard template for the subscription form can be integrated onto any CMS page. Connection to Optimizely Campaign is automatic when you are using the standard template. For standard newsletter subscriptions, only the email address is requested in the standard form. Magento also automatically transfers to Optimizely Campaign the language in which new subscribers are registered in the Magento shop. You can use this information to send newsletters in different languages, for example.

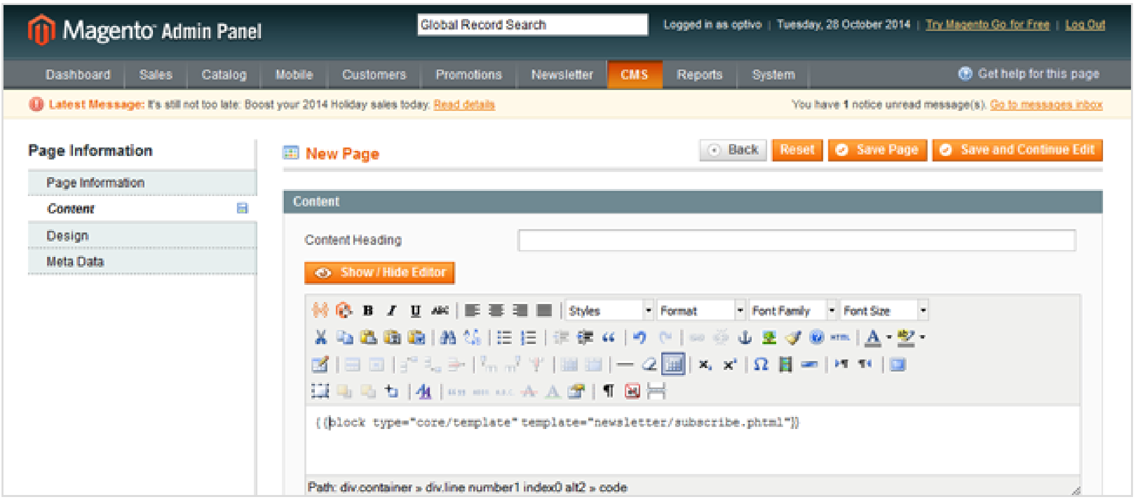
To request additional recipient data, you need an extended subscription form. For this type of form, you need extended programming knowledge in HTML. See Importing recipient data for information about the data that you can request and process with the integration.

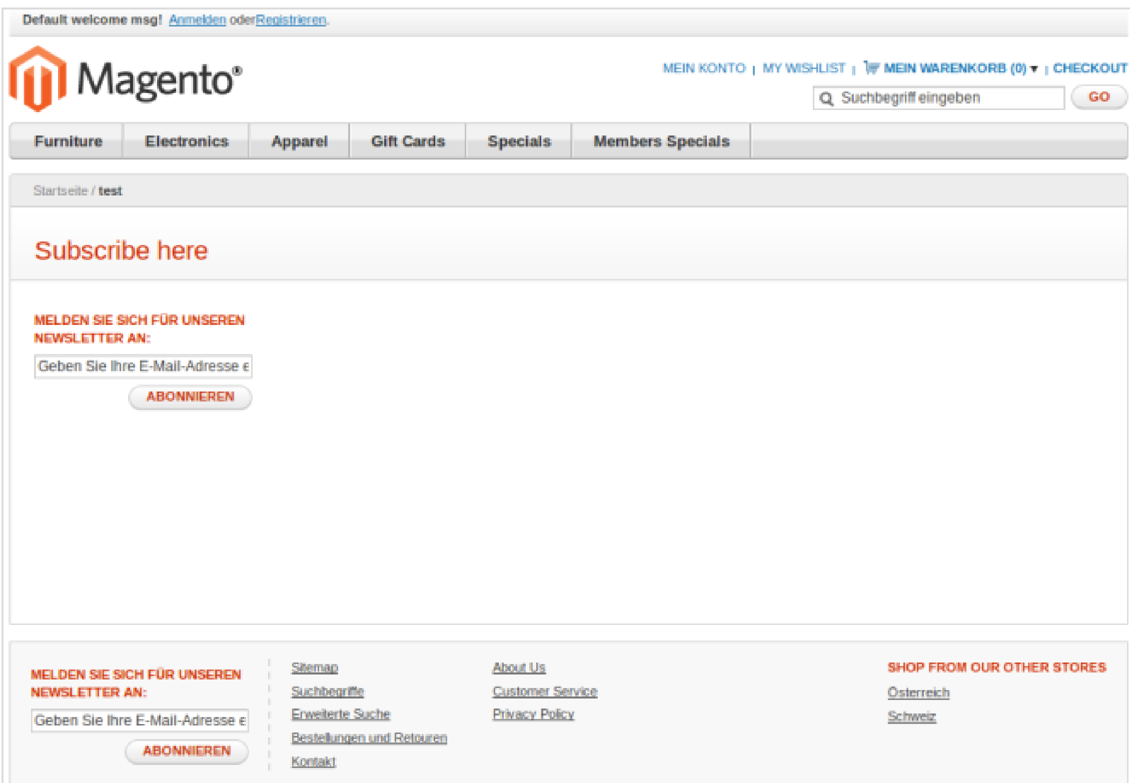
Integrating the subscription form on a CMS page

1. In the top menu bar, go to the **CMS** menu item.
2. In the **Pages** overview, go to the **Manage content** menu item.
3. Select **Add new page** or edit an existing CMS page.
4. In the **Editor** field, enter the following code fragment:

```
{{block type="core/template" template="newsletter/subscribe.phtml"}}
```

5. Click **Save**, or **Publish**.





Integrating the subscription form on category pages

1. In the top menu bar, go to the **Catalog** menu item.
2. In the **Categories** overview, go to the **Manage categories** menu item.
3. Select the required category and a client (optional), and go to the **Own design** tab.
4. Enter the following code fragment in the **Editor** field. Your subscription may have a different column layout and positioning, so adjust accordingly.

   ```
   <!-- Newsletter Box -->
   <reference name="right">
   <block type="newsletter/subscribe"
   name="right.newsletter"
   template="newsletter/subscribe.phtml"/>
   </reference>
   ```

   This code fragment integrates the subscription form into the right-hand layout column. If you want to integrate the newsletter into the left-hand column, replace the tag

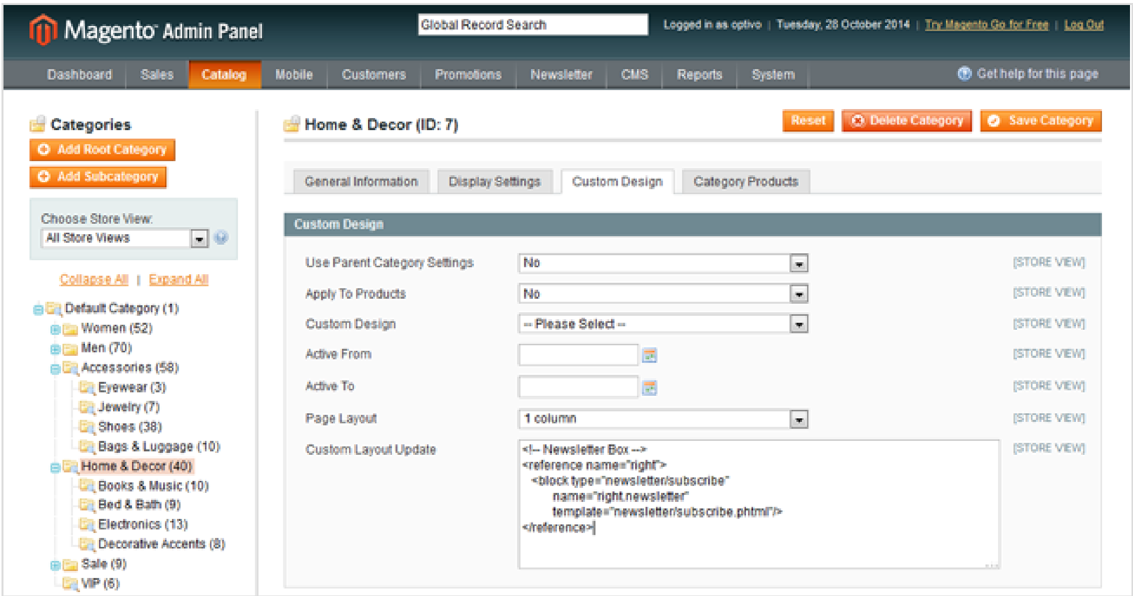
   `<reference name="right">` with the tag `<reference name="left">`

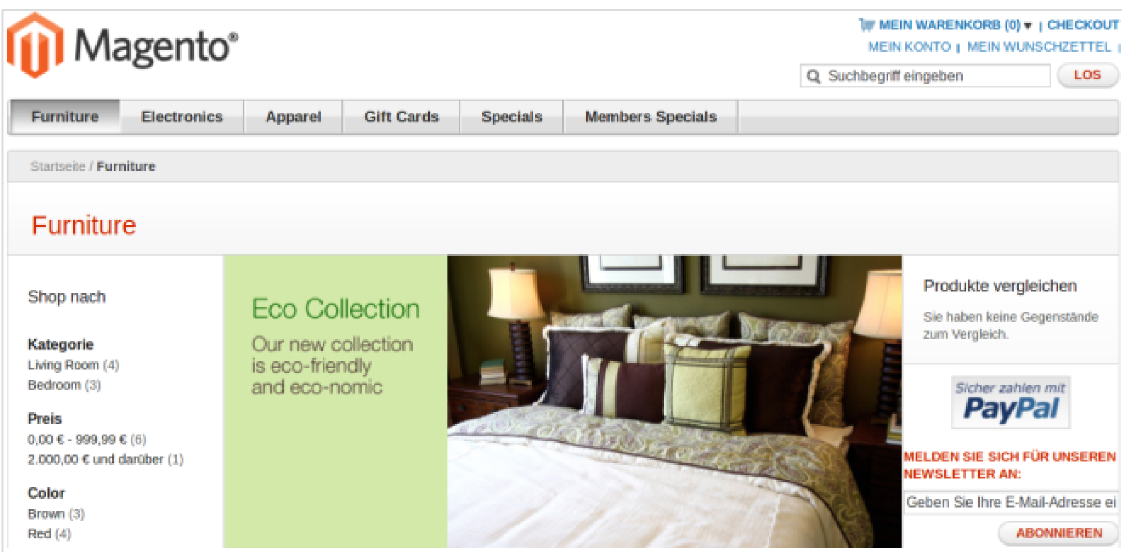
   and replace the attribute `name="right.newsletter"` with `name="left.newsletter"`.

   Depending on the integration and to ensure a correct display on different end devices, you also may make changes in CSS.

© Optimizely 2022

5. Click **Save**, or **Publish**.





Note: Additional integration options

This section listed only the possible integration options from the back-end. The integration can also take place almost everywhere via the Magento template system. These changes require design experience and access to the Magento installation file system.

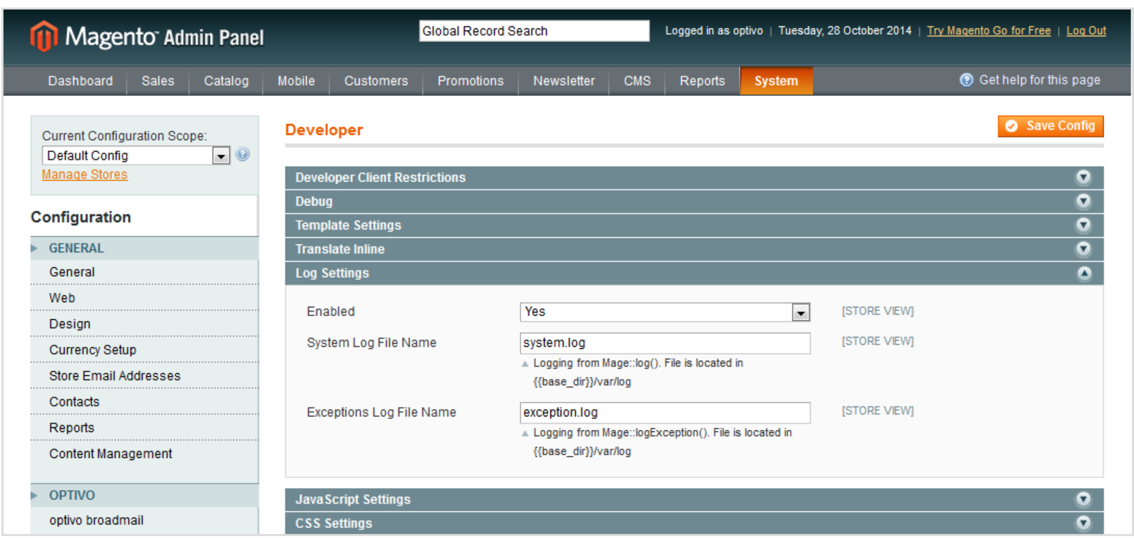
Error handling

Activating Magento logging

By default, general logs are written to the *system.log* file, and errors and exceptions to the *exception.log* file. You can change these file names at `var/log/`.

Activate writing log files in Magento for error analysis.

1. Select **System** > **Configuration**.
2. Click **Progress** and then **Developer**.



3. Set the **Enabled** option to **Yes**.

Activating developer module

To analyze errors and ensure that effective logging is taking place, activate the developer mode in Magento via *.htaccess* or directly in the *index.php* of Magento:

```
if (isset($_SERVER['MAGE_IS_DEVELOPER_MODE'])) {
    Mage::setIsDeveloperMode(true);
}
```

The log file for the Optimizely Campaign extension is located in the `/var/log/` directory within the Magento installation. The name of the log file is *optivo_broadmail.log.*

Conflicts with other Magento extensions

There may be conflicts between the Optimizely Campaign extension and other extensions if these extend the same Magento core functions. In particular, conflicts may occur in connection with other Magento extensions that also provide newsletter, SMTP or similar functions to the Optimizely Campaign extension.

Furthermore, local code adjustments in the code pool local can lead to additional by-effects or side effects in the interplay.

During error analysis, pay attention to which extensions and in-house developments are integrated in the Magento installation.

> **Tip:** To prevent these types of conflicts and integration malfunctions, first install your Magento platform with the Optimizely Campaign extension and other extensions being used onto a test system. Then, reproduce a range of different test scenarios there before carrying out the installation in a production environment.

Recipient and billing data

> **Note:** This topic is for administrators and developers with administration access rights in Magento 1.

If you are using Magento 1 as e-commerce platform, you can integrate the system with Optimizely Campaign. The following recipient data is provided by Magento and, using a transactional mail template, can be sent to Optimizely Campaign. When configuring the template, the variables from Magento are each assigned to a recipient list field in Optimizely Campaign. If you want to transfer variables that do not have a corresponding field in your transactional recipient list, contact customer support.

Field name	Date type
entity_id	Integer
parent_id	Integer
customer_address_id	Integer
quote_address_id	Integer
region_id	Integer
customer_id	Integer
region	String
postcode	String
lastname	String
street	String
city	String
email	String
telephone	String
country_id	String
firstname	String
address_type	String
prefix	String
middlename	String

© Optimizely 2022

Field name	Date type
suffix	String
company	String
vat_id	String
vat_is_valid	Boolean
vat_request_id	Integer
vat_request_date	String
vat_request_success	Boolean
giftregistry_item_id	Integer
country	String
salutation	String

Order details

> **Note:** This topic is for administrators and developers with administration access rights in Magento 1.

If you want to send more than the five standard order parameters (*product ID*, *order number*, *name*, *price* and *quantity*) provided by the function **getOptivoProducts** to Optimizely Campaign, you can use a custom template that aggregates and calculates the required variables. This template is linked using the following line and defined in the file **items.phtml**.

```
{{layout area="frontend" handle="optivo_email_order_items" order=$order}}
```

Note: To program the template, you need relevant PHP skills and good knowledge of the Magento object model or order items. Any changes must be applied only after consultation with customer support.

Field name	Data type
item_id	Integer
order_id	Integer
parent_item_id	Integer
quote_item_id	Integer
store_id	Integer
created_at	Date
updated_at	Date
product_id	Integer
product_type	String
product_options	String
weight	Float
is_virtual	Boolean
sku	String
Name	String
Description	String

© Optimizely 2022

Field name	Data type
applied_rule_ids	String
additional_data	String
free_shipping	Boolean
is_qty_decimal	Boolean
no_discount	Boolean
qty_backordered	Float
qty_canceled	Float
qty_invoiced	Float
qty_ordered	Float
qty_refunded	Float
qty_shipped	Float
base_cost	Float
price	Float
base_price	Float
original_price	Float
base_original_price	Float
tax_percent	Float
tax_amount	Float

© Optimizely 2022

Field name	Data type
base_tax_amount	Float
tax_invoiced	Float
base_tax_invoiced	Float
discount_percent	Float
discount_amount	Float
base_discount_amount	Float
discount_invoiced	Float
base_discount_invoiced	Float
amount_refunded	Float
base_amount_refunded	Float
row_total	Float
base_row_total	Float
row_invoiced	Float
base_row_invoiced	Float
row_weight	Float
gift_message_id	Integer
gift_message_available	Integer
base_tax_before_discount	Float

© Optimizely 2022

Field name	Data type
tax_before_discount	Float
ext_order_item_id	String
weee_tax_applied	String
weee_tax_applied_amount	Float
weee_tax_applied_row_amount	Float
base_weee_tax_applied_amount	Float
base_weee_tax_applied_row_amnt	Float
weee_tax_disposition	Float
weee_tax_row_disposition	Float
base_weee_tax_disposition	Float
base_weee_tax_row_disposition	Float
locked_do_invoice	Boolean
locked_do_ship	Boolean
price_incl_tax	Float
base_price_incl_tax	Float
row_total_incl_tax	Float
base_row_total_incl_tax	Float
hidden_tax_amount	Float

© Optimizely 2022

Field name	Data type
base_hidden_tax_amount	Float
hidden_tax_invoiced	Float
base_hidden_tax_invoiced	Float
hidden_tax_refunded	Float
base_hidden_tax_refunded	Float
is_nominal	Integer
tax_canceled	Float
hidden_tax_canceled	Float
tax_refunded	Float
event_id	Integer
giftregistry_item_id	Integer
base_tax_refunded	Float
discount_refunded	Float
base_discount_refunded	Float
gw_id	Integer
gw_base_price	Float
gw_price	Float
gw_base_tax_amount	Float

© Optimizely 2022

Field name	Data type
gw_tax_amount	Float
gw_base_price_invoiced	Float
gw_price_invoiced	Float
gw_base_tax_amount_invoiced	Float
gw_tax_amount_invoiced	Float
gw_base_price_refunded	Float
gw_price_refunded	Float
gw_base_tax_amount_refunded	Float
gw_tax_amount_refunded	Float
qty_returned	Float

Magento 2 integration

> **Note:** This topic is for administrators and developers with administration access rights in Magento 2.

If you are using Magento 2 as e-commerce platform you can integrate this with Optimizely Campaign to take advantage of your e-commerce and customer communication marketing activities.

With the Magento 2 integration, customers can subscribe/unsubscribe to newsletters directly in your shop. The integration transfers customer data received during registration to Optimizely Campaign so that you can use the information to personalize emails. You can also automatically send transactional mails like order confirmations and invoices. When registered customers change their data in the shop, customer data is synchronized. The integration also lets you transfer the product catalog to Optimizely Campaign daily.

The Magento 2 integration supports multiple clients, and the connection of several shops to Optimizely Campaign.

Feature range and supported versions

The Magento 2 integration provides the following features for Magento 2.0, 2.1, 2.2 and 2.3 (Community Edition).

- Newsletter subscription and unsubscription
- Transactional mails via HTTP API and SMTP API
- Export product catalog into Optimizely Campaign

Setting up in Optimizely Campaign

To set up the Magento 2 integration, contact customer support to get the integration software package.

Provide Optimizely with the following information:

- The version number of your Magento 2 system.
- The recipient list structure for your newsletter recipients. Let Optimizely know if you want to add additional fields.

The Magento 2 integration offers two ways to send transactional mails via Optimizely Campaign:

1. **Via the HTTP API**. When you want to use the Optimizely Campaign templates for your transactional mails. Optimizely requires the transaction recipient list for your transactional mails. Optimizely provides a default template for the transaction recipient list structure that is suitable for many applications/scenarios. Optimizely can discuss with you whether the standard template meets your requirements. See Transactional mails via HTTP API.
2. **Via the SMTP API**. When you want to use the Magento 2 templates for your transactional mails and Optimizely Campaign only for sending. If you want to use the SMTP

API, provide the IP address of your web shop for configuration purposes. See Transactional mails via SMTP API.

- For product catalog export to Optimizely Campaign, you need a user account on the Optimizely server. If you do not have a user account, contact customer support. Provide a **public key** and a **key fingerprint** to securely transfer the data. See .
- If you are running multiple shops (including sub-shops and shops that are localized in other languages), let Optimizely know the number of shops you want to connect to; see Advanced configuration.
- If you are integrating multiple shops, you may need:
  - Separate clients for the individual web shops.
  - A separate client for your transactional mails.
  - Setup of a recipient-list-based newsletter subscription.

Installation

> **Note:** This topic is for administrators and developers with administration access rights in Magento 2.

This topic describes how to install the Magento 2 integration, if you are using Magento as e-commerce platform with Optimizely Campaign.

Installing the integration package

> **Note:** To prevent problems and conflicts, first install and test the Magento 2 integration on a test system.

When you have received the integration software package (ZIP archive) from customer support, install it in Magento 2 as described in the following.

1. Unzip the ZIP archive.
2. Upload the unpacked folder to the directory **app/code/Optivo/Broadmail** in your Magento 2 system.
3. Clear the cache of the Magento 2 system.

4. Verify the successful upload of Magento 2 integration with the following console command:

   ```
   php bin/magento module:status
   ```

   If the upload is successful, the Magento 2 integration is displayed in the **List of disabled modules**.

5. Use the following console command to activate the Magento 2 integration:

   ```
   php magento module:enable Optivo_Broadmail
   ```

Installing updates

If you receive an updated version of the integration from customer support, do the following to install the upgrade:

1. Unzip the ZIP archive.
2. Upload the unpacked folder to the directory **app/code/Optivo/Broadmail** in your Magento 2 system.
3. Use the following console command:

   ```
   php bin/magento setup:upgrade
   ```

Uninstalling the integration package

Do the following to uninstall the Magento 2 integration:

1. Disable the Magento 2 integration by using the following console command:

   ```
   php bin/magento module:disable Optivo_Broadmail
   ```

2. Clear the cache with the following console command:

   ```
   php bin/magento cache:clean
   ```

3. Delete the Magento 2 integration files.

© Optimizely 2022

Configuring subscribes and unsubscribes

> **Note:** This topic is for administrators and developers with administration access rights in Magento 2.

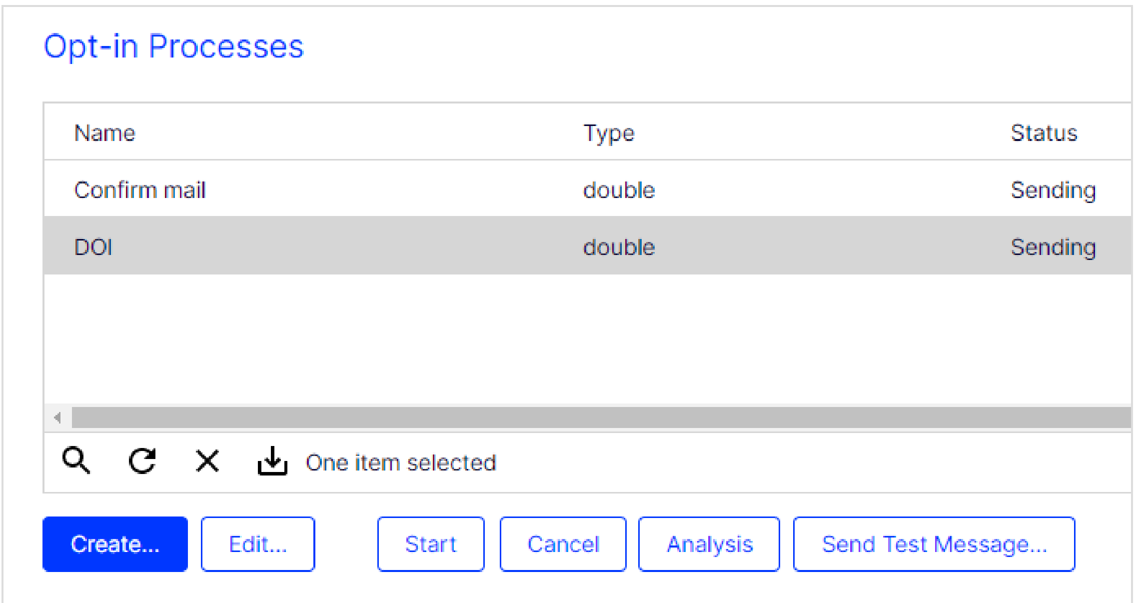
This topic describes how to configure the newsletter subscription and unsubscription feature, if you are using Magento 2 as e-commerce platform with Optimizely Campaign. It also shows how to transfer other recipient data to Optimizely Campaign, data that is not included in the standard configuration of the Magento 2 integration.

To configure subscribes and unsubscribes, do the following:

1. Configure the opt-in mailing (registration confirmations) in Optimizely Campaign, and then use a field function to reference the confirmation link to your shop.
2. Create two landing pages in Magento 2, one to display a successful newsletter subscription confirmation, and one to display a successful unsubscribe confirmation.
3. Store the client ID, the authorization code for the API access, and the ID of the opt-in process the shop.
4. Optional: Expand the recipient list structure, to transfer other recipient/customer data that is not included in the standard configuration of the Magento 2 integration.

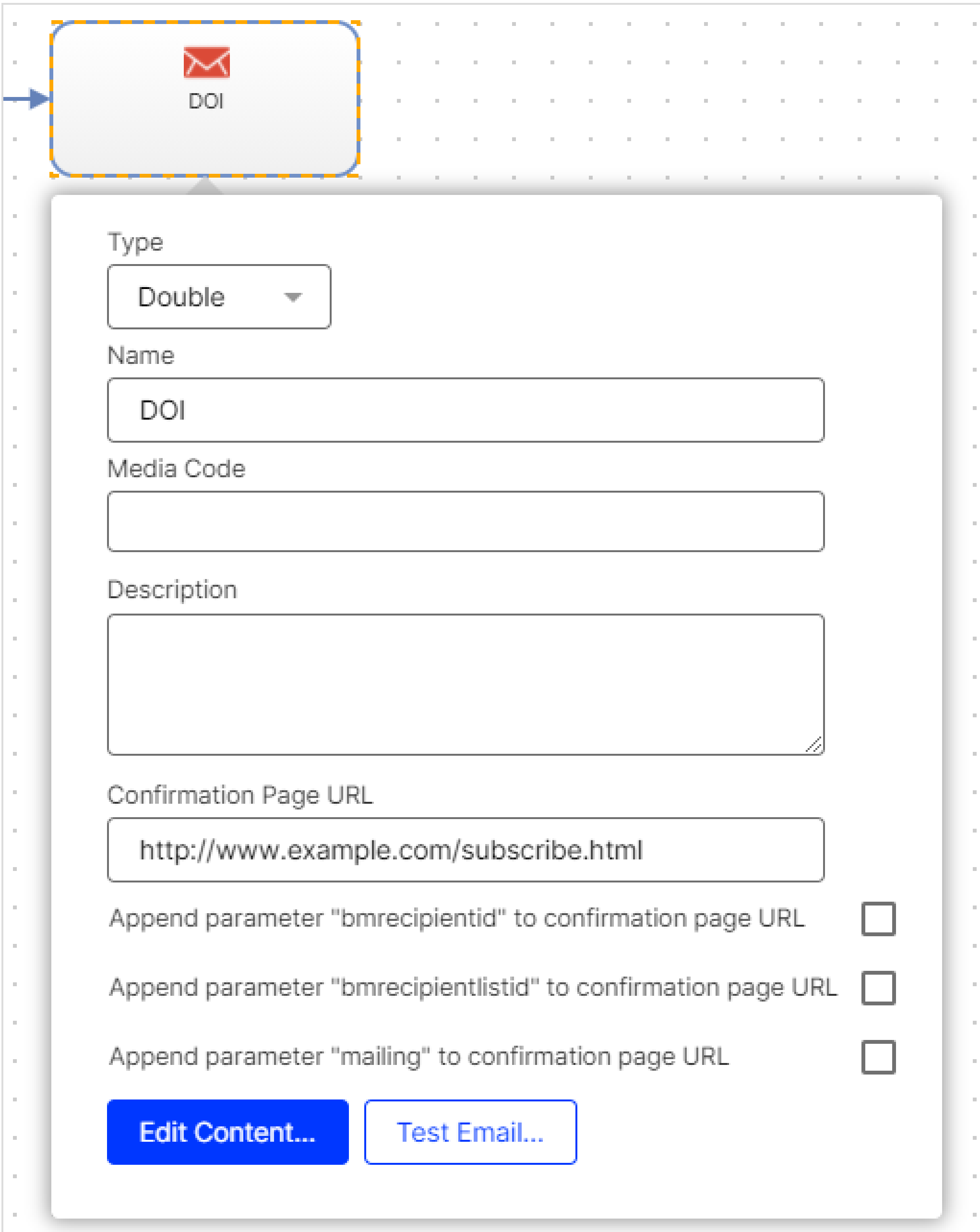
Configuring the opt-in mailing

1. Open the Optimizely Campaign menu and select **Campaigns** > **Opt-in Processes**.
2. Select the opt-in process for the connection to your shop and click **Edit...**.



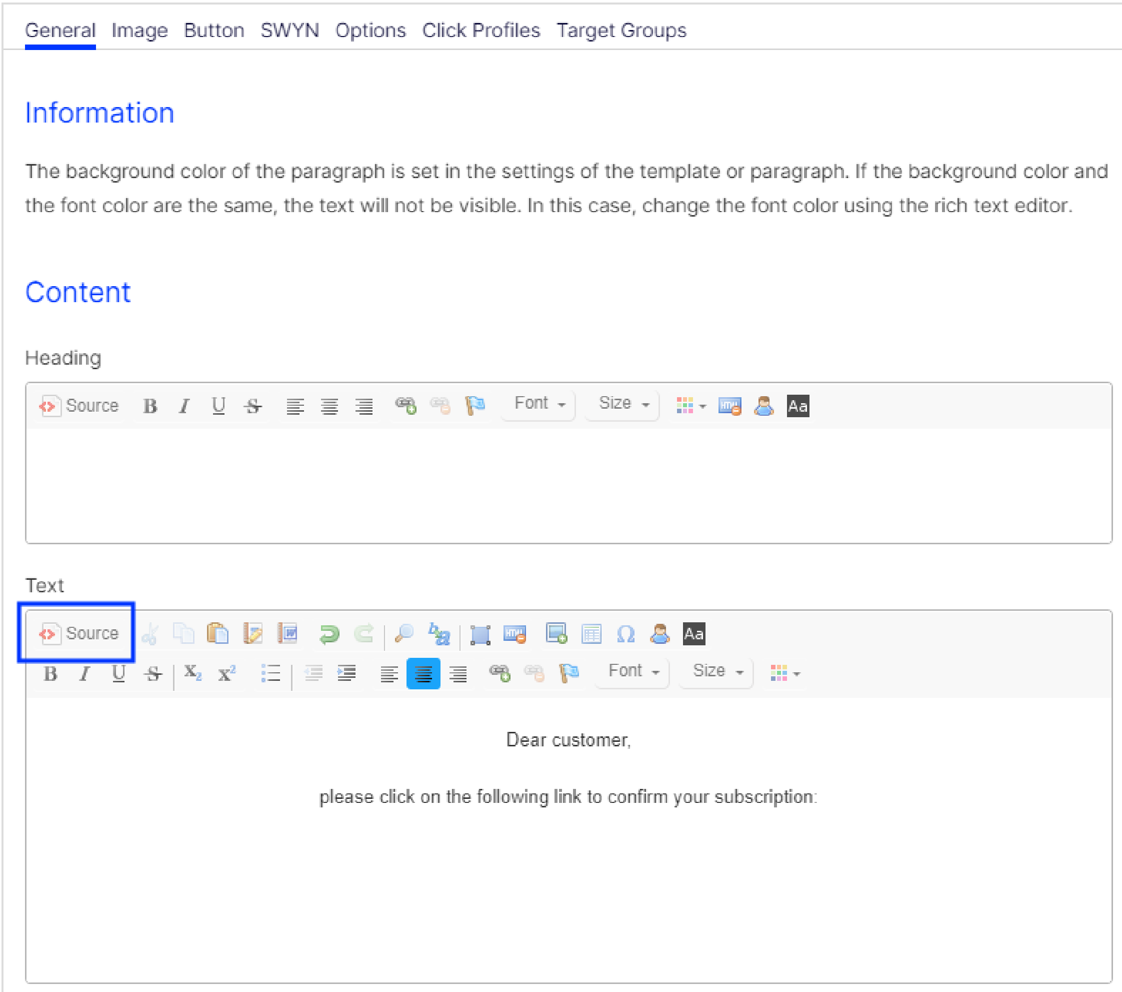
3. On the **Email** node, click **Properties** .

4. Click **Edit Content...**.



5. Click the name of the paragraph that contains the registration confirmation link.

6. In the **Text** area, click **Source**.



7. Replace the existing link with the following code lines/field functions:

```
{Double-Opt-In-Link}?id=${user.data.bmecssid}&code=${user.data.bmecsscc}
```

You will find the link to be replaced in the <a> tag between the quotation marks.

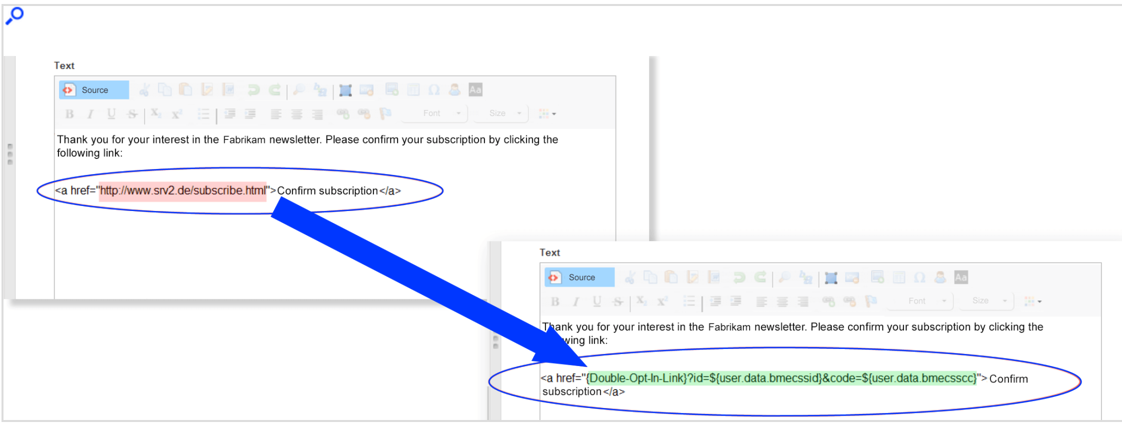
Example

The following link is contained in the <a> tag in the source code:

```
<a href="http://srv2.de/subscribe.html">Complete registration</a>
```

Replace the link between the quotation marks as follows:

```
<a href="{Double-Opt-In-Link}?id=${user.data.bmecssid}&code=${user.data.bmecsscc}">Complete registration</a>
```

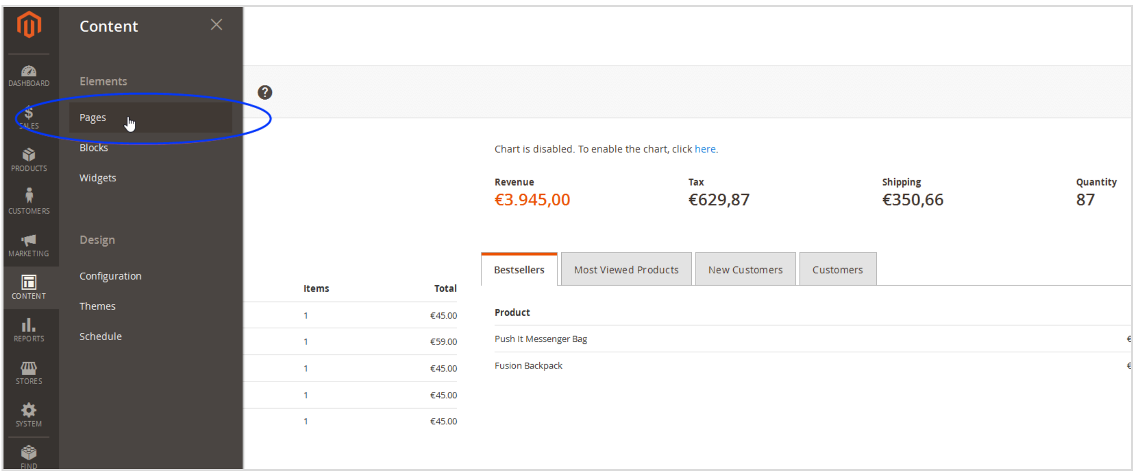


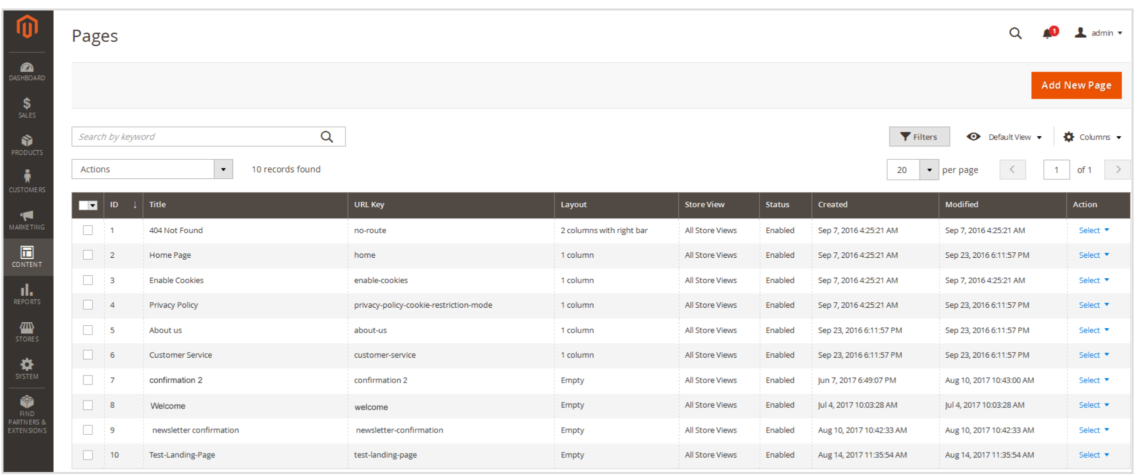
> **Note:** The parameters **id** and **code** enable the Magento 2 integration to map to the data sets in your shop.

8. Click **Apply** > **Close** > **Save and close**.

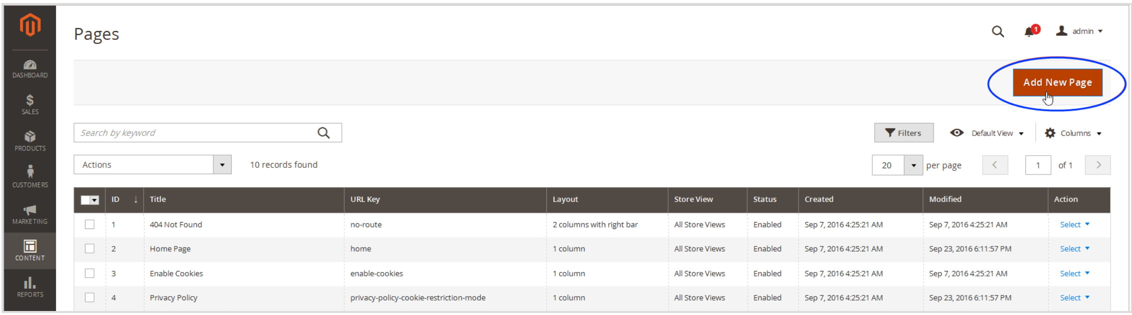
Creating landing pages

1. Log in to Magento 2 with administrator rights.
2. Select **Content** > **Pages**.

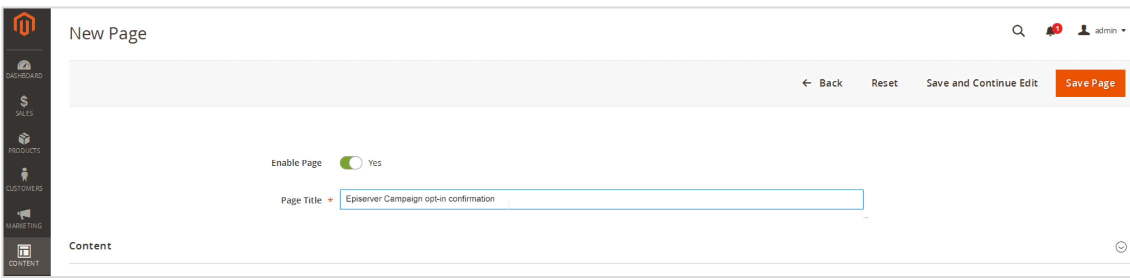




3. Click **Add New Page**.

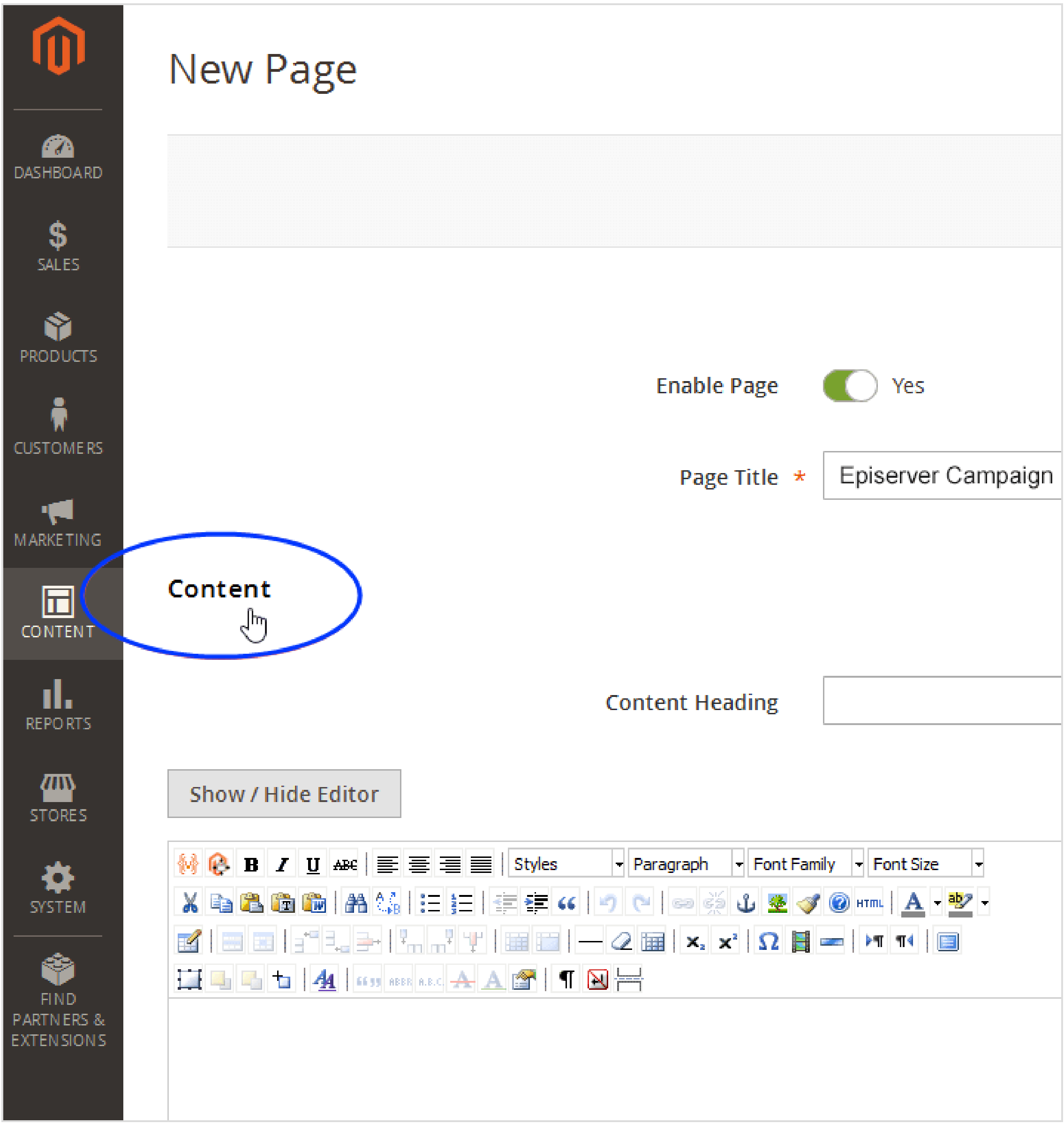


4. In the **Page Title** field, enter a name for the landing page.

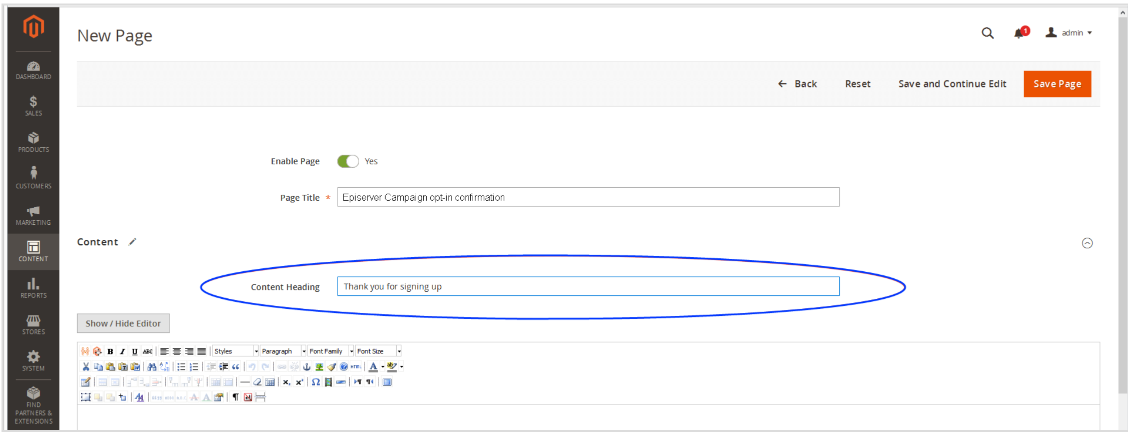


Note: Assign unique names to the landing pages, for example **Optimizely Campaign opt-in confirmation** or **Optimizely Campaign opt-out confirmation**.

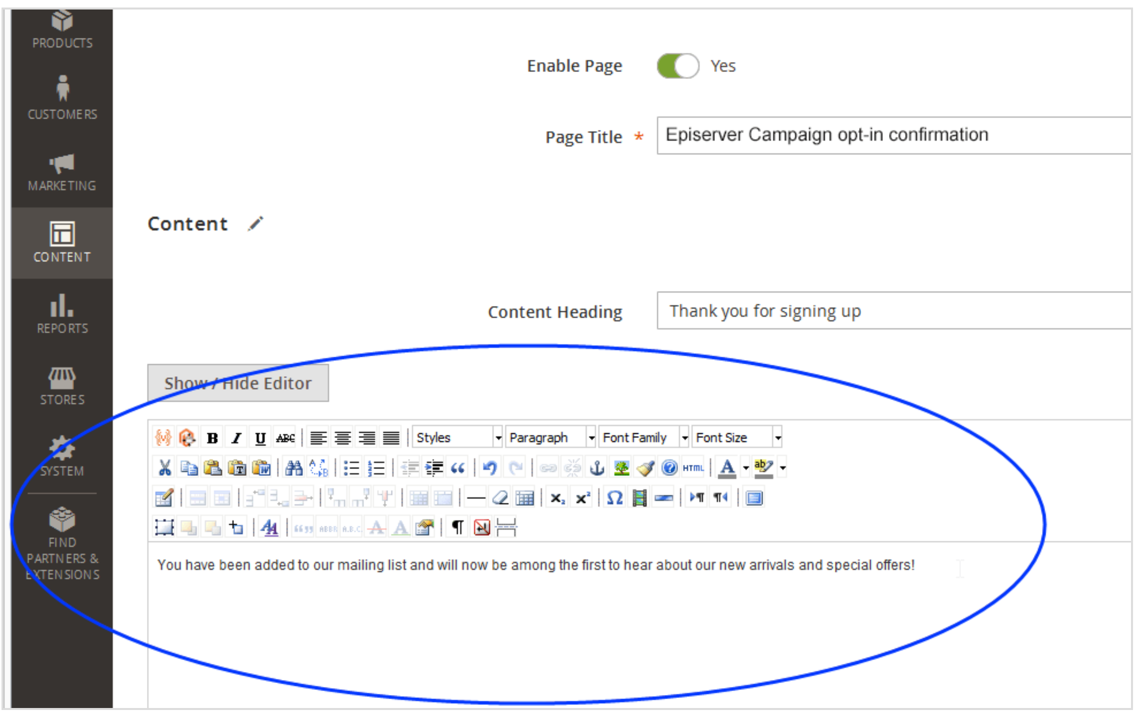
5. Click **Content**.



6. In the **Content Heading** box, enter the title that you want to display on the landing page.

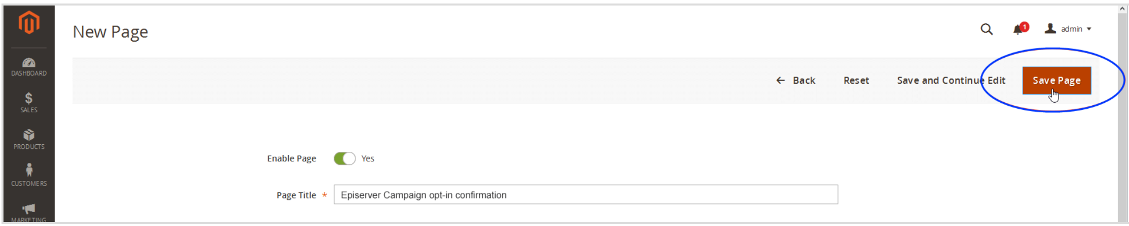


7. In the text box, enter the text that you want to display on the landing page.



8. Optional: If required, change other settings on the form, such as layout adjustments under **Design**.

9. Click **Save Page**.



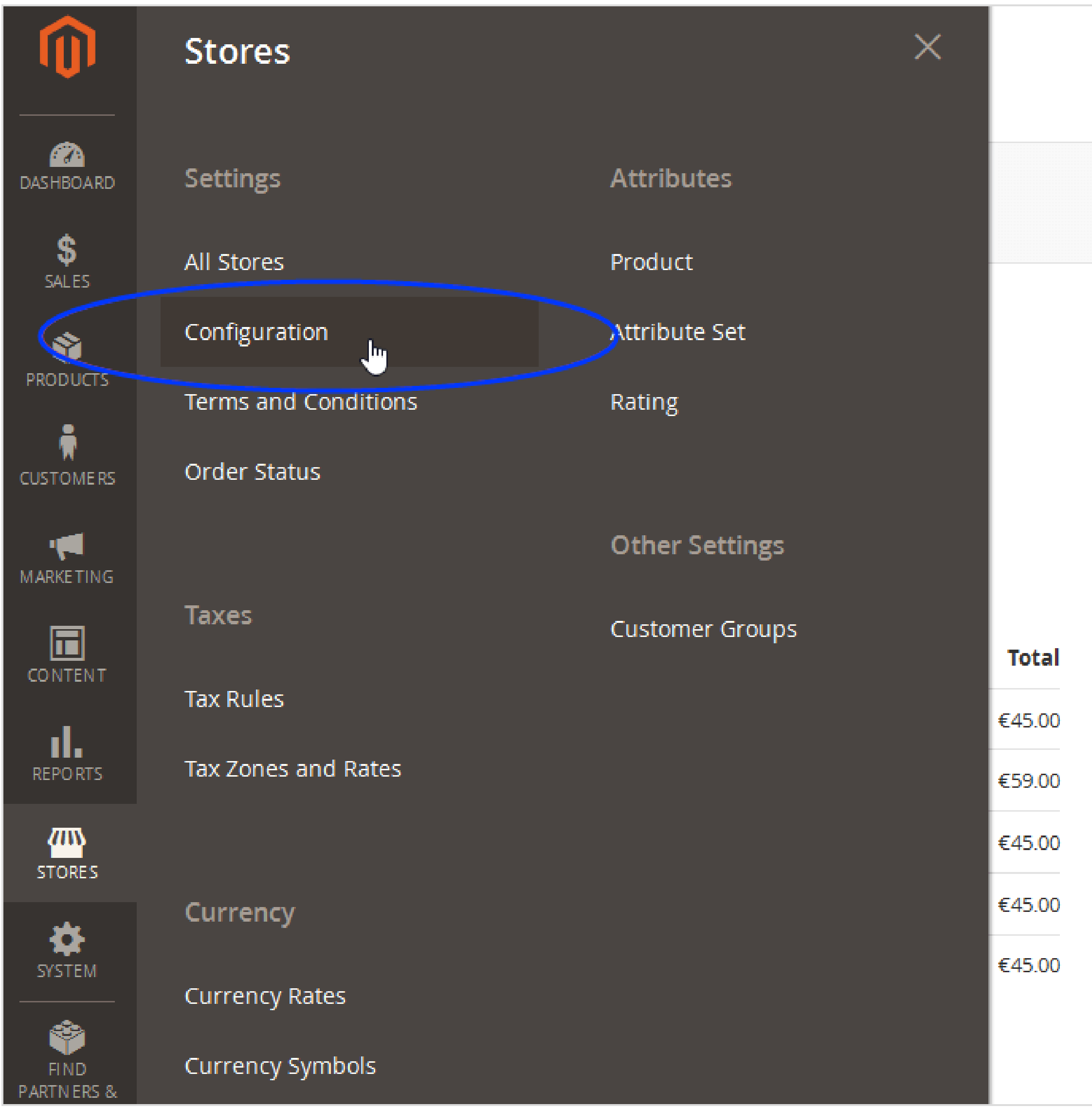
10. Repeat steps 3–9 for the second landing page you want to create.

Storing authorization code, opt-in, and client IDs

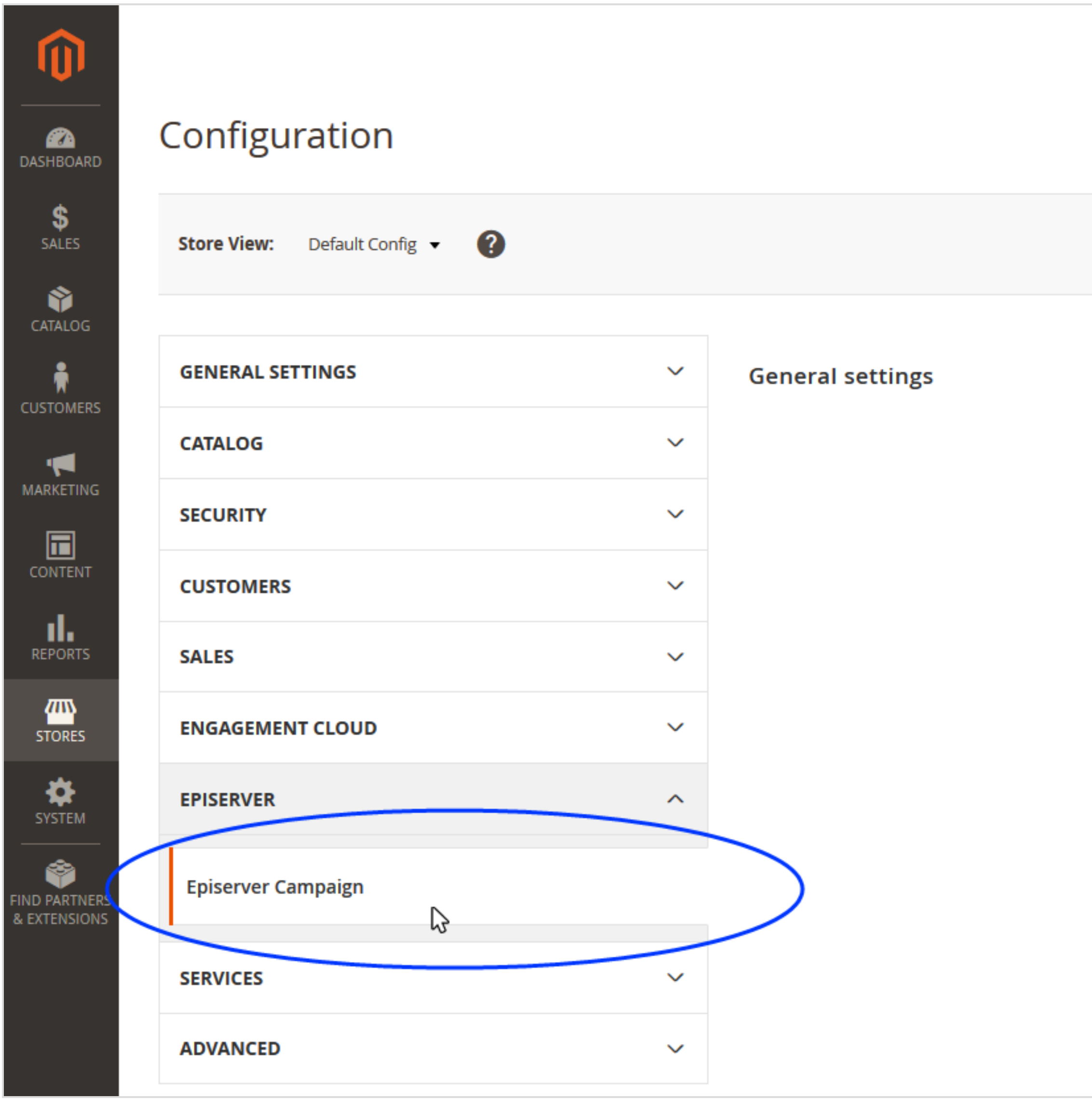
> **Note:** Do not confuse the recipient list for your newsletter recipients with the transaction recipient list for your transactional mails. Customer support will set up two different types of recipient lists for the sending of newsletters and the sending of transactional mails (for example order confirmations, invoices).

- **Authorization code**. For the Optimizely Campaign recipient list (created for you by customer support and saved in your client). You can locate the authorization code in your Optimizely Campaign client in the **API overview**. Open the **Recipient lists** tab and select the relevant recipient list. Click **Manage authorization codes** and copy the authorization code from the list. If no authorization code is available for the selected recipient list, click **Create authorization code**.
- **opt-in ID**. To see the opt-in ID, open the Optimizely Campaign menu and select **Administration** > **API overview** > **Opt-in processes**.
- **client ID**. To see the client ID, open the Optimizely Campaign menu and select **Administration** > **API Overview** > **REST API**.

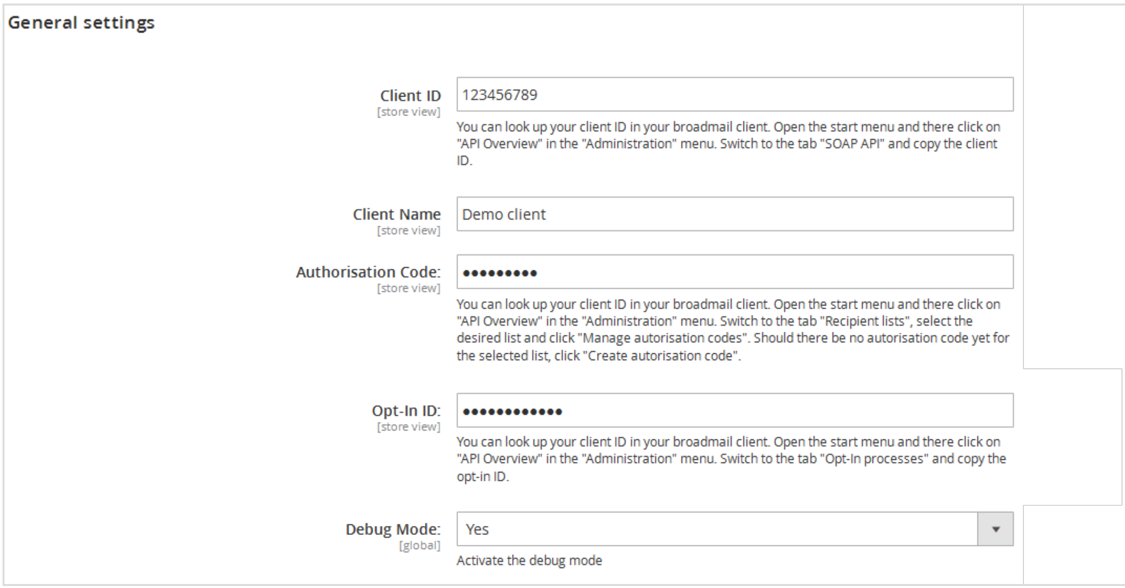
1. To store the parameters, log in to Magento 2 with administrator rights.
2. Select **Stores** > **Configuration**.



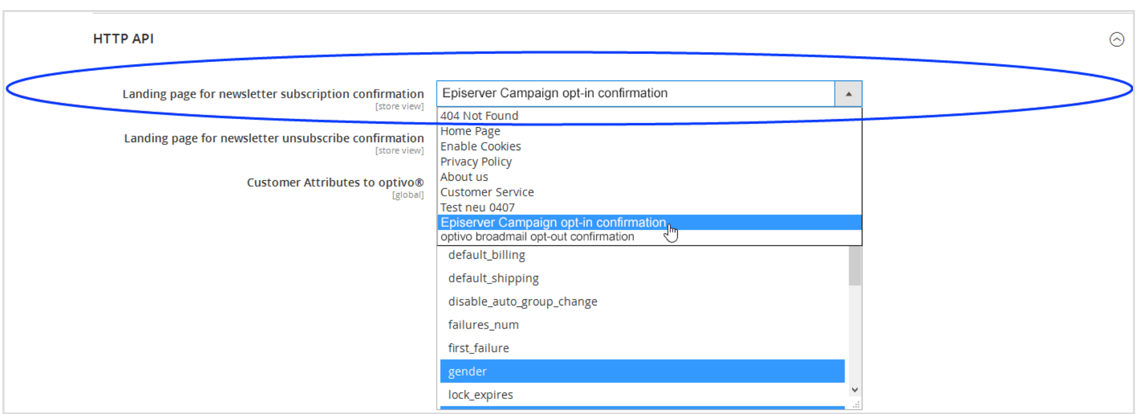
3. Select **Episerver** > **Episerver Campaign**.



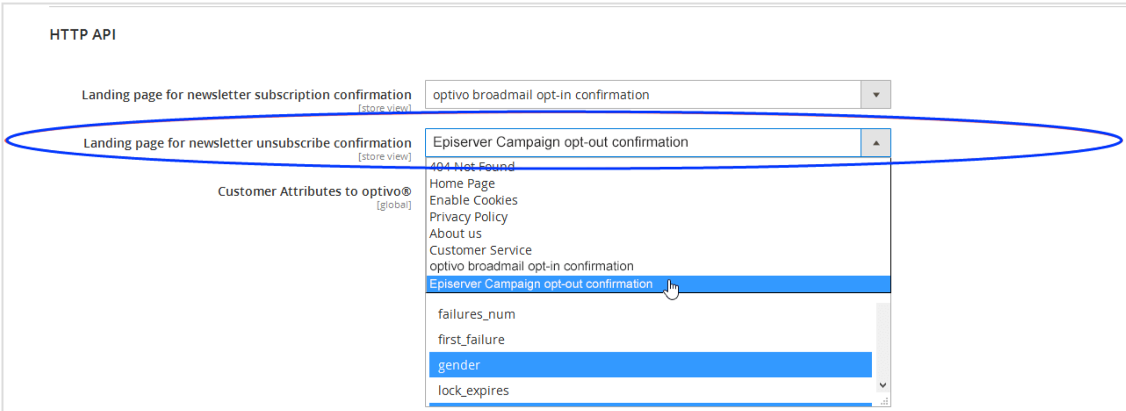
4. In **General Settings**, enter the following data:
   - **Client ID**. Enter the client ID.
   - **Client Name**. Enter a name for the client. You can choose any name for the client. However, use the same name as in Optimizely Campaign.
   - **Authorisation Code**. Enter the authorization code.
   - **Opt-In ID**. Enter the opt-in ID.
   - **Debug Mode**. Select **Yes**.



5. In the **HTTP API** area, from the **Landing page for newsletter subscription confirmation** drop-down list, select the landing page that you created for the newsletter registration in Magento 2.



6. In the **HTTP API** area, from the **Landing page for newsletter unsubscribe confirmation** drop-down list, select the landing page that you created for the newsletter unsubscription in Magento 2.



7. Save your changes.

> **Note:** Coded values (Client ID, Private key) must be entered anew with each saving process. Otherwise the coded value is coded anew.

Transferred attributes in the standard configuration

The Magento 2 integration only transfers the email addresses of customers who subscribe to the newsletter with their email address, but are not logged into their customer account. The data listed in the following table is transferred for customers who are logged into the customer account.

If a customer or an administrator changes the customer data in the **shop system**, the changes are automatically transferred to the Optimizely Campaign recipient list. Changes to customer data entered in a recipient list in Optimizely Campaign are ***not*** synchronized with your shop system by Magento 2 integration. For this reason, change customer data in your Magento 2 system to keep the information synchronized.

- **Email**. Email address of the customer/recipient
- **Salutation**. Title
- **Firstname**. First name
- **Lastname**. Last name
- **Language**. Language of the shop set up in Magento 2 in which the customer has registered

- **Street**. Street
- **Zip**. Postal code
- **City**. City
- **State**. State
- **Country**. Country
- **bmecssid**. ID generated by Magento 2 integration and used for identification during communication with Optimizely Campaign
- **bmecsscc**. Confirmation code generated by Magento 2 integration and used for identification during communication with Optimizely Campaign
- **store_id**. ID of the web shop in which the customer has registered
- **dob**. Date of birth
- **group_id**. Customer group

Expanding the recipient list structure and transferring additional recipient data

You can transfer other recipient/customer data from Magento 2 to Optimizely Campaign, in addition to the standard attributes. To set up the transfer, you need to:

- Request additional recipient list fields.
- Enable the additional recipient data in Magento 2.

> **Note:** The additional attribute fields in Magento 2 must be programmed in accordance with the specifications of Magento 2. Additional attribute fields that have not been programmed according to the Magento 2 specifications cannot be transferred to Optimizely Campaign.

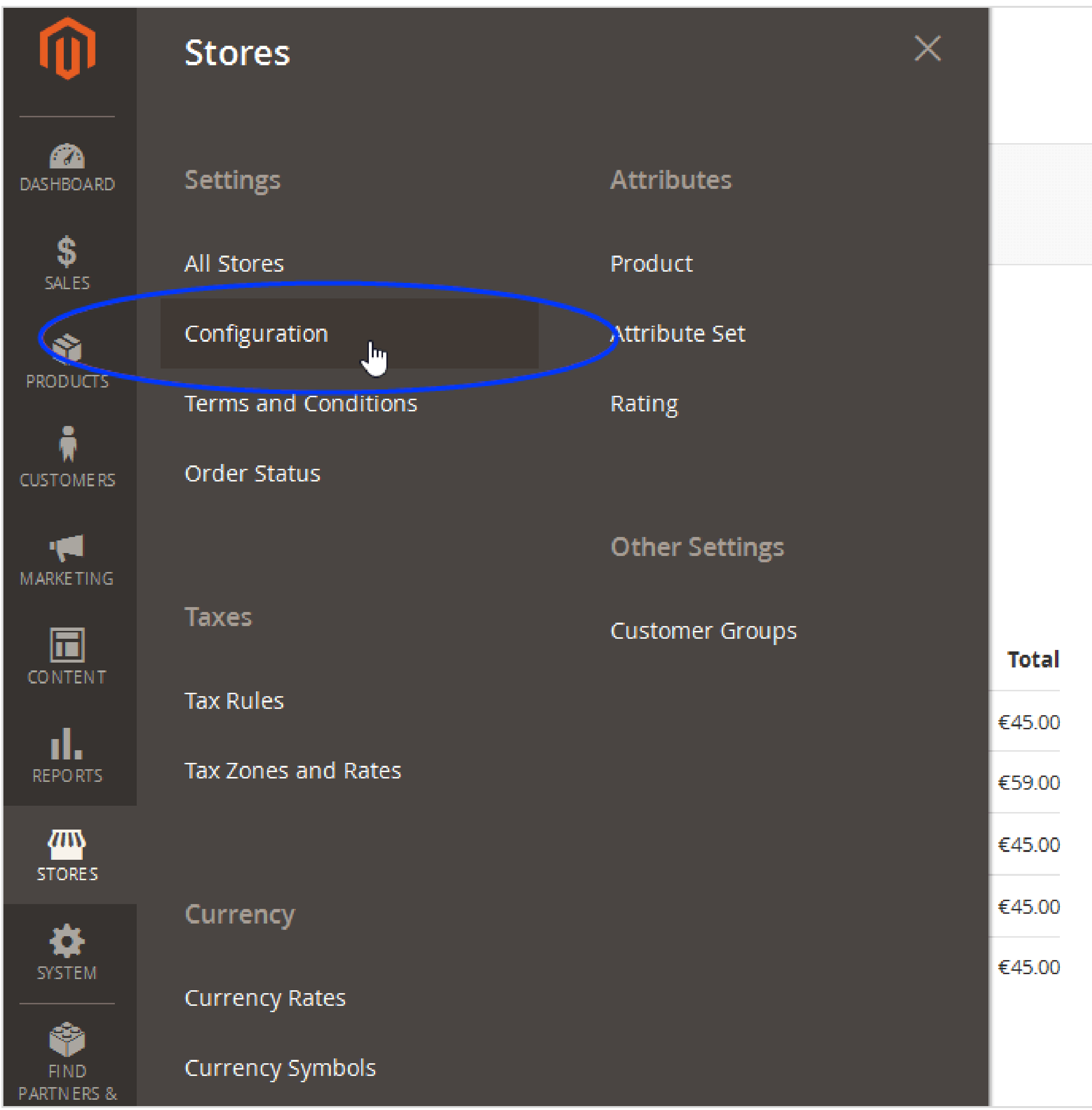
Requesting additional recipient list fields

To request additional recipient list fields, contact customer support and let Optimizely know which additional recipient list fields you require for user-defined attributes. Customer support will expand your list of recipients with the additional recipient list fields as per your requirements.

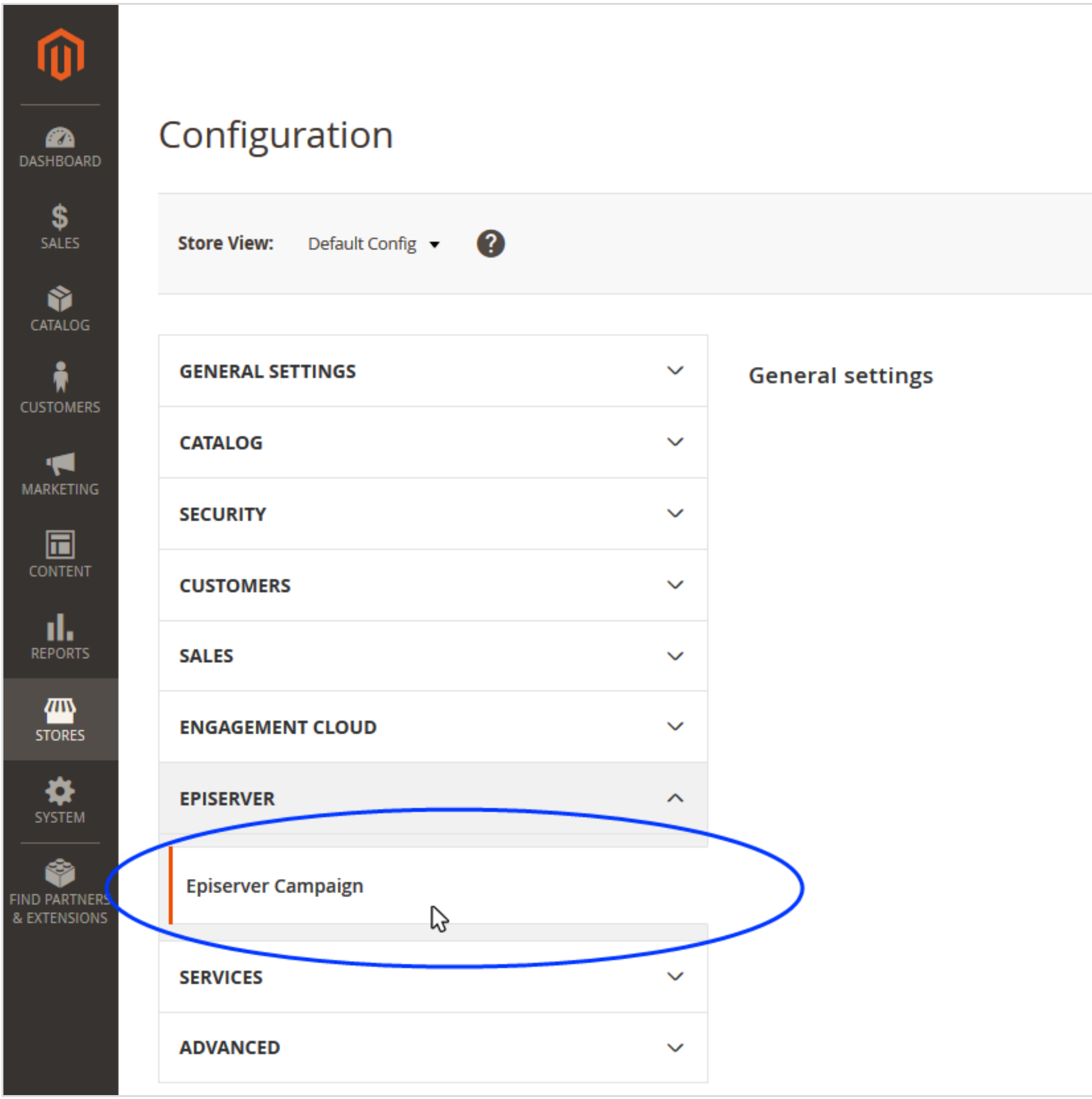
Enabling the transfer of additional recipient data

After customer support adds the requested recipient list fields, activate the transfer of the corresponding recipient data via HTTP API in Magento 2.

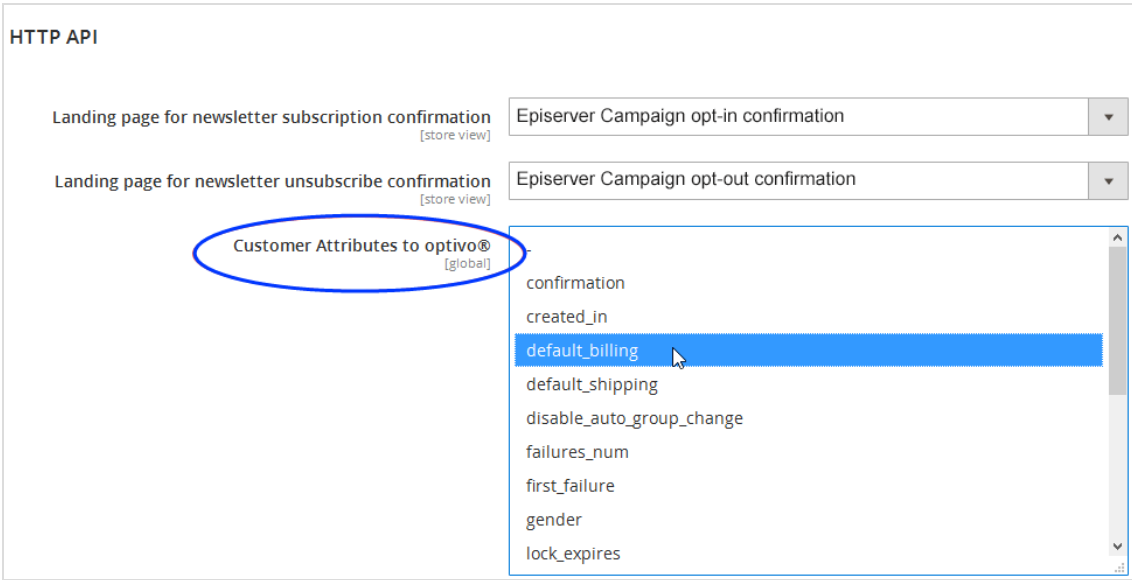
1. Log in to Magento 2 with administrator rights.
2. Select **Stores** > **Configuration**.



3. Select **Episerver** > **Episerver Campaign**.



4. In the **HTTP API** area, in the **Configure additional customer attributes to transmit** list, select the additional recipient data that you want to transfer to Optimizely Campaign in addition to the standard attributes.



> **Tip:** Hold down **CTRL** to select multiple attributes at the same time.

5. Save your changes.

Configuring transactional mails via HTTP API

> **Note:** This topic is for administrators and developers with administration access rights in Magento 2.

This topic describes how to configure sending of transactional mails via HTTP API with Magento 2. For transactional mails via the SMTP API, see Transactional mails via SMTP API.

How it works

Sending of transactional mails via HTTP API uses these templates:

- A *Sender* template in Magento 2, which sends the variables of the transaction (for example customer name, ordered products) via the HTTP API.

- A *Recipient* template in Optimizely Campaign, which uses field functions to insert sent variables into relevant locations. This creates the finished transactional mail with layout.

Sending and receiving the content of the variables takes place using the transaction recipient list as a *buffer*.

1. The Magento 2 template sends the variables.
2. The variables are written to the transaction recipient list: each variable into the relevant recipient list field.
3. Using field functions, Optimizely Campaign copies the template with the individual variables from the transaction recipient list and places it in the desired location in the transactional mail.

Configuration steps

1. Set up a transaction recipient list.
2. Create the template in Optimizely Campaign.
3. Create and activate the template in Magento 2.
4. Configure transactional mails and transfer Magento 2 variables.

Step 1. Setting up a transaction recipient list

To set up the transaction recipient list. contact customer support. Plan in advance which variables you want to transfer from Magento 2 into Optimizely Campaign for your transactional mails.

List the Magento 2 variables for which you require a corresponding recipient list field in your transaction recipient list. Also, let Optimizely know the naming of the recipient list fields.

> **Note:** The scope of the transaction recipient list is limited. For this reason, you should request generic names for the recipient list fields, for example custom_string_1, custom_string_2, custom_date_1 and so on.

Step 2. Creating a template in Optimizely Campaign

Create the template and add the desired transactional mail texts (the unchangeable, static texts that are to be sent to recipients) and insert **field functions** in the places where the content of the Magento 2 variables should be.

Field functions

Field functions are placeholders that refer to a specific recipient list field in your transaction recipient list. The variables and content of the variables sent from Magento 2 are written into the relevant recipient list fields in your transaction recipient list. The field functions you place load relevant content from the referenced recipient list field in the next step.

Example

Set up a transactional mail text that greets each customer using the last name and the order date. For this you need these variables: **salutation**, **lastname** and **orderdate**.

The content of the variables is first written to a relevant recipient list field of the transaction recipient list (from Magento 2 via the HTTP API). To access these recipient list fields, insert the individual field functions into the Optimizely Campaign template and place the name of the recipient list field in curly brackets. To import the variable contents, the static text and field functions in the Optimizely Campaign template could look like this:

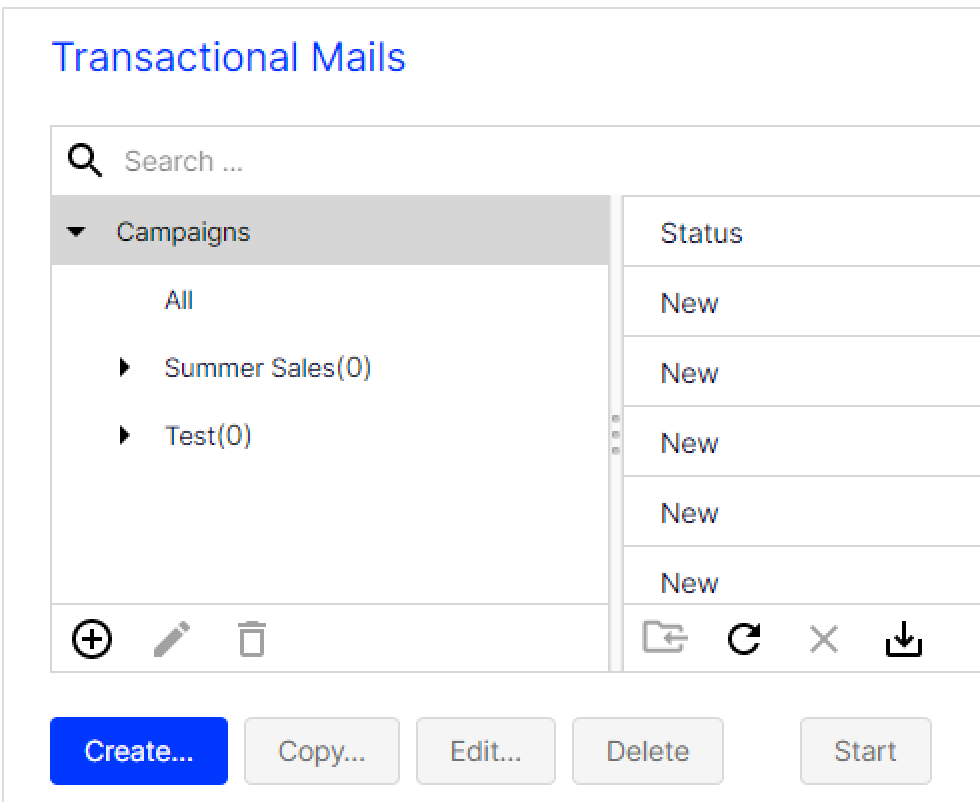
```
Hello, {salutation} {lastname}!
Thank you for your online order from {orderdate}.
```

The example will appear in the sent transactional mail as follows:

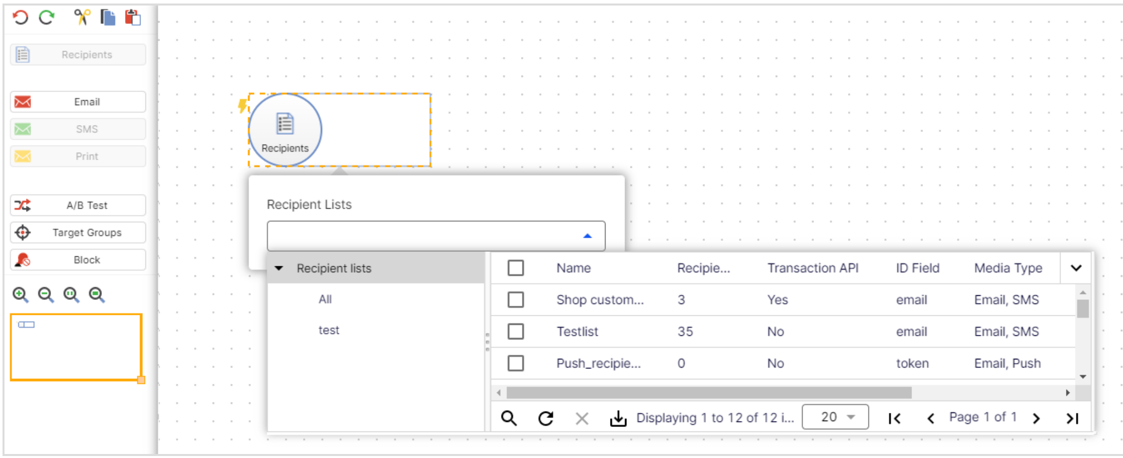
Hello, Mr. Miller!
Thank you for your online order from August 3.

Adding static texts and field functions to a template

1. Open the Optimizely Campaign menu and select **Campaigns** > **Transactional Mails**.
2. Click **Create**.

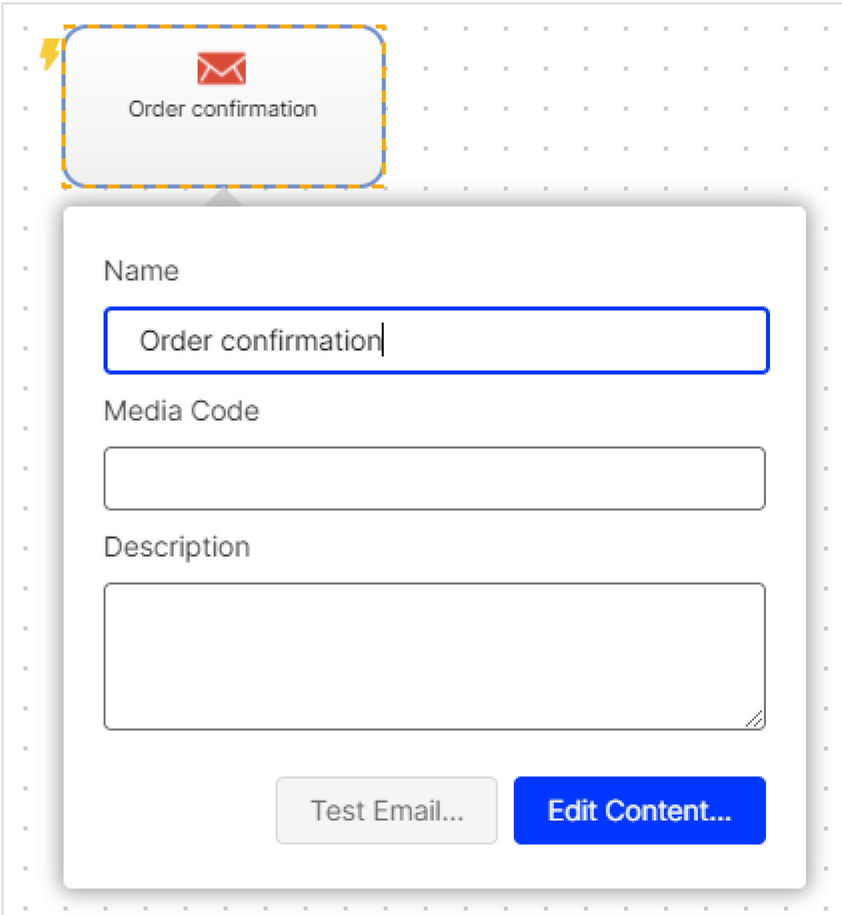


3. From the left action pane, drag the **Recipients** node into the workspace.
4. In the **Recipient lists** drop-down list in the context menu, select your transaction recipient list.



Note: Customer support has set up a separate transaction recipient list for you. Make sure you use this transaction recipient list, instead of a regular recipient list. To see if a recipient list is a transactional recipient list, check the column **Transaction API**.

5. From the left sidebar, drag the message node for the desired marketing channel (email, SMS) into the workspace.
6. In the **Name** box in the context menu, enter a name for your transactional mail (for example *Order confirmation*).



7. In the context menu for the message node, click **Edit content**.
8. In the **Template** list, select the desired template and confirm your selection by clicking **Next**.
9. Configure the template for the transactional mail according to your requirements. Enter a subject and insert the static texts that recipients will receive, into the content paragraphs. Insert the relevant field function for the recipient list field of the transaction recipient list into places where variables from the Magento 2 template should appear (see example above).
10. Click **Apply**.
11. Click **Close**.
12. Connect the **Recipients** node with the message node.
13. Click **Save and Close**.

14. Select the mailing in the overview and click **Start** to activate your transactional mail and to start the sending process.

Step 3. Creating and activating the template in Magento 2

Create a template in Magento 2 that sends the variables to Optimizely Campaign via HTTP API.

Prerequisites

- **Authorization code**. For your transaction recipient list in to Optimizely Campaign.

  Open the Optimizely Campaign menu and select **Administration** > **API Overview** > **Recipient lists** tab and select the desired transaction recipient list. Click **Manage authorization codes** and copy the authorization code from the list. If no authorization code is available for the selected recipient list, click **Create authorization code.**

- **Mailing ID**. For the template in Optimizely Campaign.

  Open the Optimizely Campaign menu and select **Campaigns** > **Transactional Mails**. Copy the relevant mailing ID of the template in the list in column **ID**.

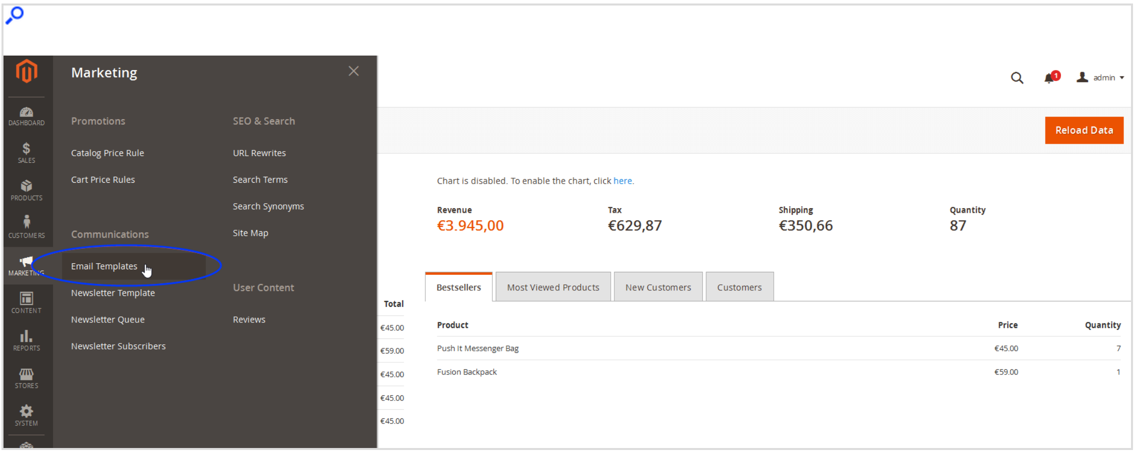
Configuration options

With Magento 2, you have two template configuration options for transferring variables:

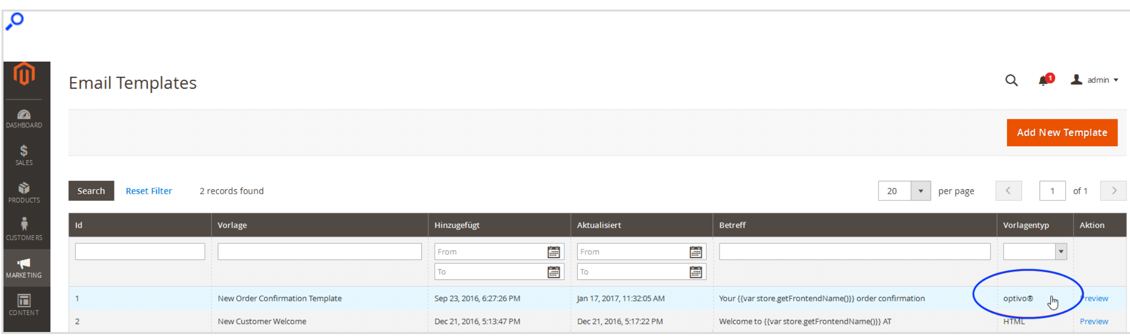
1. Use a template included in the standard Magento 2 installation and customize it to fit your needs. If you choose this option, the template's HTML code loads in the template content field. The code contains the available variables, for example `{{trans "%name," name=$customer.name}}` (for addressing customers by their names). Clean up the template around the HTML code and reduce the template to the variables. In the next step, map the corresponding recipient list fields of your transaction recipient list in Optimizely Campaign. See Mapping: Here’s how you do it.
2. Create an empty template and manually insert the variables to be sent to Optimizely Campaign via the HTTP API.

Do the following to create a template, add the variables and map these to the recipient list fields of your transaction recipient list.

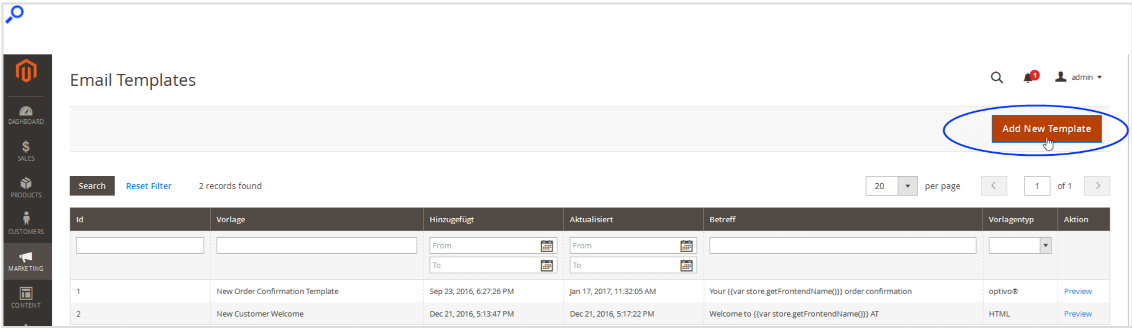
1. Log in to Magento 2 with administrator rights.
2. Select **Marketing** > **Email Templates**.



Note: If you already created templates that are sent to Optimizely Campaign, these appear as the template type **Episerver**.



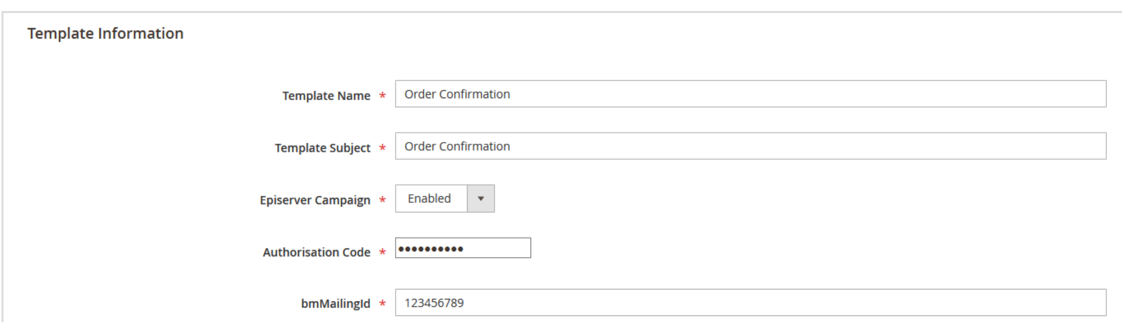
3. Click **Add New Template**.



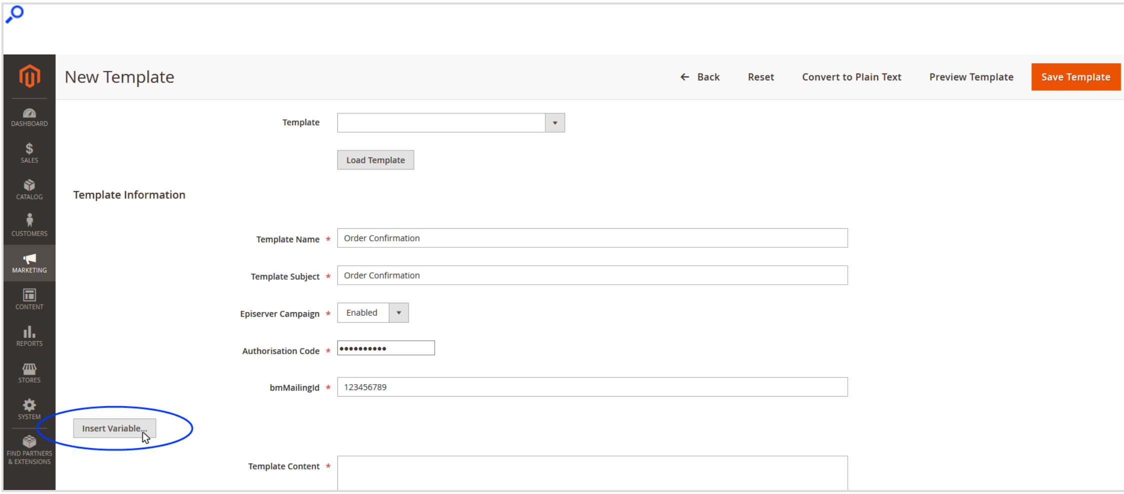
4. In the **Template Information** area, fill in the fields:
   - **Template Name**. Enter a name for the new template.
   - **Template Subject**. Leave empty.

     > **Note:** The subject is automatically entered later using the subject from the template created in Optimizely Campaign.

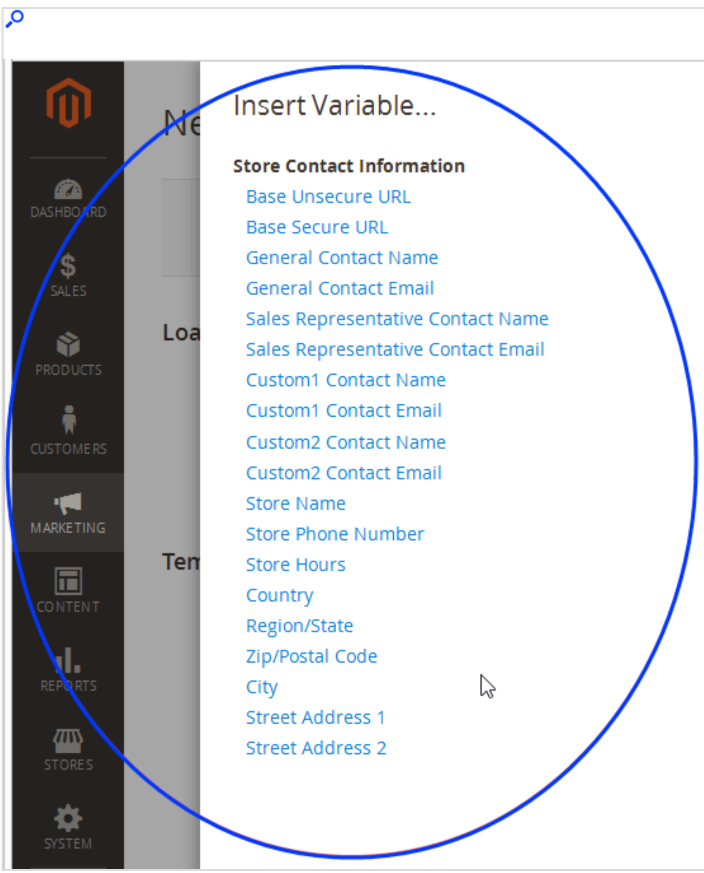
   - **Episerver Campaign**. Select **Enabled**.
   - **Authcorisation Code**. Enter the authorization code for the transaction recipient list in Optimizely Campaign.
   - **bmMailingId**. Enter the mailing ID of the template in Optimizely Campaign.

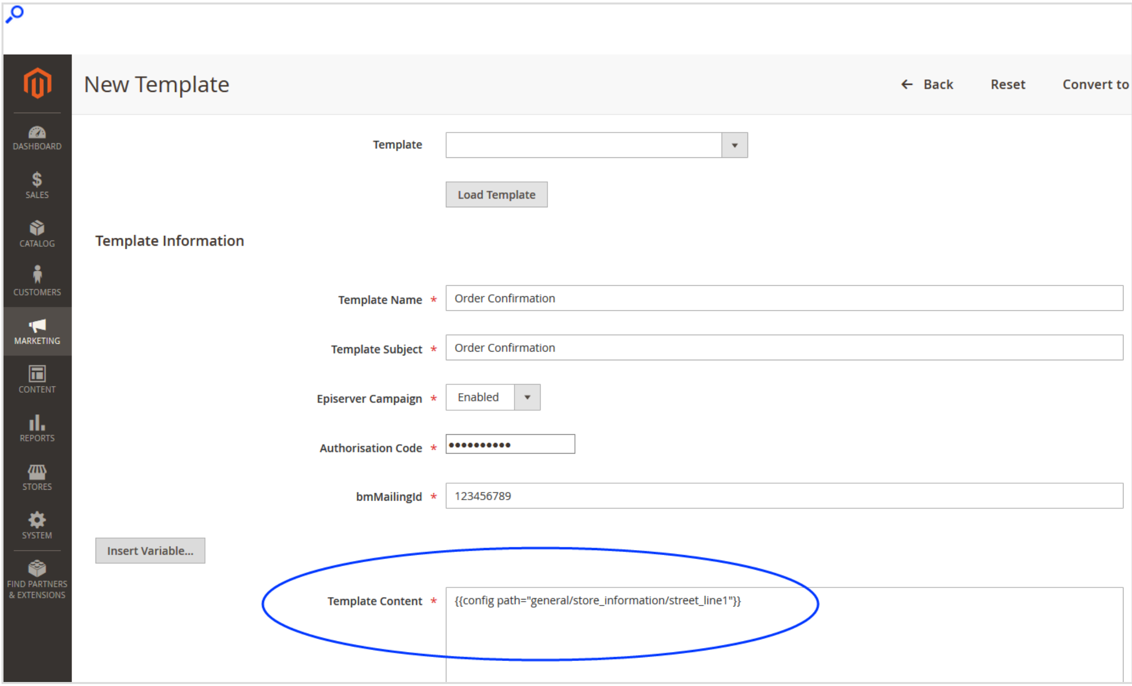


5. In the **Template Information** box, enter which variables from Magento 2 should be transferred to which recipient list field of the transaction recipient list in Optimizely Campaign. To add a variable, click **Insert Variable...**



6. Select the desired variable by clicking it.





7. Map the inserted variable with the corresponding recipient list field in Optimizely Campaign. If required, click **Insert Variable...** to add further variables.
How to do the mapping

Magento 2 integration from Optimizely Campaign uses the following structure for mapping:

```
Name of the recipient list=name of the Magento 2 variables
```

Enter the mapping assignment for each variable line by line, and separate the individual variables/mapping instructions with a line break.

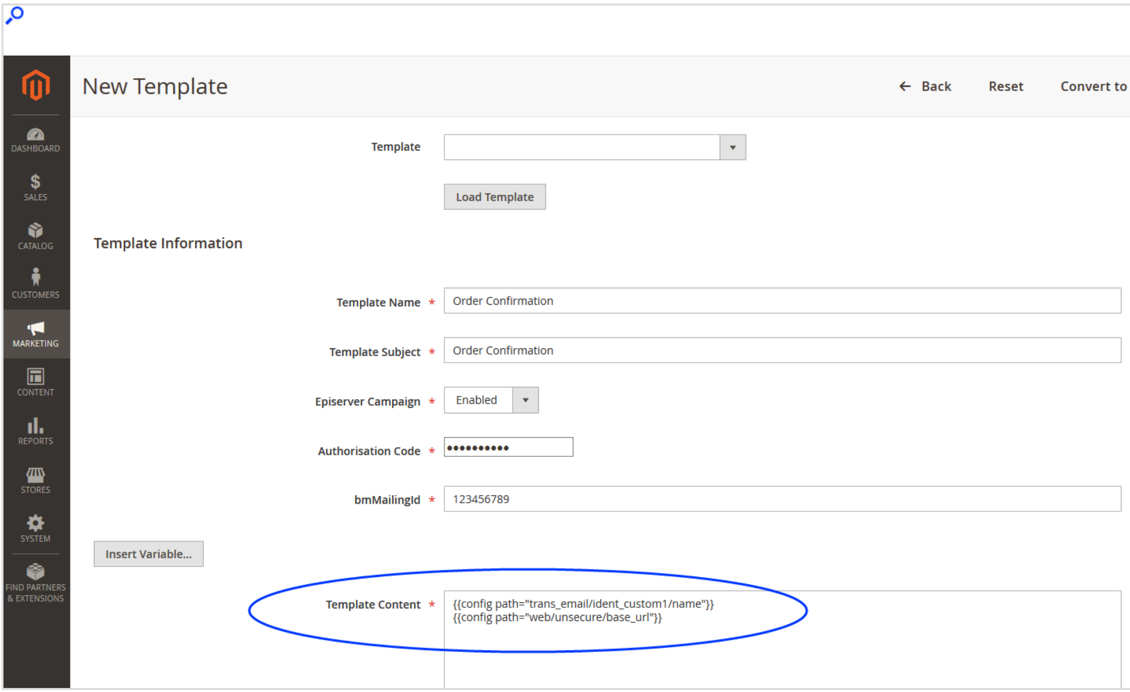
Example:

```
lastname={{config path="trans_email/ident_custom1/name"}}
url={{config path="web/secure/base_url"}}
```

Map with both example lines and transfer:

- Value of the Magento 2 variables `{{config path="trans_email/ident_custom1/name"}}` into the transaction recipient list field **lastname**

- Value of the Magento 2 variables `{{config path="web/secure/base_url"}}` into the transaction recipient list field **url**



8. Click **Save Template**.
9. After you create the template, activate it and map an event (for example an order process, or newsletter registration). At which point in the admin interface you map and activate the template to an event depends on the type of the event.

   Example: To map and activate the template to the event type **Order**, do the following:

   a. Select **Stores** > **Configuration**.
   b. Select **Sales** > **Sales Emails**.
   c. Activate the template by selecting it in the **Order** area in the **New Order Confirmation Template** drop-down list.
   d. Save your changes.

Step 4. Configuring transactional mails and transferring Magento 2 variables

To transfer customer orders and billing and delivery addresses to the template in Optimizely Campaign, using the template in Magento 2, you need additional configuration, and create a special field function (for order access) in your Optimizely Campaign client.

> **Note:** Magento 2 provides the customer orders and billing and delivery addresses as HTML code. This needs to be changed to simple text so that Optimizely Campaign can process the information.

Converting HTML code to simple text

The following functions in the Magento 2 integration are for converting the HTML code into simple text:

getEpiserverBillingData( )

With `getEpiserverBillingData( ),` you get access to the individual parameters of the billing address. This feature is available via the following instruction, used in an example for the salutation of the customer:

```
{{var order.getEpiserverBillingData('salutation')}}
```

You transfer the return value of the function call (parameter **salutation**) into the recipient list field **salutation** as simple text with the following mapping:

```
salutation={{var order.getEpiserverBillingData('salutation')}}
```

getEpiserverBillingData( ) parameters

No.	Parameter	Description
1	salutation	Title
2	firstname	First name
3	middlename	Middle name
4	lastname	Last name
5	company	Company

No.	Parameter	Description
6	email	Email address
7	telephone	Telephone number
8	suffix	Extension
9	fax	Fax number
10	street	Street
11	postcode	Postal code
12	city	City
13	region	Region/state
14	country	Country

getEpiserverShippingData()

With `getEpiserverShippingData( ),` you receive access to the individual parameters of the customer's delivery address. The feature is available via the following mapping, in this example for the customer's last name:

```
{{var order.getEpiserverShippingData('lastname')}}
```

You transfer the return value of the function call (parameter **lastname**) into the recipient list field **lastname** as simple text with the following mapping:

```
lastname={{var order.getEpiserverShippingData('lastname')}}
```

getEpiserverShippingData() parameters

No.	Parameter	Description
1	salutation	Title

No.	Parameter	Description
2	firstname	First name
3	middlename	Middle name
4	lastname	Last name
5	company	Company
6	email	Email address
7	telephone	Telephone number
8	suffix	Extension
9	fax	Fax number
10	street	Street
11	postcode	Postal code
12	city	City
13	region	Region/state
14	country	Country

getEpiserverOrderData()

With `getEpiserverOrderData( ),` you access the customer's orders.

> **Note:** Accessing orders differs from accessing the billing and the delivery addresses, as you transfer a list with several parameters into a single recipient list field, instead of transferring individual parameters.

© Optimizely 2022

The function is available via the following instruction (in this example, product ID, storage unit, product name, quantity ordered and price):

```
{{var order.getEpiserverOrderData('product_id','sku','name','qty_ordered',
'price')}}
```

You transfer a string with the order information specified in the **order_positions_csv** into the recipient list field with the following mapping:

```
order_positions_csv={{var order.getEpiserverOrderData('product_id',
'sku','name','qty_ordered','price')}}
```

getEpiserverOrderData( ) parameters

No.	Parameter
1	increment_id
2	state
3	status
4	coupon_code
5	shipping_description
6	is_virtual
7	store_id
8	base_discount_amount
9	base_discount_canceled
10	base_discount_invoiced
11	base_discount_refunded
12	base_grand_total

No.	Parameter
13	base_shipping_amount
14	base_shipping_canceled
15	base_shipping_invoiced
16	base_shipping_refunded
17	base_shipping_tax_amount
18	base_shipping_tax_refunded
19	base_subtotal
20	base_subtotal_canceled
21	base_subtotal_invoiced
22	base_subtotal_refunded
23	base_tax_amount
24	base_tax_canceled
25	base_tax_invoiced
26	base_tax_refunded
27	base_to_global_rate
28	base_to_order_rate
29	base_total_canceled
30	base_total_invoiced

© Optimizely 2022

No.	Parameter
31	base_total_invoiced_cost
32	base_total_offline_refunded
33	base_total_online_refunded
34	base_total_paid
35	base_total_qty_ordered
36	base_total_refunded
37	discount_amount
38	discount_canceled
39	discount_invoiced
40	discount_refunded
41	grand_total
42	shipping_amount
43	shipping_canceled
44	shipping_invoiced
45	shipping_refunded
46	shipping_tax_amount
47	shipping_tax_refunded
48	store_to_base_rate

© Optimizely 2022

No.	Parameter
49	store_to_order_rate
50	subtotal
51	subtotal_canceled
52	subtotal_invoiced
53	subtotal_refunded
54	tax_amount
55	tax_canceled
56	tax_invoiced
57	tax_refunded
58	total_canceled
59	total_invoiced
60	total_offline_refunded
61	total_online_refunded
62	total_paid
63	total_qty_ordered
64	total_refunded
65	base_shipping_discount_amount
66	base_subtotal_incl_tax

© Optimizely 2022

No.	Parameter
67	base_total_due
68	shipping_discount_amount
69	subtotal_incl_tax
70	total_due
71	base_currency_code
72	discount_description
73	global_currency_code
74	order_currency_code
75	shipping_method
76	store_currency_code
77	store_name
78	customer_note
79	created_at
80	updated_at
81	total_item_count
82	shipping_incl_tax
83	base_shipping_incl_tax
84	coupon_rule_name

© Optimizely 2022

After the transfer to Optimizely Campaign, the individual parameters in the recipient list field of your transaction recipient list are separated by a *semicolon*. If multiple products are transferred, the individual products are separated by a *line break*. The string written in the recipient list field corresponds to the structure of a table that is saved in the *CSV format*.

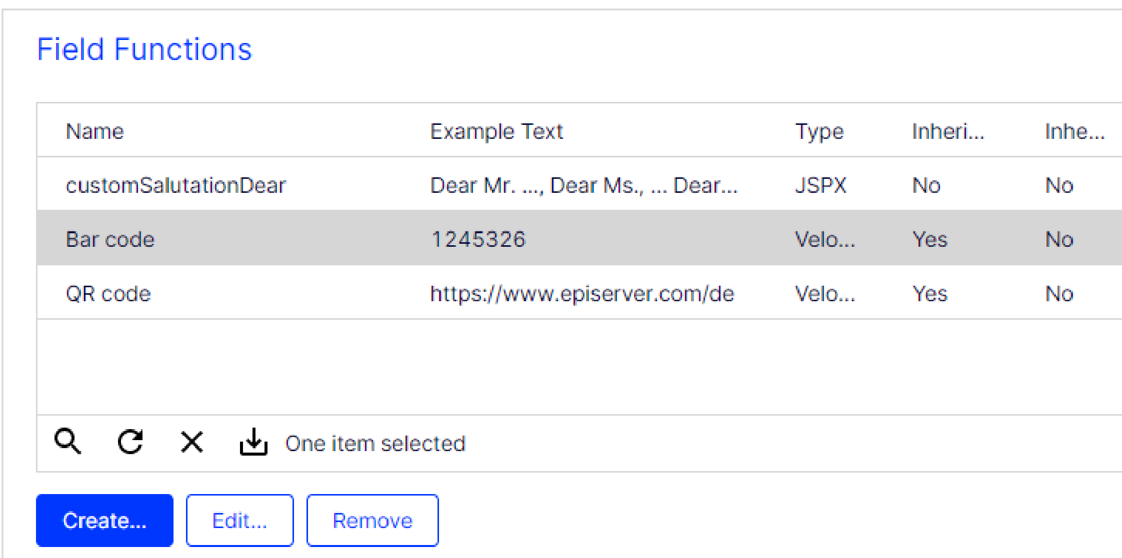
Creating a special field function for order data

If you want to use *order data* in a transactional mail, you must create a new **special field** function in your Optimizely Campaign client. This must use the template engine of Optimizely Campaign to transfer the string to HTML, as described in the following.

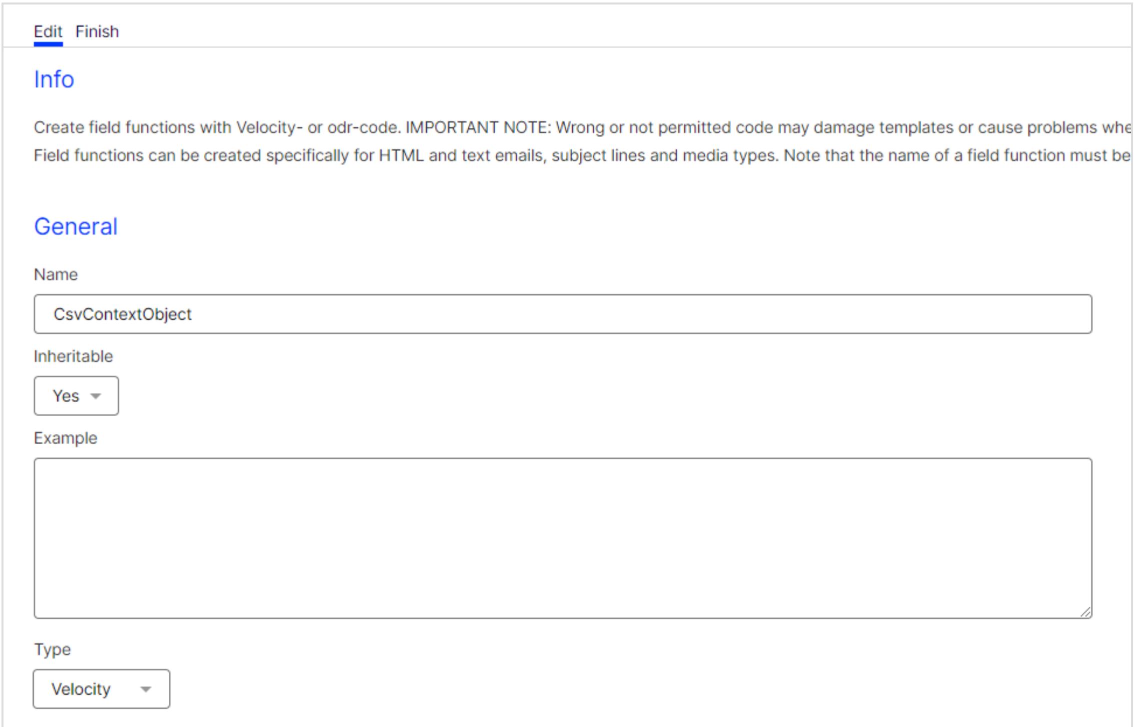
1. Open the Optimizely Campaign menu and select **Administration** > **Field Functions**.

   > **Tip:** If the **Field functions** menu item is not available in your client, contact customer support.

2. Click **Add**.



3. Under **General**, in the **Name** box, add a concise name for the new field function, for example **CSVOrderObjects**.



4. In the **Type** drop-down list, select **Velocity**.
5. In the **Content** area > **Default replacement** tab > **Default replacement** box, enter the following code:

```
<table>
<tr>
  <td>Product ID</td><td>SKU</td><td>Name</td><td>Quantity</td>
  <td>Price</td>
</tr>
#set ("csvContent = "csv.readFromString("user.data.order_positions_csv))
#foreach("row in "csvContent)
<tr>
#foreach("item in "row)
  <td> "item </td>
#end
</tr>
#end
</table>
```

6. Click **Save**.

   Insert the field function at the desired location in the Optimizely Campaign template. When the transactional mail is sent and the recipient list field **order_positions_csv** contains a CSV context object, a simple HTML table is displayed in the sent transactional mail.

   > **Note:** See Field functions how to customize the layout of the table as desired (HTML knowledge is required).

Configuring transactional mails via SMTP API

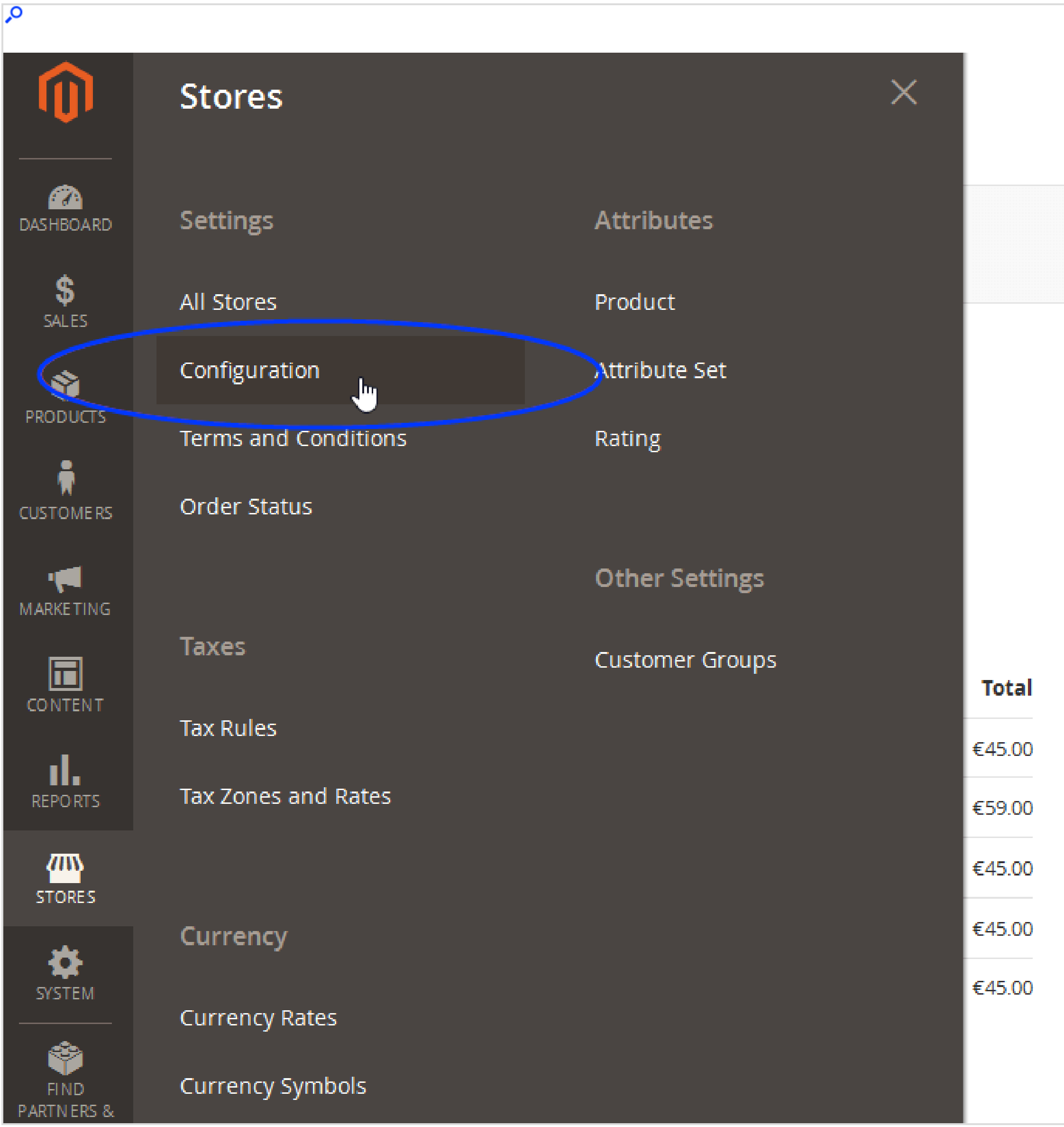
> **Note:** This topic is for administrators and developers with administration access rights in Magento 2.

This topic describes how to configure sending of transactional mails via SMTP API with Magento 2. For transactional mails via the HTTP API, see Transactional mails via HTTP API.

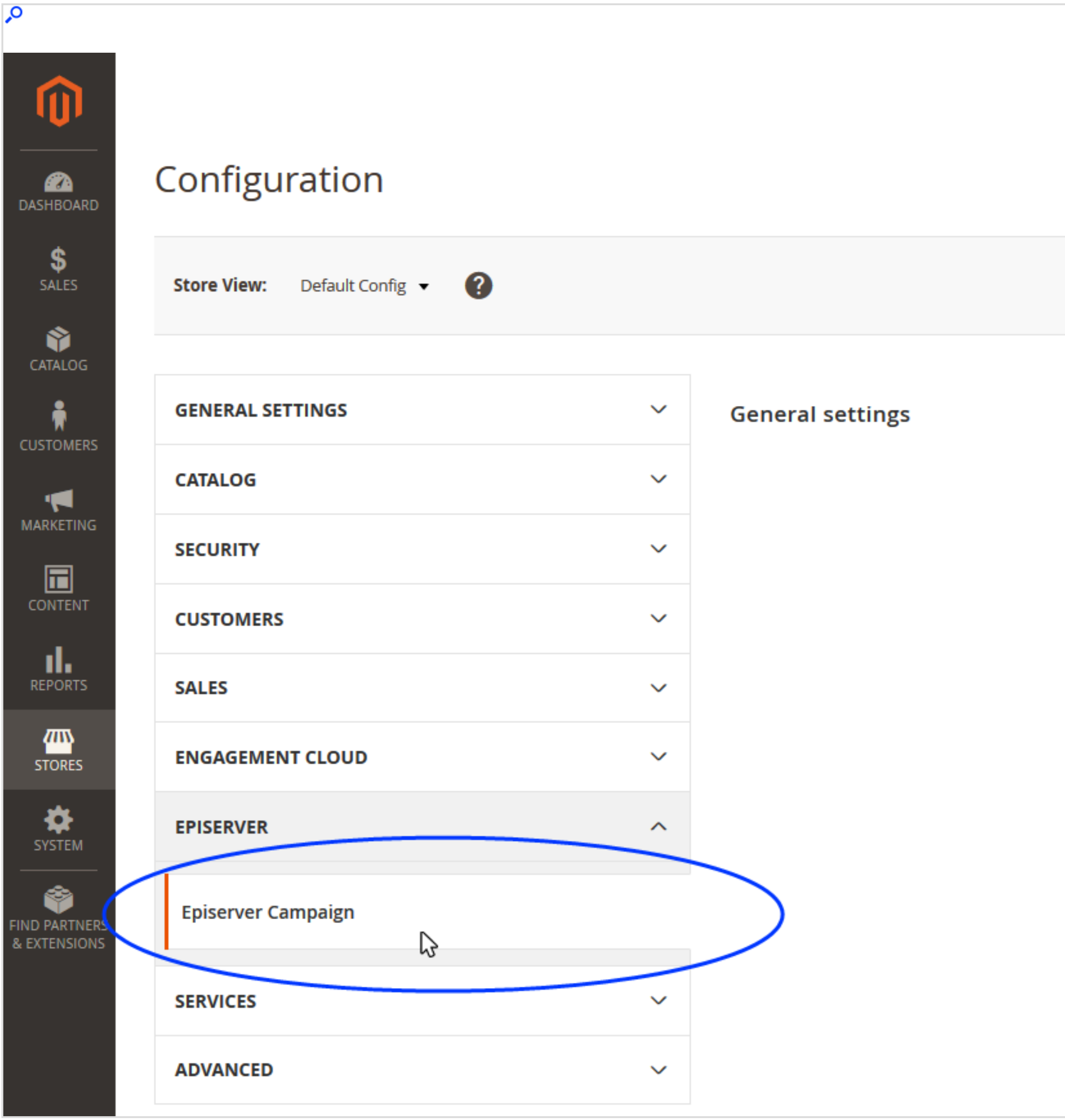
Prerequisites: You need an SMTP API user account for the SMTP connection between Optimizely Campaign and your shop. To set up the account, contact customer support. You will receive a user name and password for the SMTP API.

To configure transactional mails via SMTP API, do the following:

1. Log in to Magento 2 with administrator rights.
2. Select **Stores** > **Configuration**.

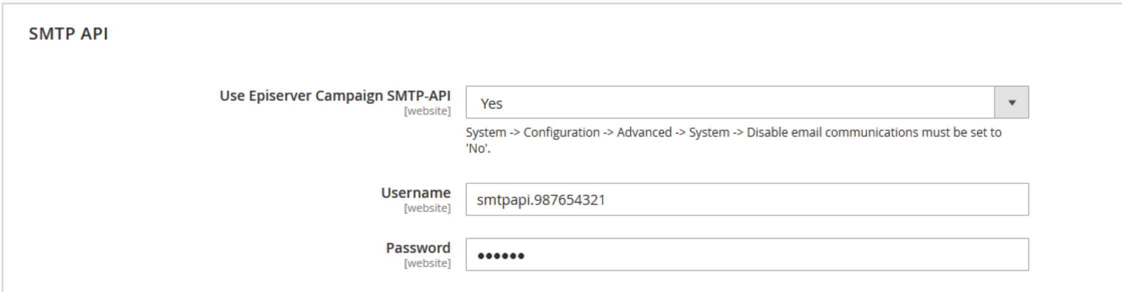


3. Select **Episerver** > **Episerver Campaign**.



4. In the **SMTP API** area:

- **Use Episerver Campaign SMTP API**. Select **Yes**.
- **Username**. Enter your SMTP API user name.
- **Password**. Enter your SMTP API password.



5. Save your changes.

Configuring the catalog export

> **Note:** This topic is for administrators and developers with administration access rights in Magento 2.

This topic describes how to configure the catalog export, when using Magento 2 as e-commerce platform with Optimizely Campaign. You can for example transfer promotional texts and product images, and use this data in your newsletters. See Content interface paragraph.

The Magento 2 integration exports your catalog into a CSV file (comma-separated values), and automatically transfers the catalog to the Optimizely server via a secure SFTP connection at specific time intervals.

Prerequisites

You need an **SSH key pair** and an **SFTP user account** to set up a secure connection.

Creating an SSH key pair

Follow these instructions to create a key pair:

- FTP access via SCP for Windows
- FTP access via SCP for MacOS/OS X

Requesting an SFTP user account

When you have created the key pair, do the following to request a user account:

1. Contact customer support. Providing the name of the CSV file with your product catalog.
2. Email your public key (the file with the **.pub** extension) to customer support.
3. Send your key fingerprint in a *separate* email to customer support.

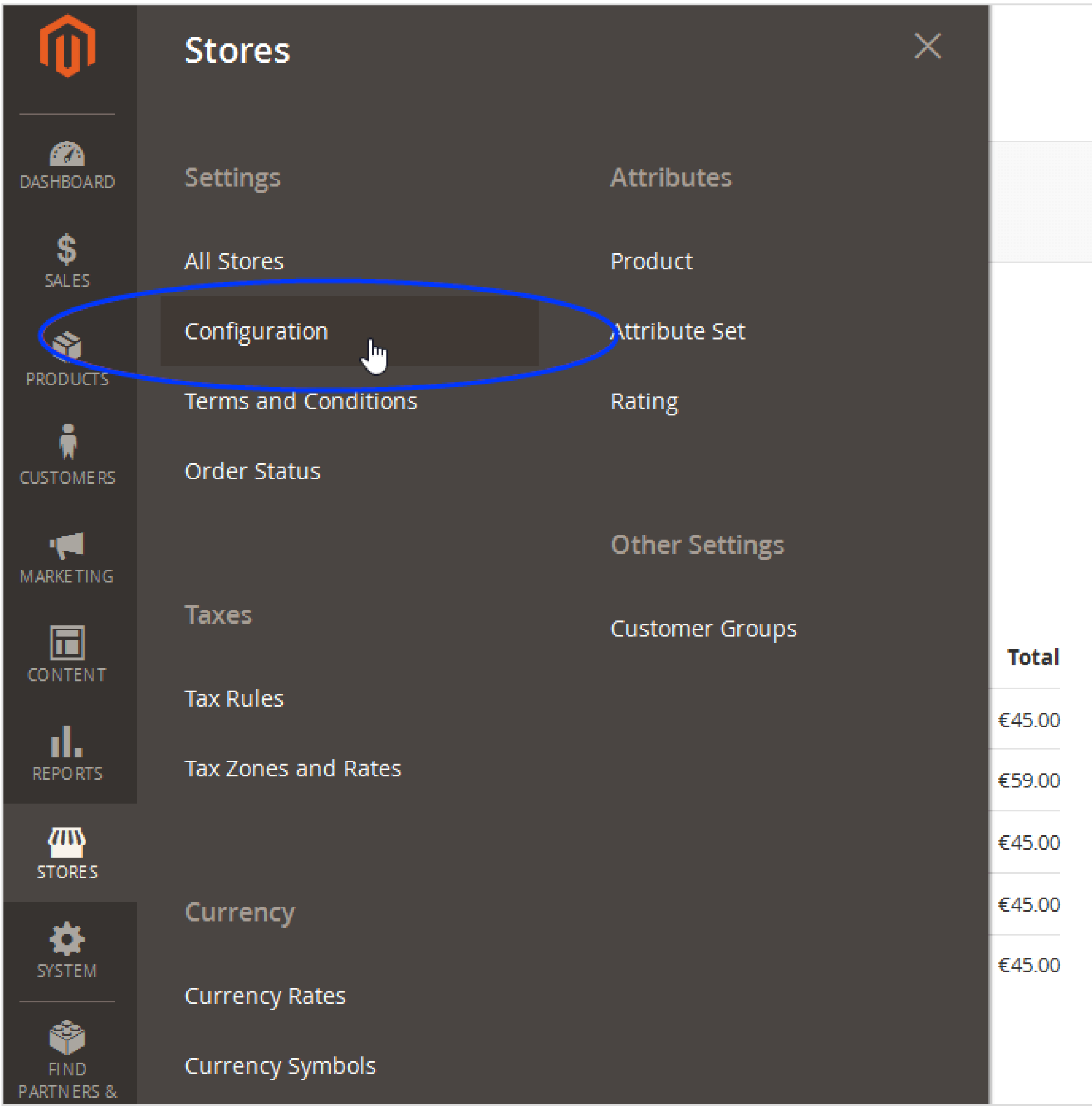
> **Note:** For security reasons, always send your public key and key fingerprint in two separate emails.

When your account is configured, you receive your user account information by email.

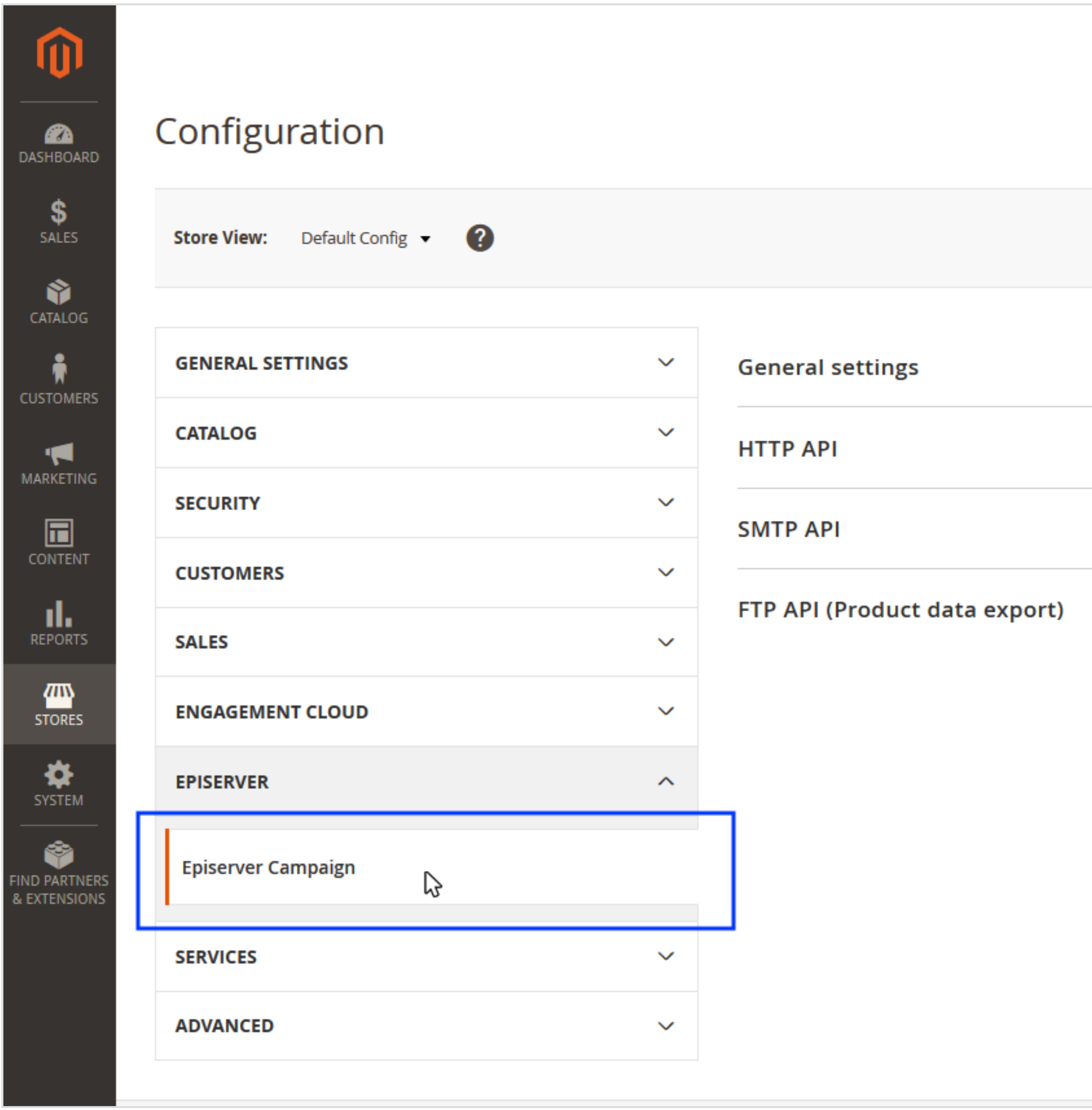
Activating the catalog export in Magento 2

In the following steps, you activate the catalog export and save your private SSH key.

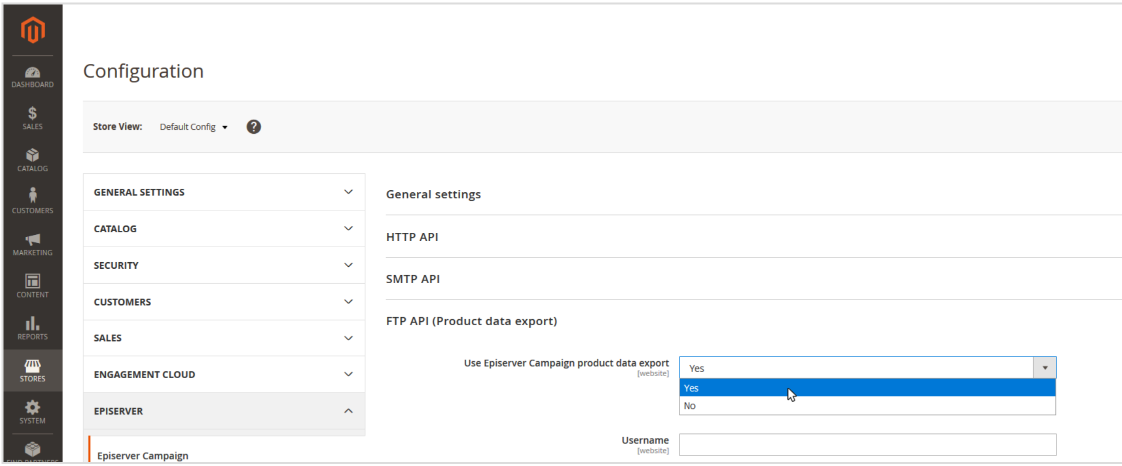
1. Log in to Magento 2 with administrator rights.
2. Go to **Stores** > **Configuration** in the menu bar on the left.



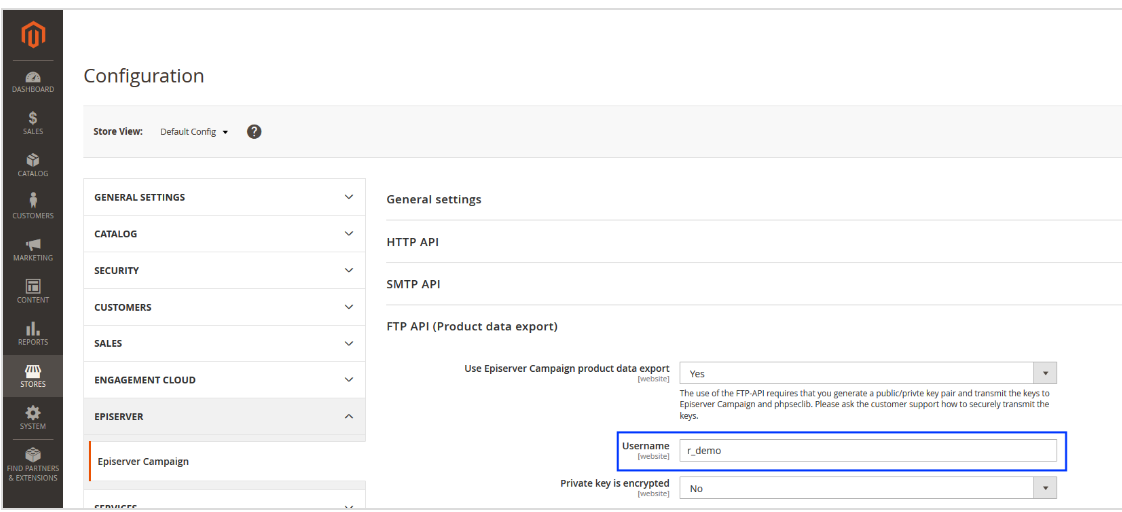
3. In the left pane, select **Episerver** > **Episerver Campaign**.



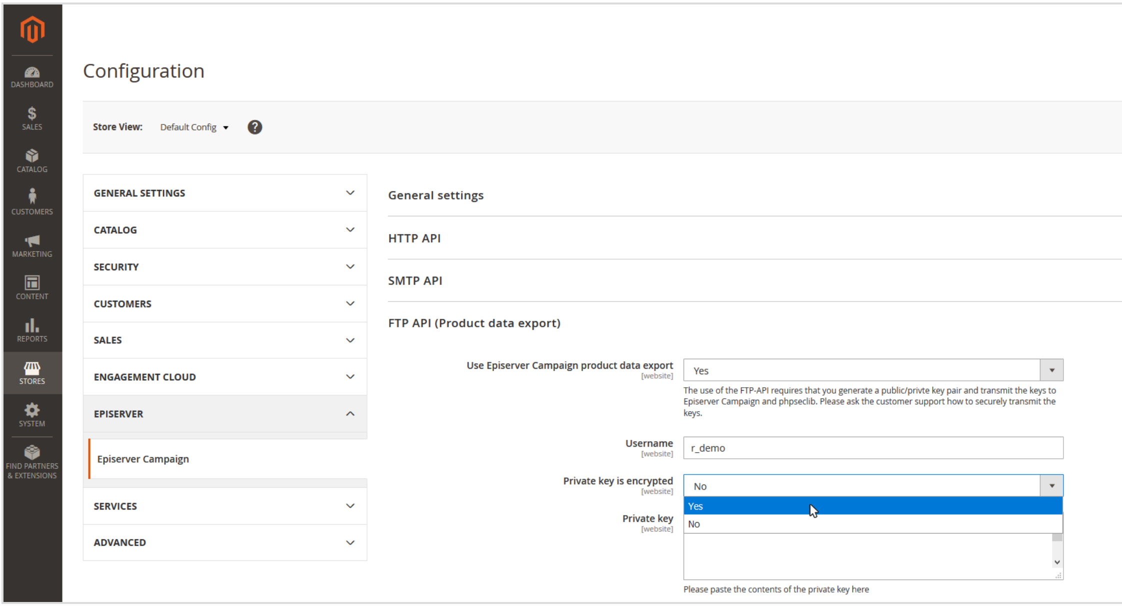
4. In the **FTP API (Product data export)** area, in the **Use Episerver Campaign product data export** drop-down list, select **Yes**.



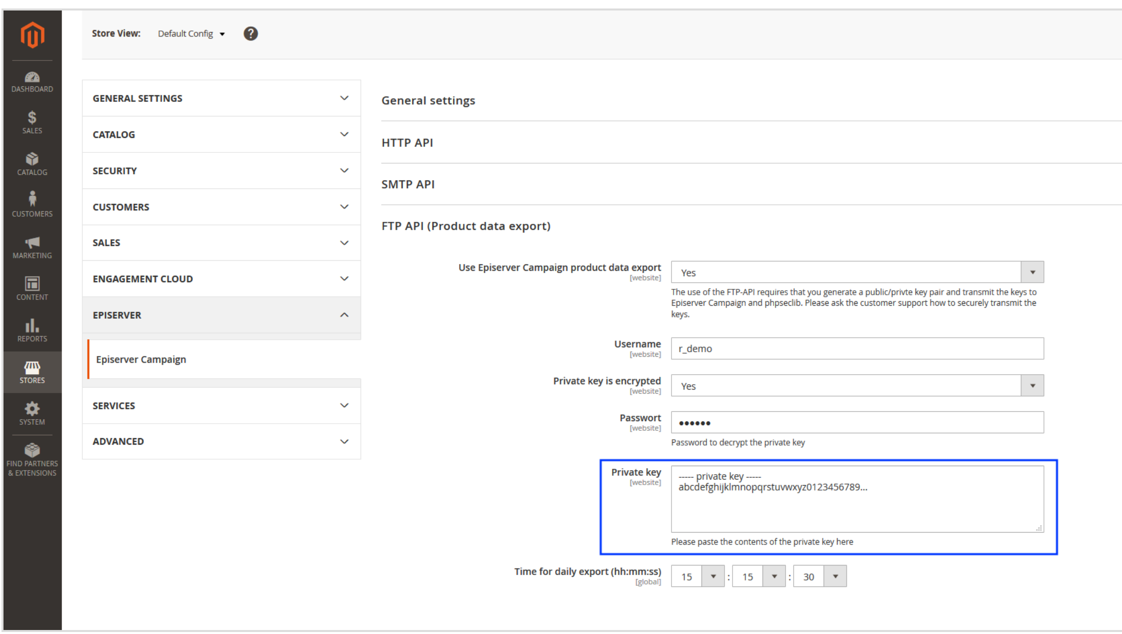
5. In the **Username** box, enter the user name of your SFTP user account.



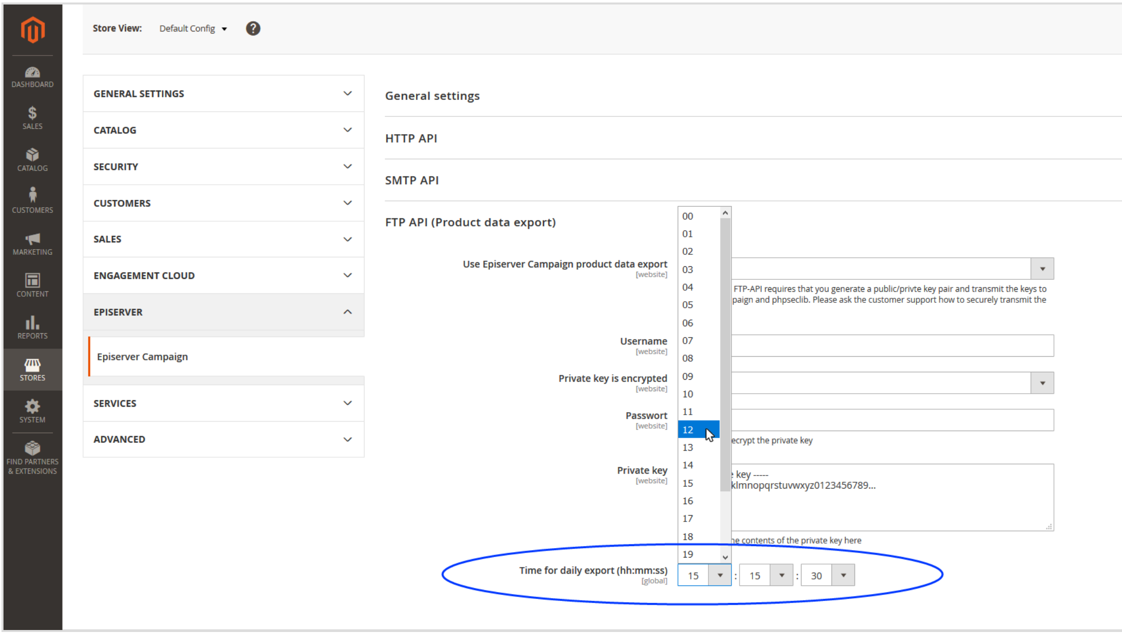
6. If you want to protect your SSH key with a password, select **Yes** in the **Private key is encrypted** drop-down list, and add a password in the **Password** box.



7. In the **Private key** box, enter your private key.



8. Under **Time for daily export (hh:mm:ss)**, select the time your product catalog should be exported.



9. Save your changes.

> **Note:** Coded values (Client ID, Private key) must be entered anew with each saving process. Otherwise the coded value is coded anew.

> **Note:** The product catalog export fails if the **Cron Jobs functionality** is incorrectly configured in Magento 2. This functionality is part of the standard installation. See the Magento 2 documentation for details.

Configuring shops and adapting messages

> **Note:** This topic is for administrators and developers with administration access rights in Magento 2.

This topic describes how to configure shops, connect templates and clients, and adapt front-end messages, when using Magento 2 as e-commerce platform with Optimizely Campaign. You can set up a specific client in Optimizely Campaign that is only used for sending transactional mails.

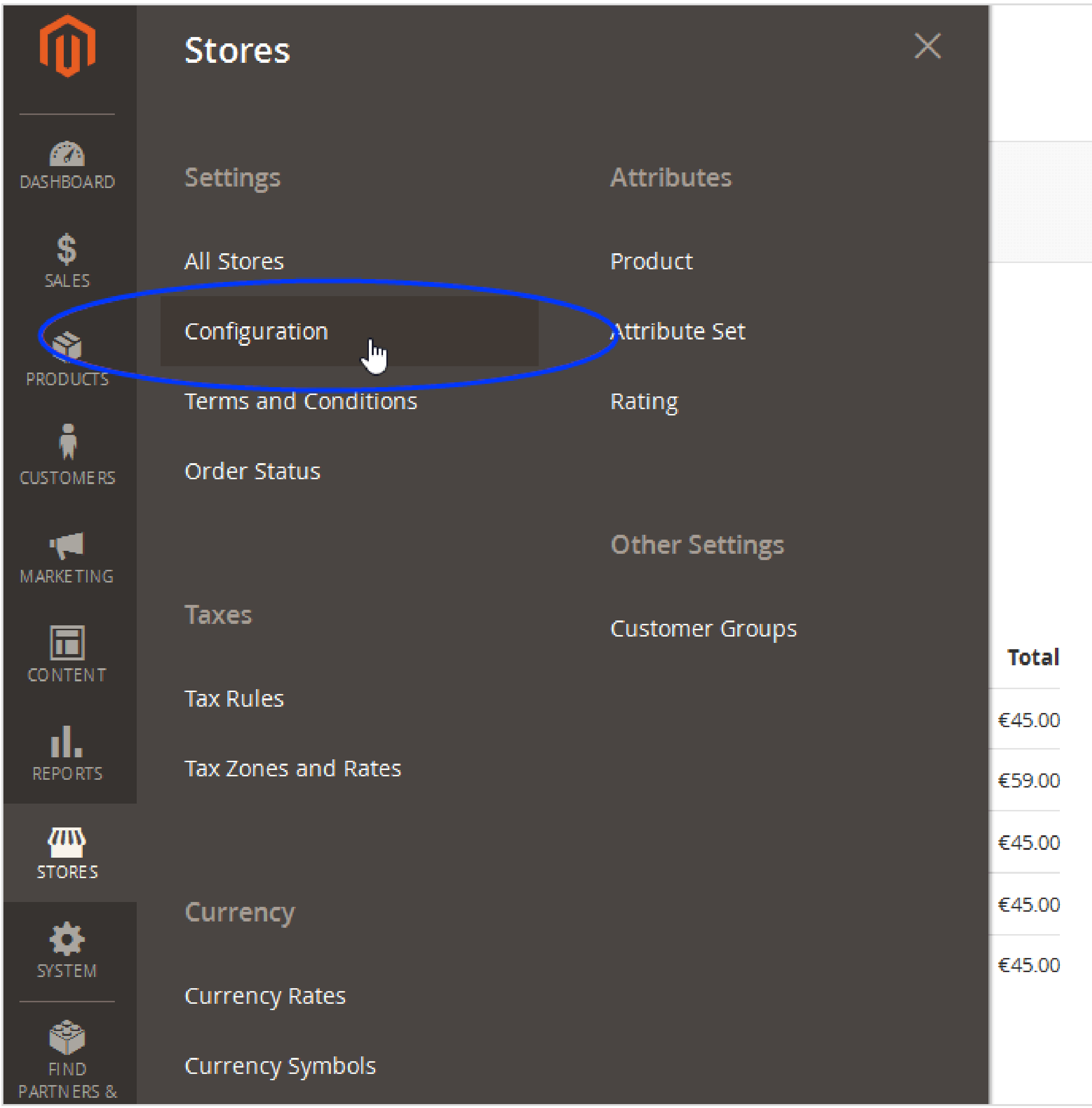
Configuring multiple shops individually

The settings for the "Default" shop will also apply to other shops set up in a Magento 2 installation. However, the Magento 2 integration lets you connect multiple shops and store views individually with different templates and different clients in Optimizely Campaign. For example, this lets you run multi-language shops and send order or newsletter subscription confirmations in the individual language of the recipient.

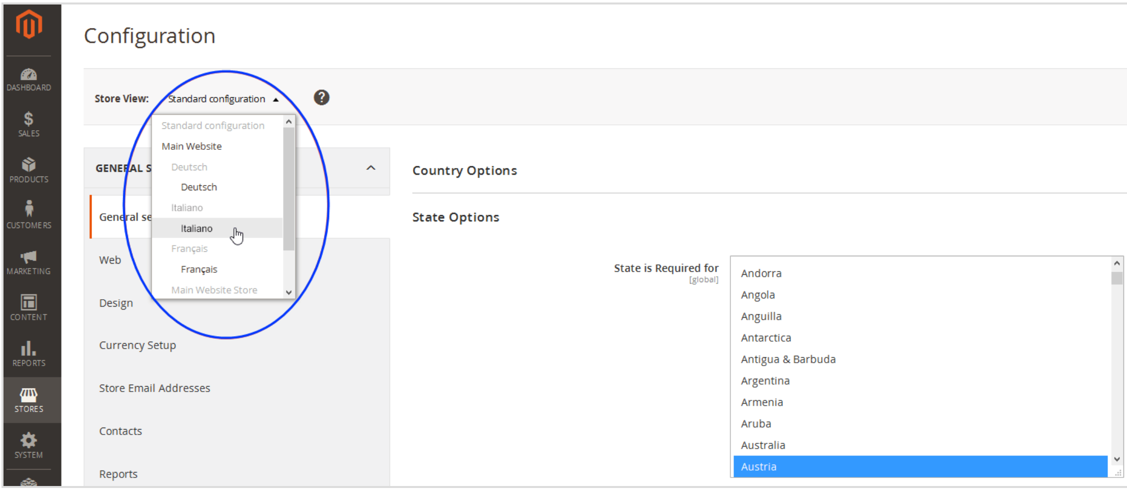
Do the following to configure this:

© Optimizely 2022

1. Log in to Magento 2 with administrator rights.
2. Go to **Stores** > **Configuration** via the menu bar on the left.

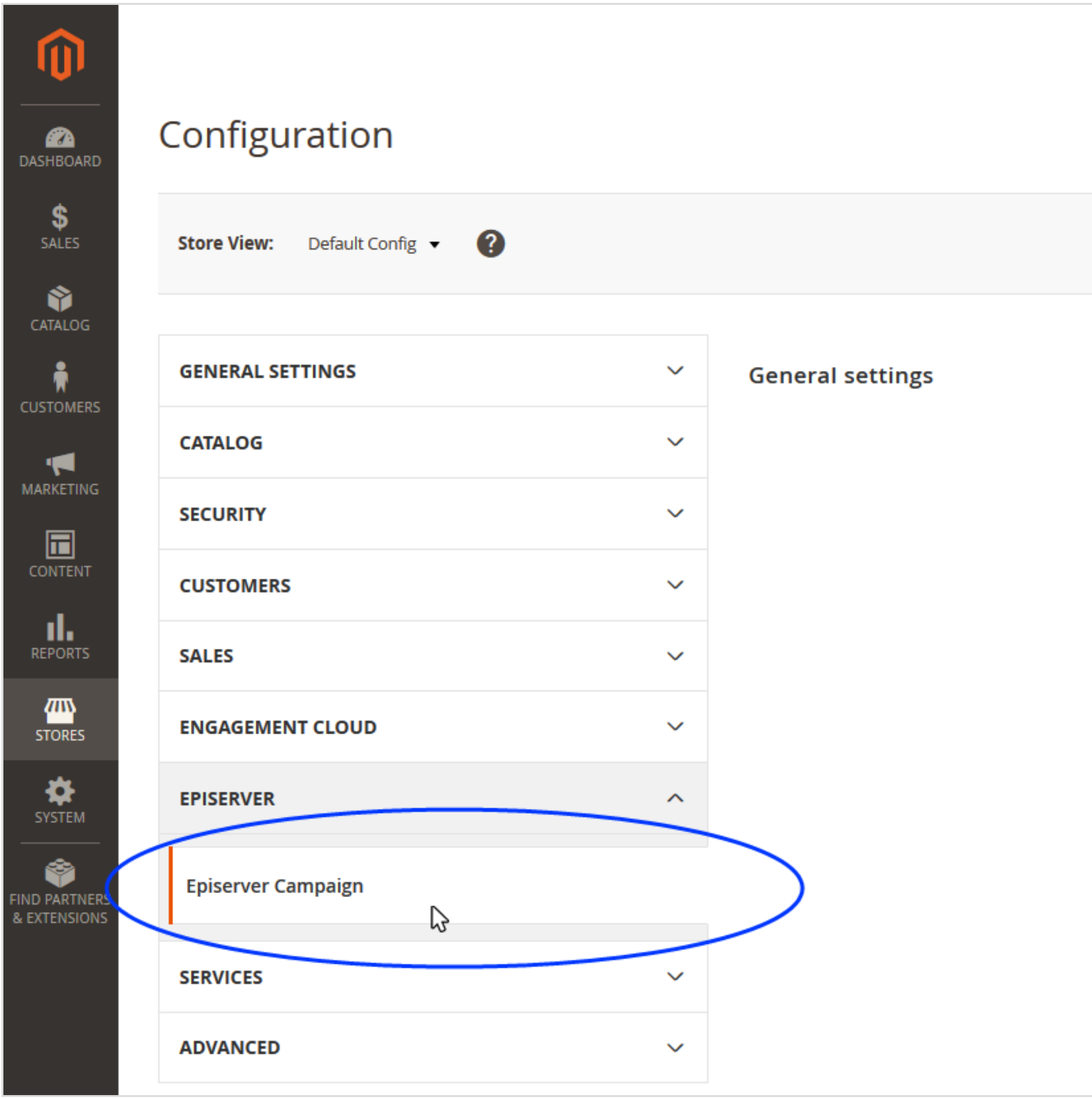


3. From the drop-down list under **Store View**, select the shop/store view you want to configure. Confirm your selection.

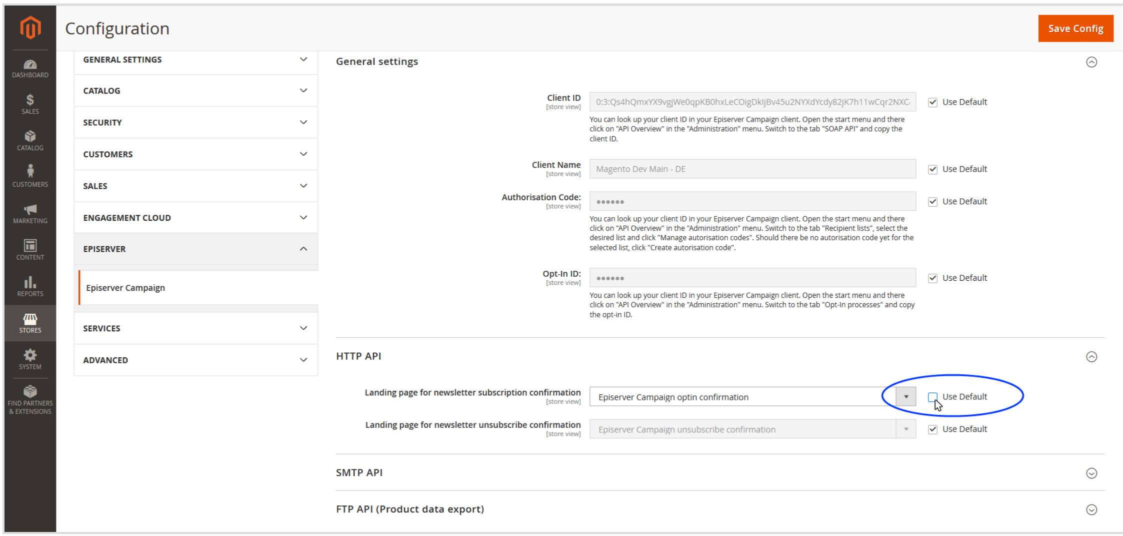

Configuration
Store View:
Standard configuration
Standard configuration
Main Website
Deutsch
Deutsch
Italiano
Italiano
Français
Français
Main Website Store
GENERAL S
General se
Web
Design
Currency Setup
Store Email Addresses
Contacts
Reports
Country Options
State Options
State is Required for
[global]
Andorra
Angola
Anguilla
Antarctica
Antigua & Barbuda
Argentina
Armenia
Aruba
Australia
Austria
DASHBOARD
SALES
PRODUCTS
CUSTOMERS
MARKETING
CONTENT
REPORTS
STORES
SYSTEM

4. Click **OK**.

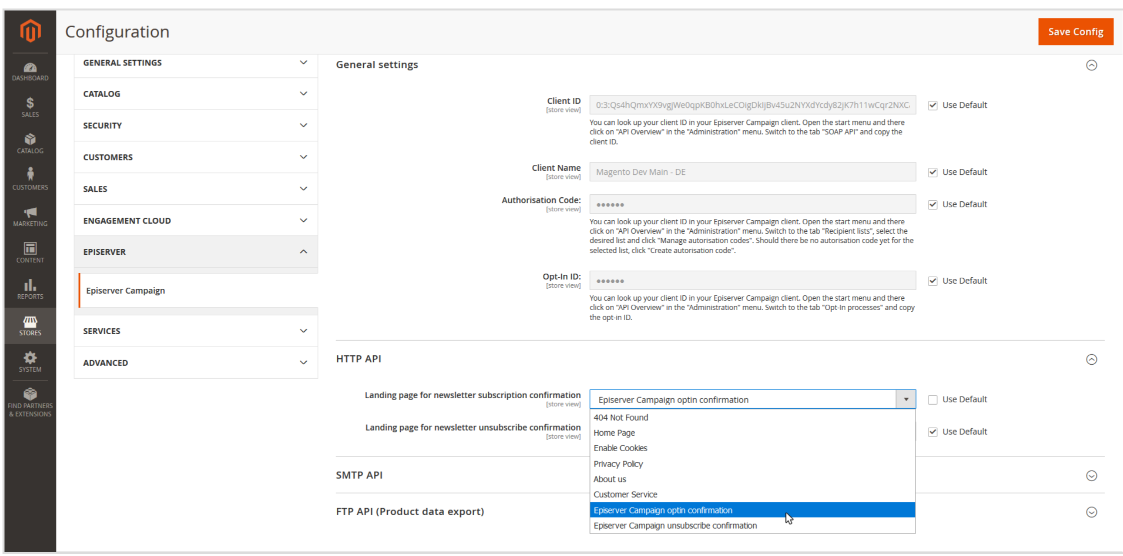
5. In the left pane, click **Episerver** > **Episerver Campaign**.



6. Clear the check boxes for the configurations that you want to change for the store. The grayed entry is activated and can be edited.



7. Change the configuration.



Note: To send out newsletter registration confirmations or transactional mails in other languages, you must first create these in their respective language. See Configuring the newsletter and Transactional mails via HTTP API.

8. Save your changes.

Adapting front end messages

To translate or change front end messages displayed to website visitors, for example when logging in, you can edit the integration text files. Front end messages are located in the directory **src/i18n**. The files are simple text files that follow the Magento 2 standard.

> **Tip:** Install and test the Magento 2 integration on a test or staging system before you use it in production. If you are planning a test phase, report the URLs of the test system to customer support, to reference the subscribe and unsubscribe links during the test phase.

Troubleshooting

> **Note:** This topic is for administrators and developers with administration access rights in Magento 2.

This topic describes how to manage integrated-related issues when using Magento 2 as e-commerce platform with Optimizely Campaign, how to get help with problems during installation and configuration, and how to activate error logging, and known issues.

Installation issues

If problems occur during the installation and configuration of Magento 2 integration, contact customer support and provide the following information:

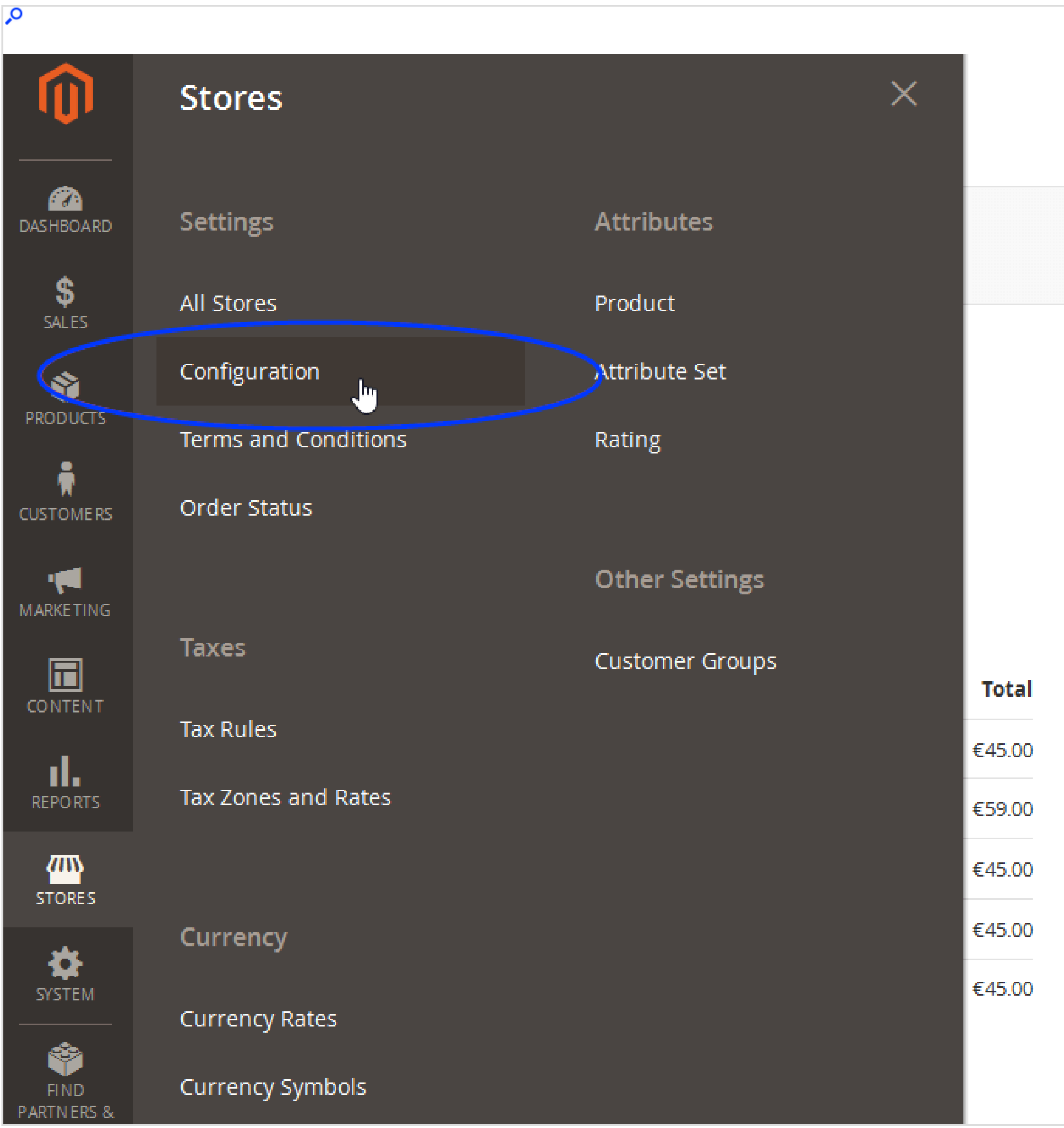
- The version number of the Magento 2 system you are using.
- The output of the command `phpinfo()`.
- A description of when and in what context the error occurred.

> **Note:** Conflicts may occur with other expansion modules for Magento 2. If you cannot determine, limit, or resolve the conflicts, provide Optimizely with a list of the modules you use.

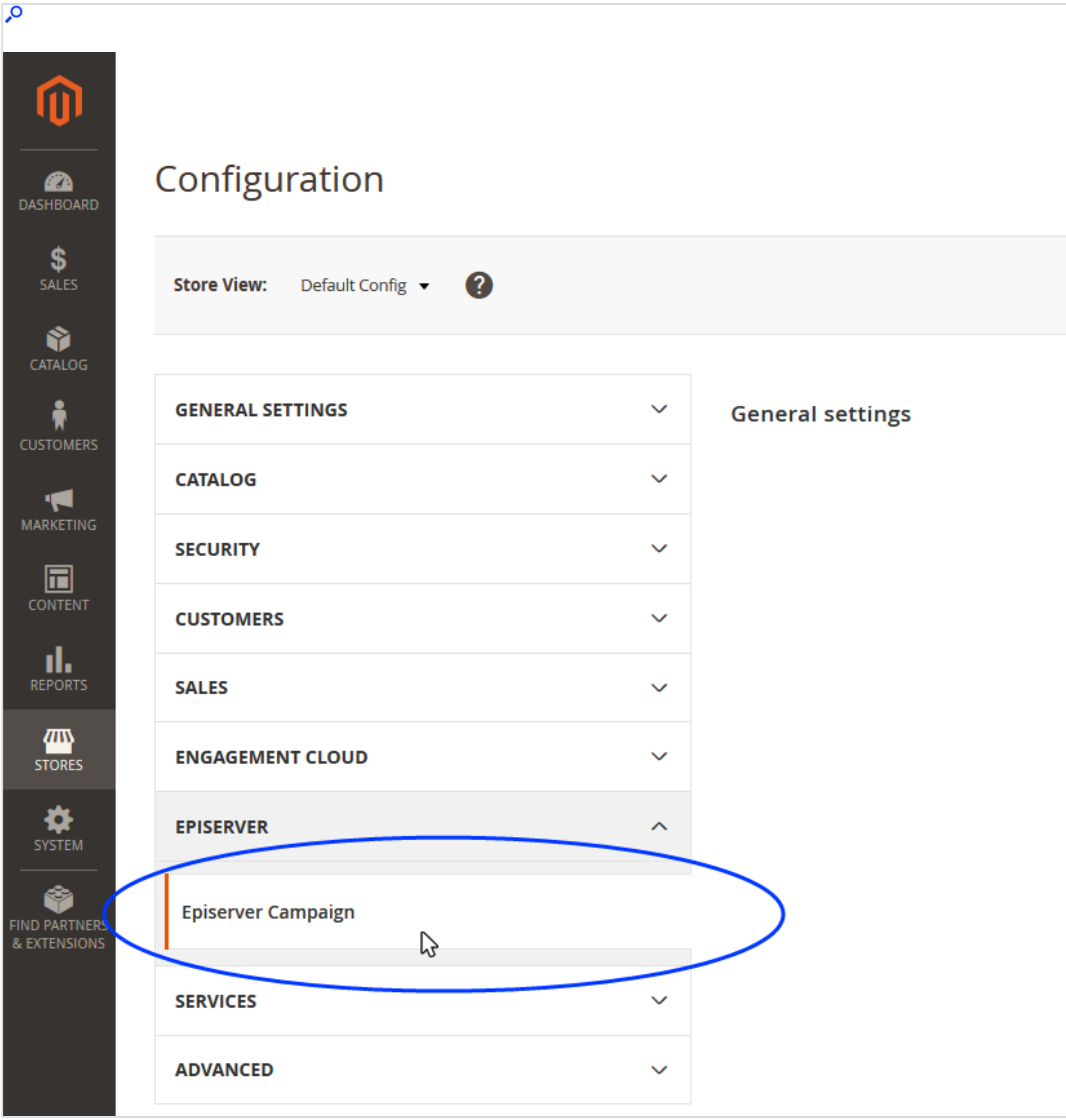
Activating error logging

Error logging displays operating status of the integration and any errors that occurred.

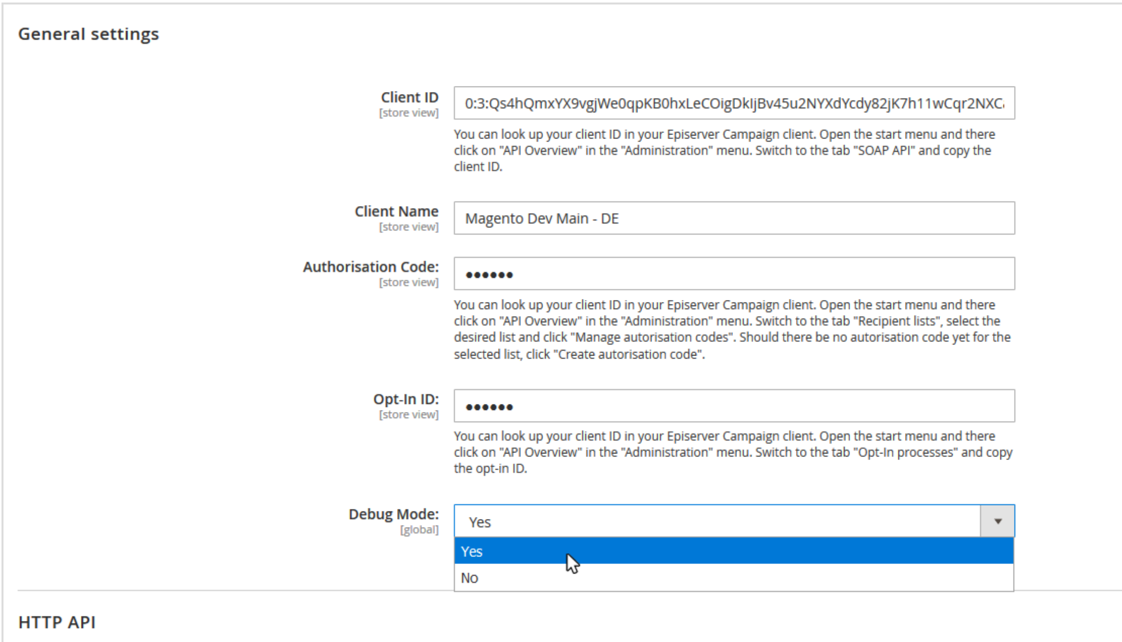
1. Log in to Magento 2 with administrator rights.
2. Select **Stores** > **Configuration**.



3. Select **Episerver** > **Episerver Campaign**.



4. In the **General settings** area, in the **Debug Mode** drop-down list, select **Yes**.



5. Click **Save Config**.

The Magento 2 integration saves errors in the `var/log/optivo_broadmail.debug.log` file. If you cannot fix a problem yourself, send the lines that were recorded after the error occurred to customer support.

Entries in the error log have the following structure:

```
[2017-06-30 10:25:03] optivoLogger.DEBUG: processFallbackQueue:start [] []
[2017-06-30 10:25:03] optivoLogger.DEBUG: processFallbackQueue:maxRetries 10 []
[]
[2017-06-30 10:25:03] optivoLogger.DEBUG: processFallbackQueue:process 1 entries
[] []
 ...
[2017-06-30 10:25:03] optivoLogger.DEBUG: _checkResponse [] []
[2017-06-30 10:25:03] optivoLogger.DEBUG: a:7:{s:8:"response";s:207:"HTTP/1.0 404
Not Found
```

Known issues

The following errors in Magento 2 can affect the Optimizely Campaign integration:

Problem	Possible cause	Solution
Version 2.1.0. In the back end (under **Customer Information** in the tab **Newsletter**), you cannot unsubscribe customers by clearing the **Subscribed to Newsletter** check box.	Documented Magento 2 error.	Unsubscribe customers via **Marketing** > **Newsletter Subscribers** by deleting the corresponding customer from the list.
Versions 2.0.7 and 2.1.0. • At checkout, the customer cannot specify a new default address or change their address. • If customers have not stored an address in their customer account, they can create a new address at the checkout. This is, however, committed as a shipping address and not as a billing address – despite the existing option to use the same address for billing and shipping. Both errors affect the correct transfer of address information of the customer into transactional mails.	Currently unknown.	No solution currently available.
All versions. Magento displays the message *You have registered for the newsletter* on the confirmation page only after a delay.	Error in the Magento 2 system, not an error in the Magento 2 integration from Optimizely Campaign.	No solution currently available.

Shopware integration

> **Note:** This topic is for administrators and developers with administration access rights in Shopware.

This topic gives you an overview of the Shopware integration with Optimizely Campaign. With the Shopware integration, customers can subscribe and unsubscribe to newsletters directly in your shop. The integration transfers customer data received during registration to Optimizely Campaign so that you can use the information to personalize emails.

You can also automatically send transactional mails like order confirmations and invoices. When registered customers change their data in the shop, customer data is synchronized. The integration also lets you transfer the product catalog to Optimizely Campaign daily and supports the connection of multiple shops.

You get the following features on Shopware Professional, Professional Plus and Enterprise 5.2–5.6:

- Newsletter subscription and unsubscribes
- Transactional mails via HTTP API
- Export product catalogs into Optimizely Campaign

Setting up Shopware integration

To set up the Shopware integration in your client, contact customer support and request the integration software package.

Provide Optimizely with the following information:

- Your Shopware version number.
- The number of desired recipient lists for your newsletter recipients.

  > **Note:** The structure and fields of newsletter recipient lists are determined by Shopware and cannot be customized.

- For transactional mails, Optimizely sets up a separate customizable transaction recipient list. Provide Optimizely with the desired structure and the names of these fields.
- For product catalog export to Optimizely Campaign, you need a user account on the Optimizely server. If you do not have a user account, contact customer support. Provide a **public key** and a **key fingerprint** to securely transfer the data. See .
- If you are running multiple shops (including sub-shops and shops that are localized in other languages), provide Optimizely with the number of shops you want to connect to; see Advanced configuration.

If you are integrating multiple shops, you may need:

- Separate clients for the individual shops.
- A separate client for your transactional mails.
- Setup of a recipient-list-based newsletter subscription.

Installation

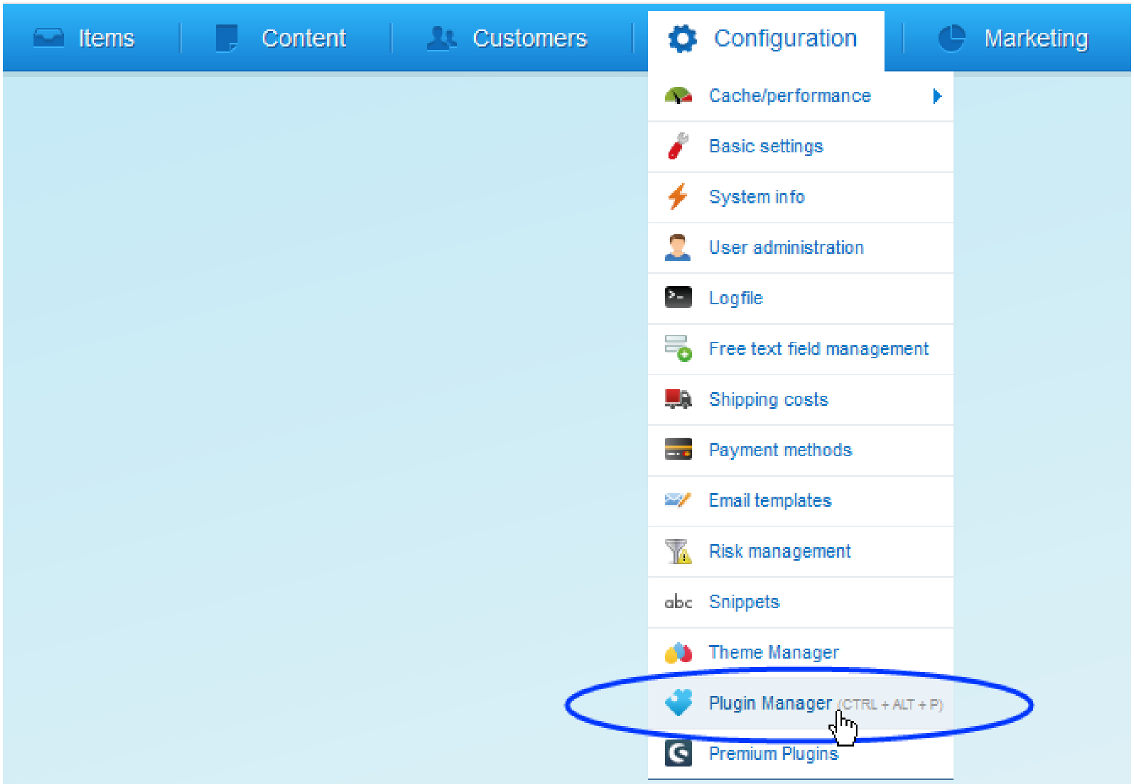
> **Note:** This topic is for administrators and developers with administration access rights in Shopware.

This topic describes how to install the Shopware integration with Optimizely Campaign.

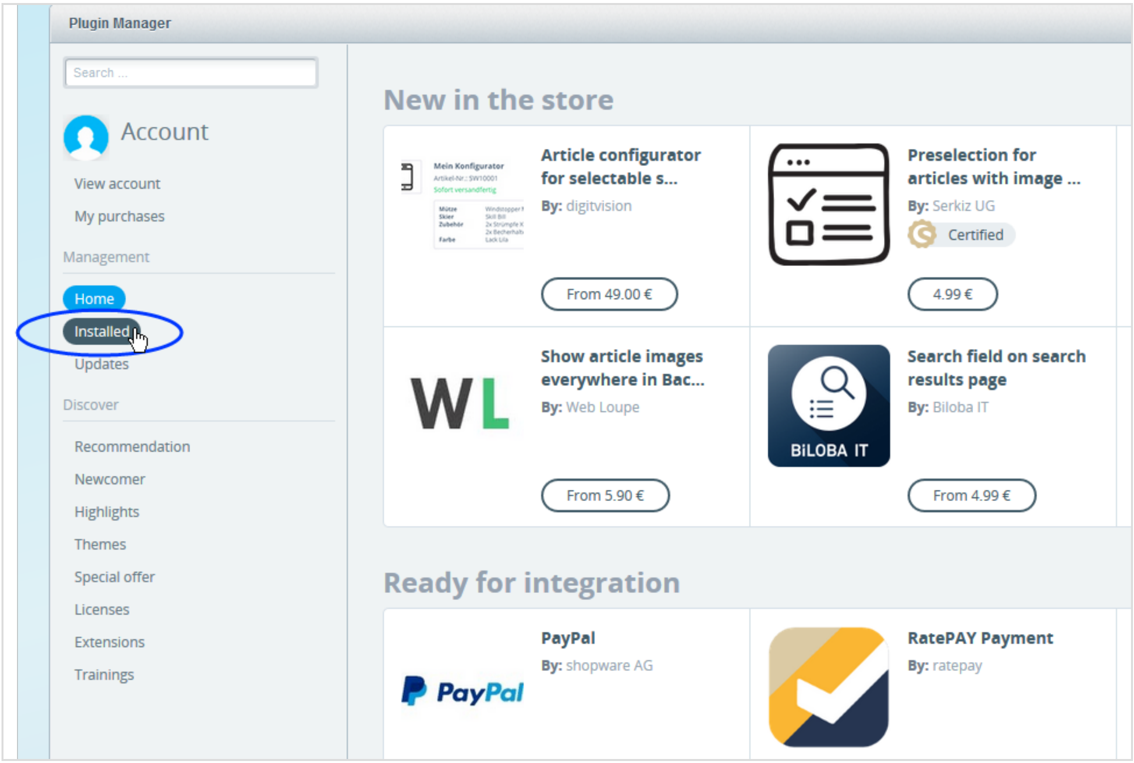
To install the Shopware integration, do the following:

1. After you receive the download link to the software package (ZIP archive) from customer support, download the file and log in to the back-end of Shopware using administrator rights.

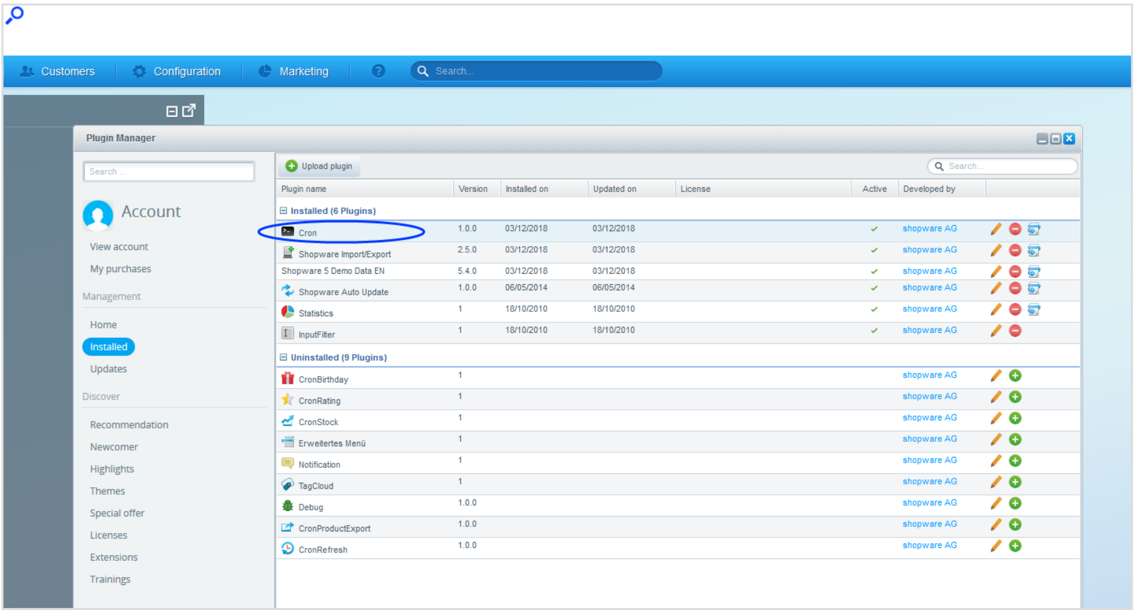
2. Go to **Configuration** > **Plugin Manager**.



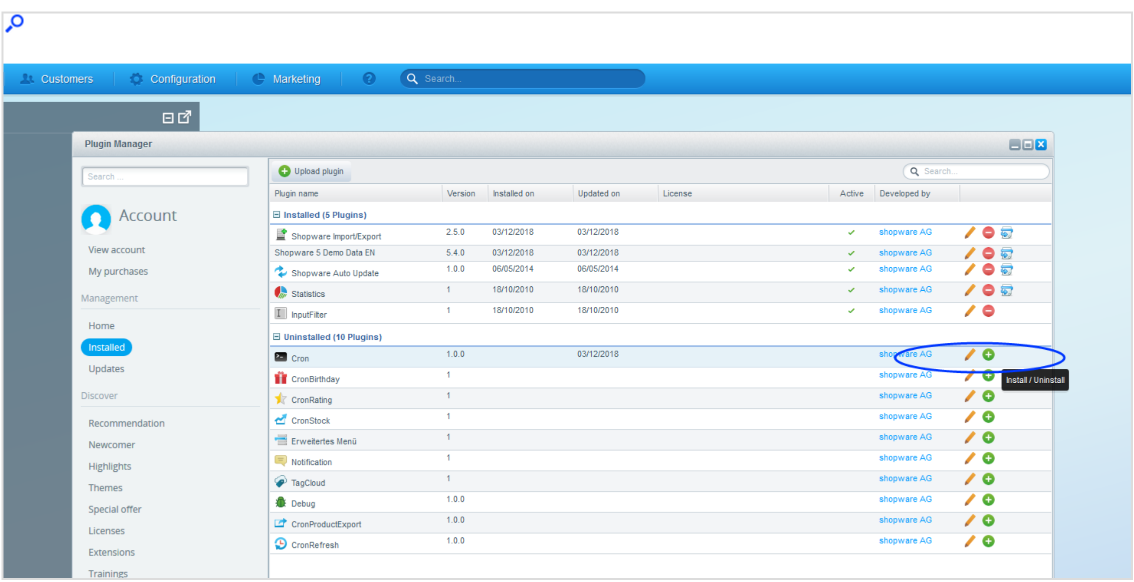
3. Click **Installed**.



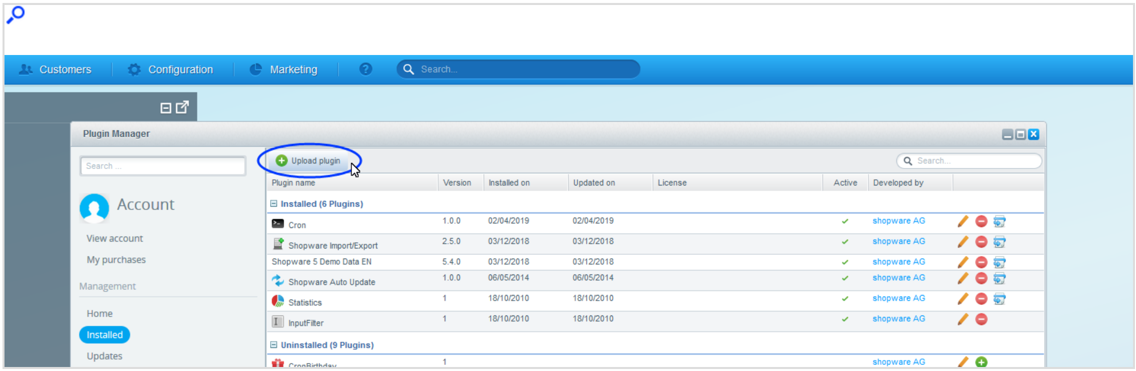
4. Ensure that the **Cron** plug-in is installed.



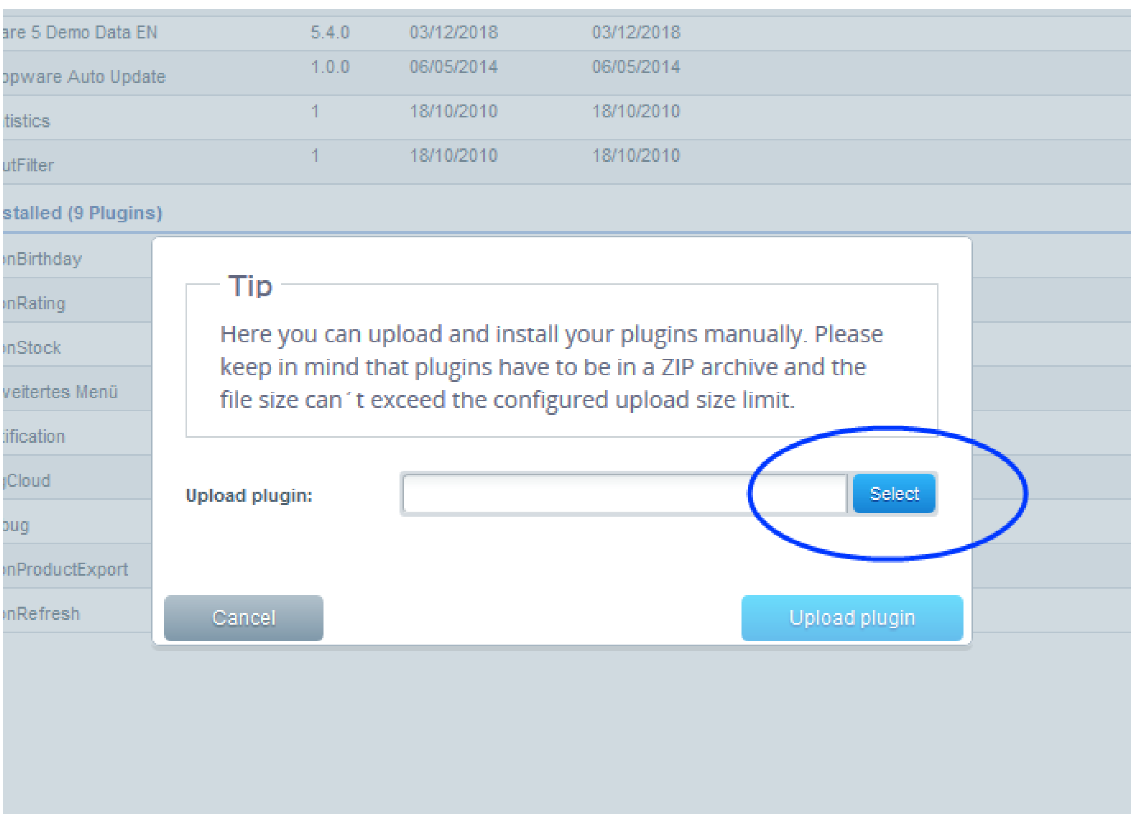
> **Note:** The **Cron** plug-in is included in the standard Shopware installation. If it is not installed, look for the **Cron** plug-in in the **Uninstalled** section, and click **Install** to add it.



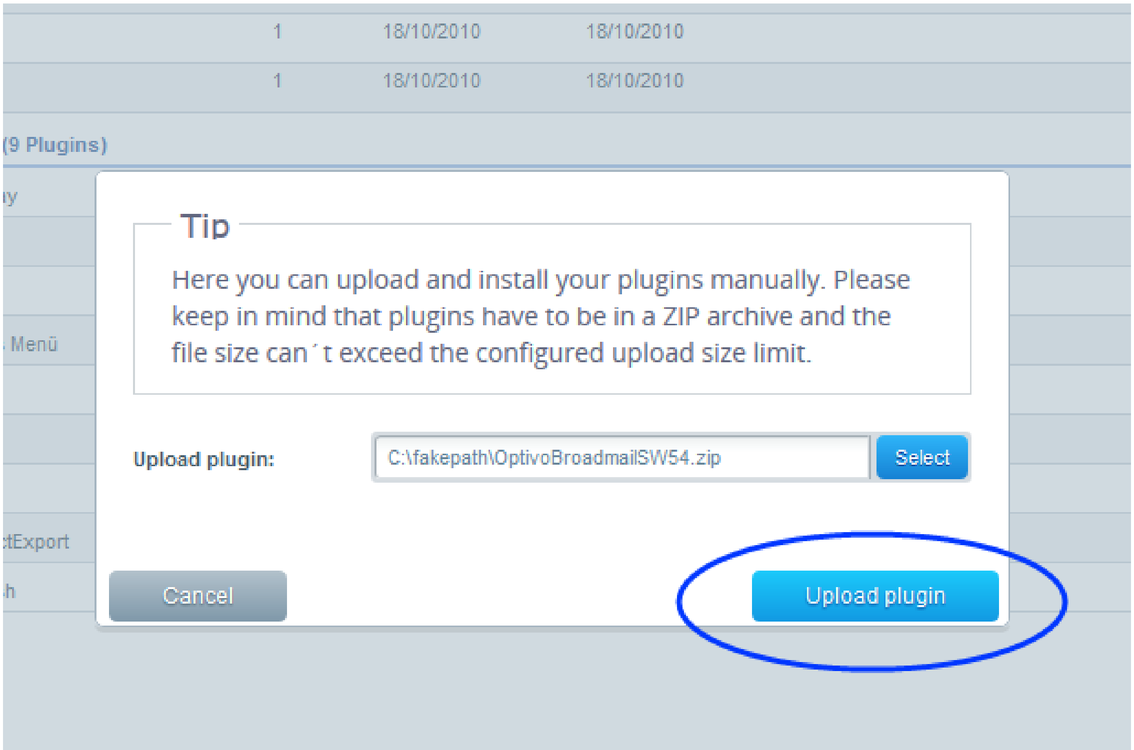
5. Click **Upload plug-in** to upload the Shopware integration.



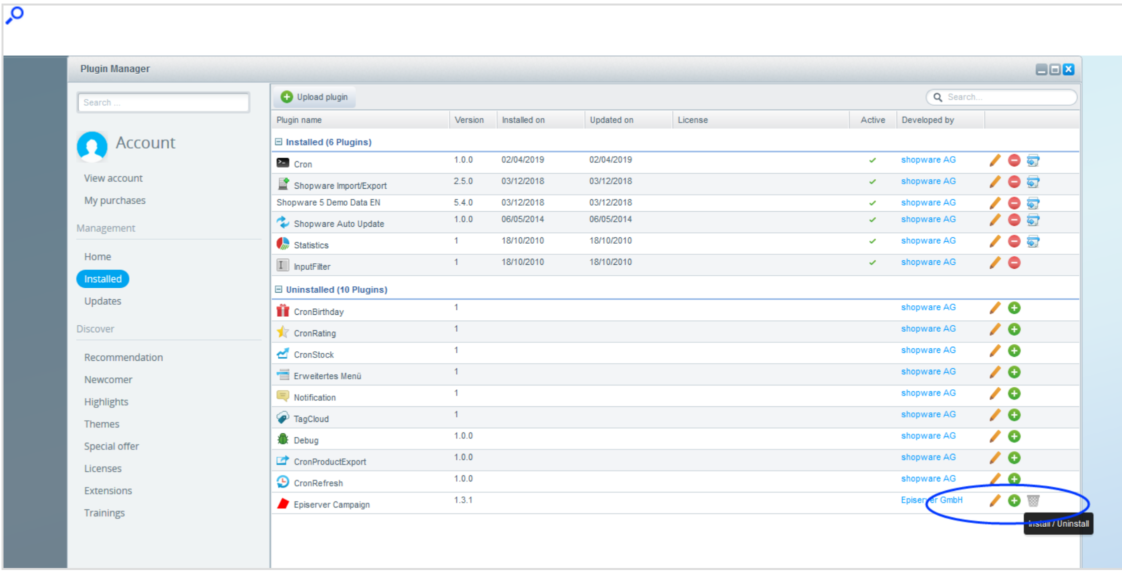
6. Click **Select** and go to the location where you saved the ZIP archive of the Shopware integration.



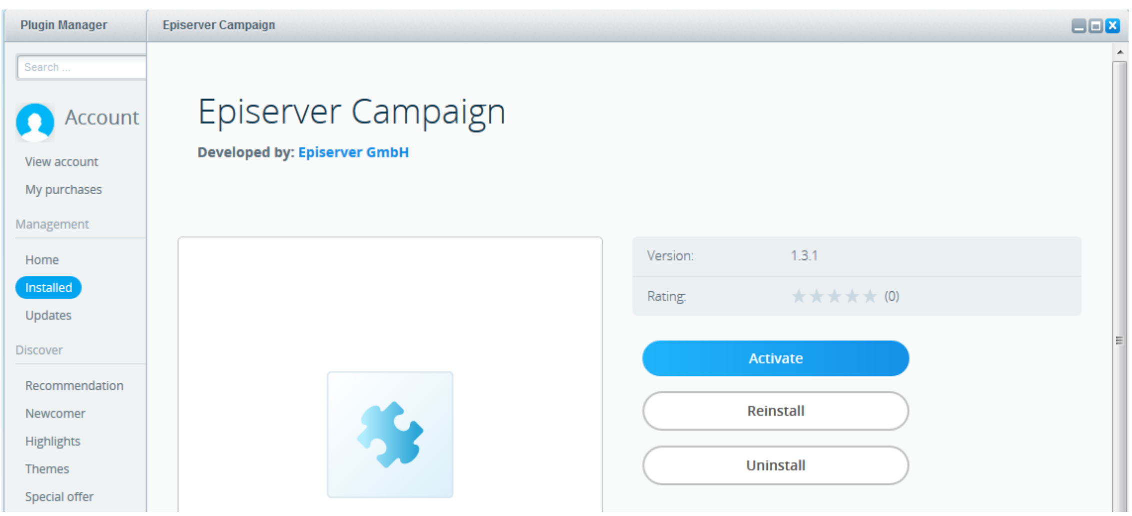
7. Click **Upload plug-in**. When uploaded, the Shopware integration is displayed in the **Uninstalled** section with the name **Episerver Campaign**.



8. Click **Install** to install the integration. The installation begins. You may be asked to clear individual caches. Confirm by clicking **Yes**. When finished, you are asked to activate the integration.

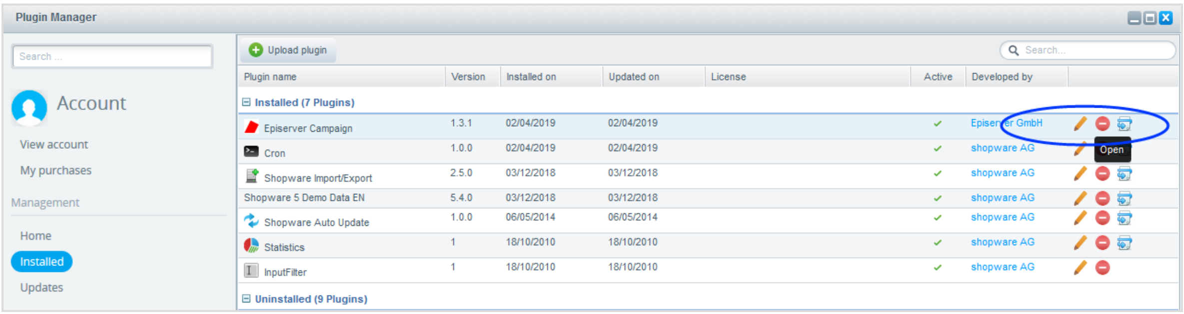


9. Click **Activate**.



When completed, the installation is displayed under the **Installed** section in the **Plugin Manager** window.

> **Note:** To change the installation settings at a later time, click **Edit** in the overview of installed plug-ins.



Installing an update

If you receive an updated version of the Shopware integration from customer support, do the following to delete the old version and install the upgrade:

1. Log in to the back end of Shopware using administrator rights.
2. Go to **Configuration** > **Plugin Manager**.
3. On the left side of the menu bar, click **Installed**.
4. Locate the Shopware integration named **Episerver Campaign** in the Plugin Manager and click **Uninstall** . When completed, the integration appears under **Uninstalled.** During the uninstallation, you are asked if you want to keep the data from the old version. Confirm to retain the data in accordance with your requirements.
5. Click **Delete** to delete the old version, and confirm by clicking **Yes**.
6. Install the new version by following Steps 5–9 in the previous section.

Uninstalling the integration

1. Log in to the back end of Shopware using administrator rights.
2. Go to **Configuration** > **Plugin Manager**.
3. On the left side of the menu bar, click **Installed**.
4. Locate the Shopware integration named **Episerver Campaign** in the Plugin Manager and click **Uninstall** . When completed, the integration appears under **Uninstalled.**
5. Click **Delete** to delete the old version, and confirm by clicking **Yes**.

Configuring subscribes and unsubscribes

> **Note:** This topic is for administrators and developers with administration access rights in Shopware.

This topic describes how to configure the newsletter subscription and unsubscription feature, if you are using Shopware as an e-commerce platform with Optimizely Campaign. The Shopware integration uses standard formulas that contain Shopware for newsletter registration. You cannot add fields.

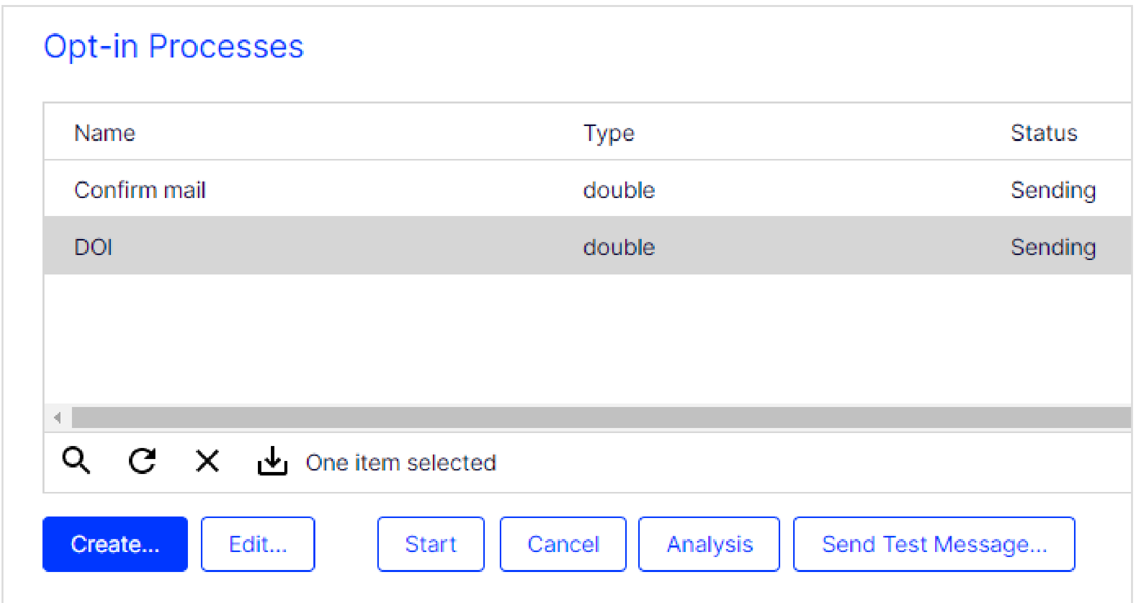
> **Note:** See Advanced configuration how to work with multiple subshops and language versions.

To configure subscribes and unsubscribes, do the following:

1. Configure the opt-in mailing (registration confirmations) in Optimizely Campaign, then use a field function to reference the confirmation link to your shop.
2. Insert the opt-in ID and the authorization code (for recipient consent) in Shopware.
3. Enable the use of the double opt-in method in Shopware.

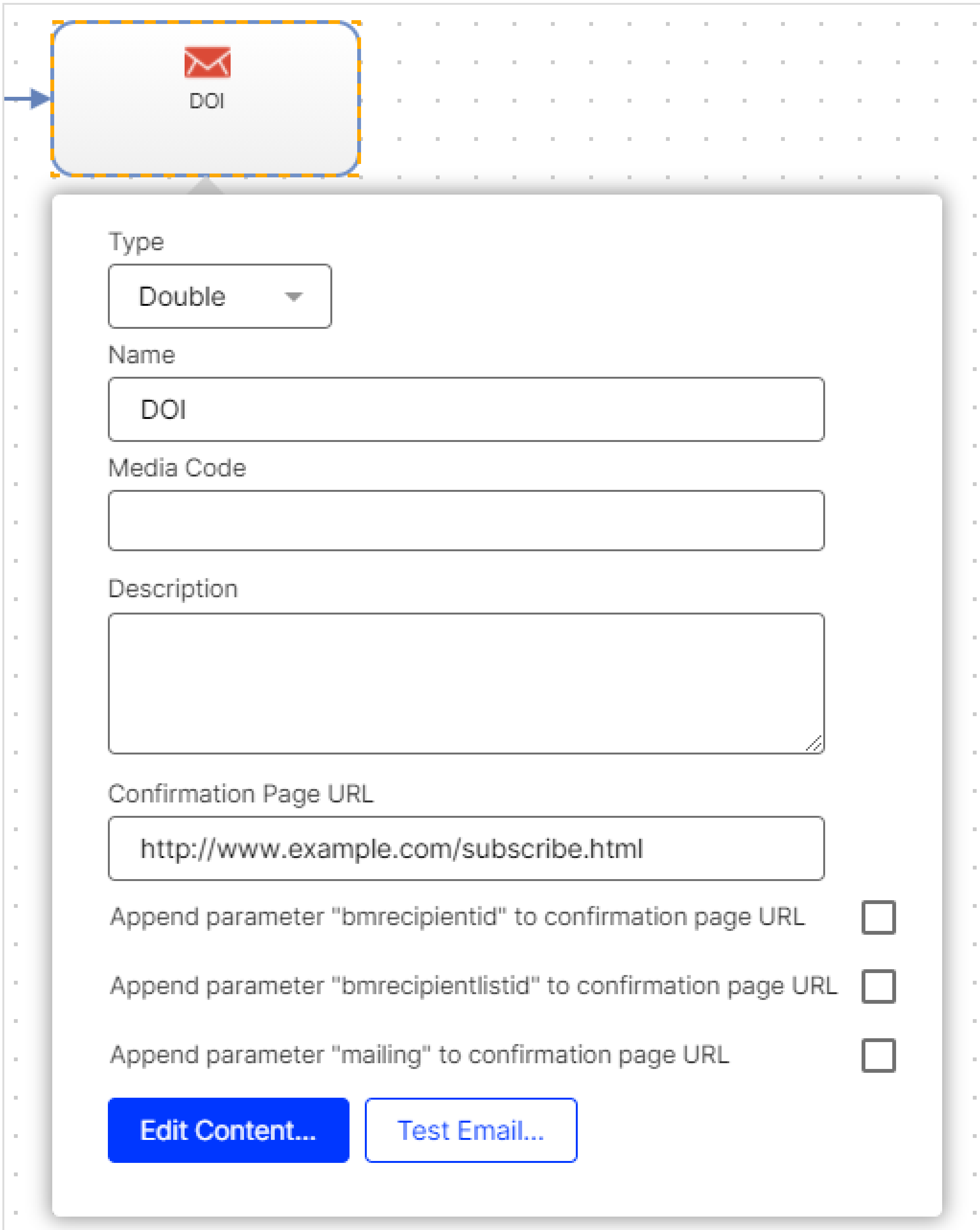
Step 1. Configuring the opt-in mailing

1. Open the Optimizely Campaign menu and select **Campaigns** >**Opt-in processes**.
2. Select the opt-in process for the connection to your shop and click **Edit...**.



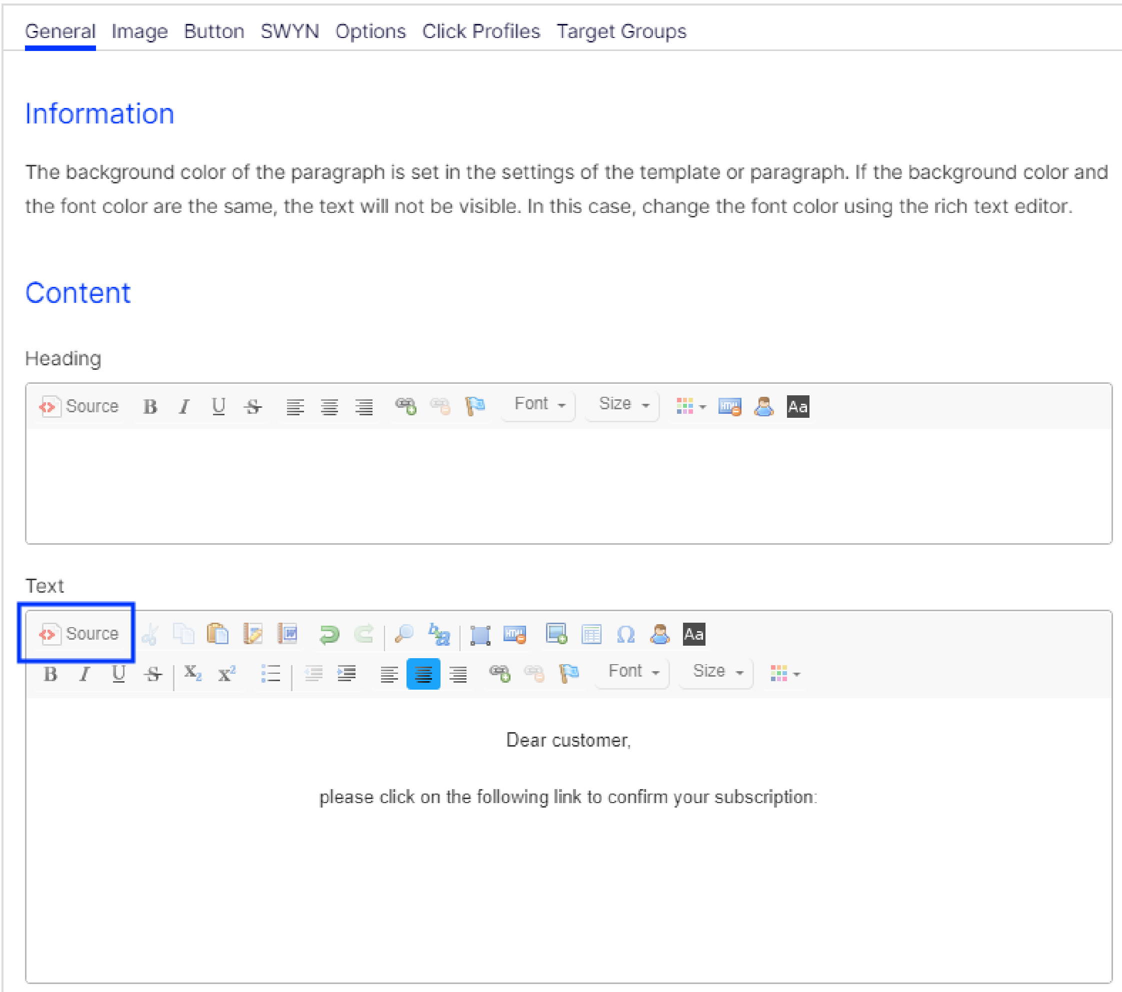
3. On the **Email** node, click **Properties** .

4. Click **Edit Content…**.



5. Click the name of the paragraph that contains the registration confirmation link.

6. In the **Text** area, click **Source**.



7. Replace the existing link with the following code lines or field functions:

```
{Double-Opt-In-Link}?hash={customer-id}&shop-id={shop-id}&shop={shop}
```

You can find the link that you need to replace between the <a> tags in quotation marks.

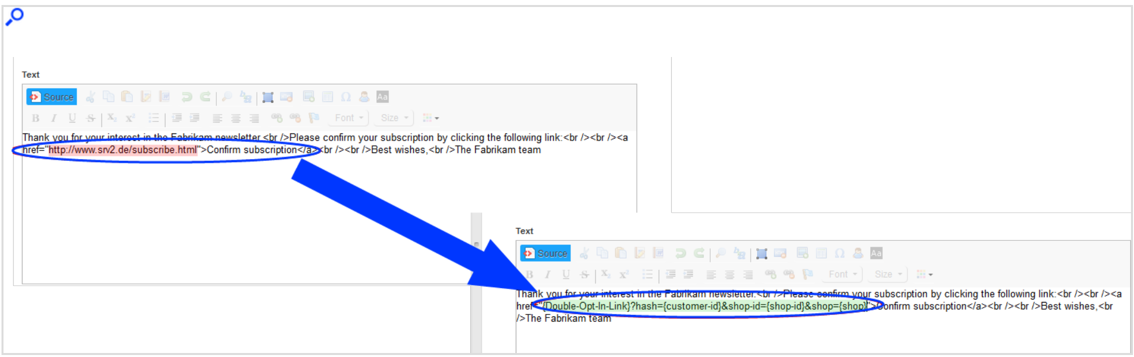
Example

In the source code, the following link is contained in <a> tags:

```
<a href="http://srv2.de/subscribe.html">Confirm subscription</a>
```

Replace the link marked in red in quotation marks as follows:

```
<a href="{Double-Opt-In-Link}?hash={customer-id}&shop-id={shop-id}&shop=
{shop}">Confirm subscription</a>
```



> **Note:** The Shopware integration accepts the referral (the call), and identifies the customer by the **hash** parameter and the store or subshop, using the **shop-id** and **shop** parameters, respectively.

8. Click **Apply** > **Close** > **Save and close**.

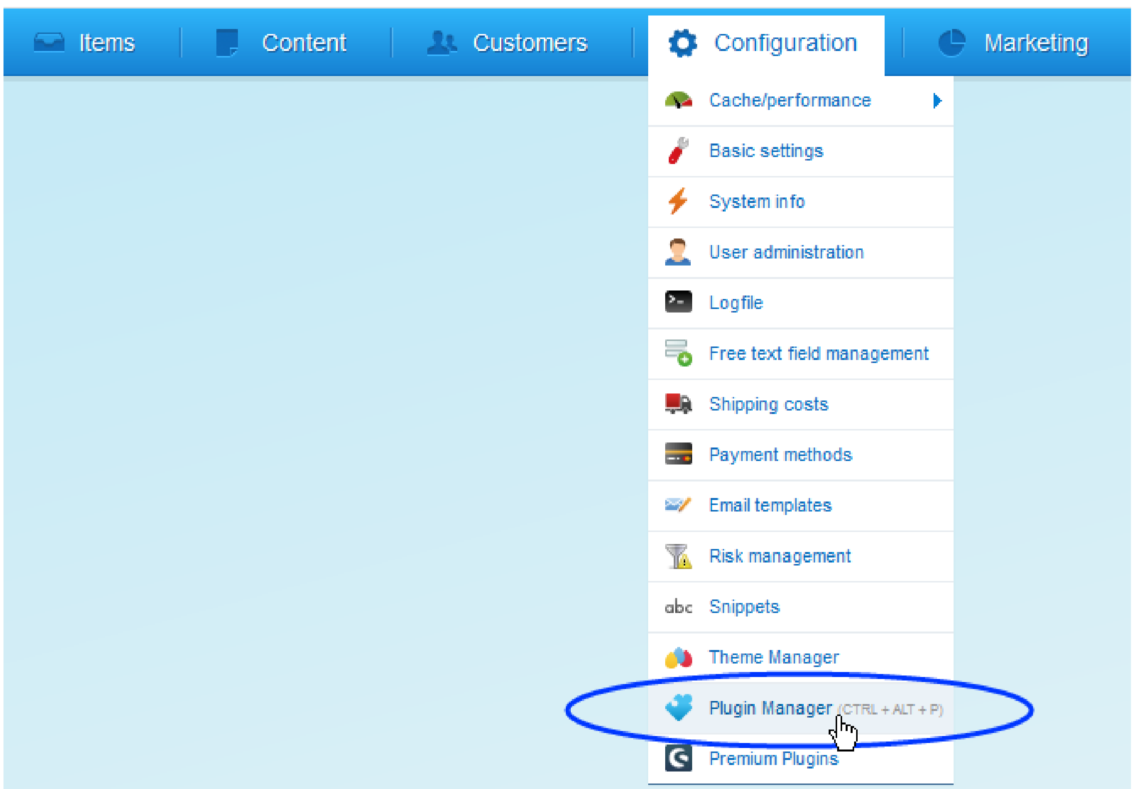
Step 2. Inserting the opt-in ID and the authorization code

For this step, you need to insert two values in your Shopware system:

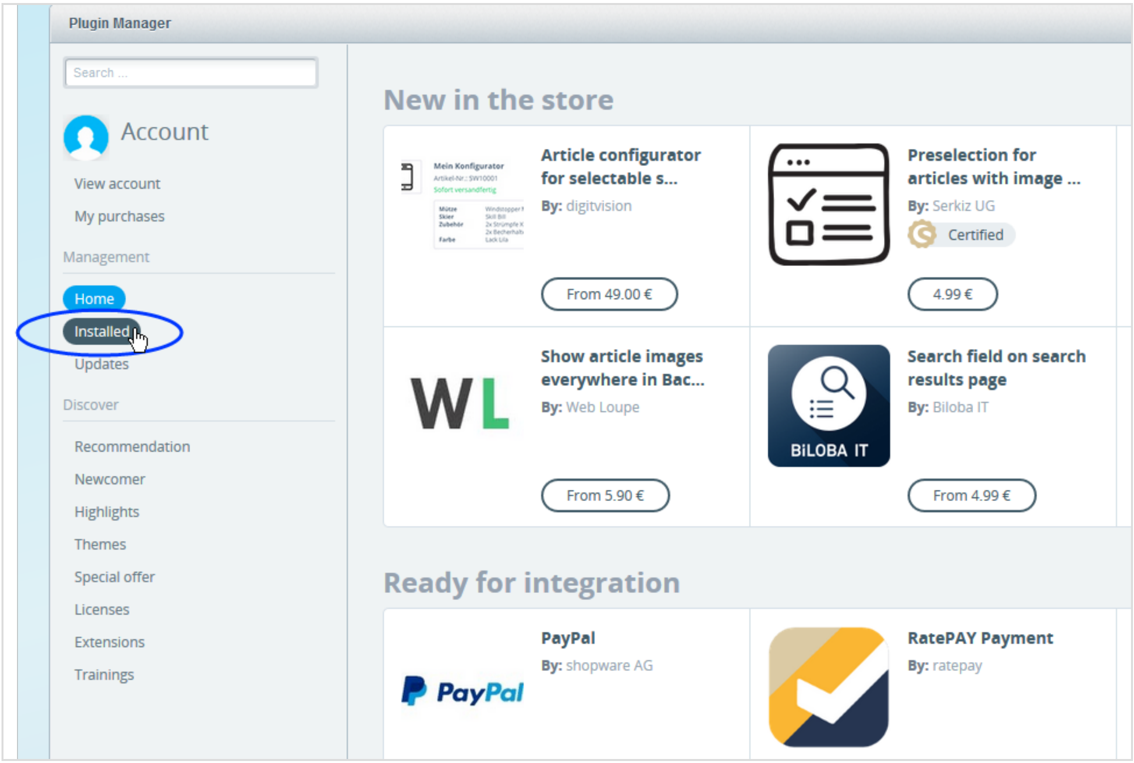
- The opt-in ID used to record recipient consent. To see the opt-in ID, open the Optimizely Campaign menu and select **Administration** > **API overview** > **Opt-in processes**.
- The authorization code for the recipient list that Optimizely customer support has generated to connect your shop. To locate this in Optimizely Campaign, select **Administration** > **API overview** > **Recipient lists** tab. Select the corresponding recipient list and click **Manage authorization codes**. If no authorization code is presently available for this recipient list, click **Create authorization code**.

> **Note:** Do not confuse the **recipient list** for your newsletter recipients with the transaction recipient list for your transactional mails. Customer support sets up two different types of recipient lists for the sending of newsletters and the sending of transactional mails (for example order confirmations, invoices).

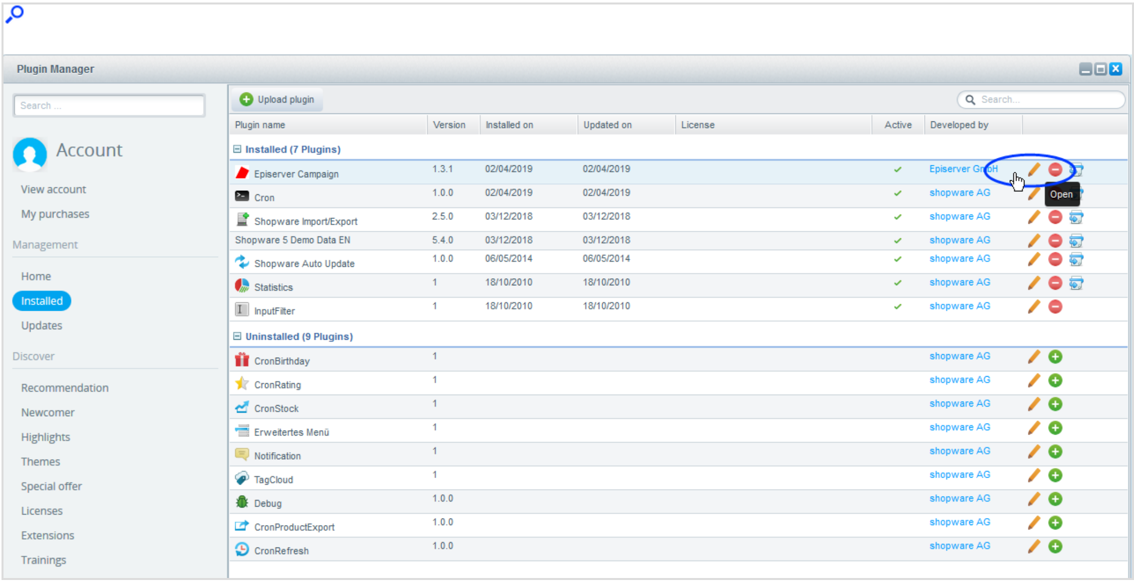
1. Log in to the back-end of Shopware using administrator rights.
2. Go to **Configuration** > **Plugin Manager**.



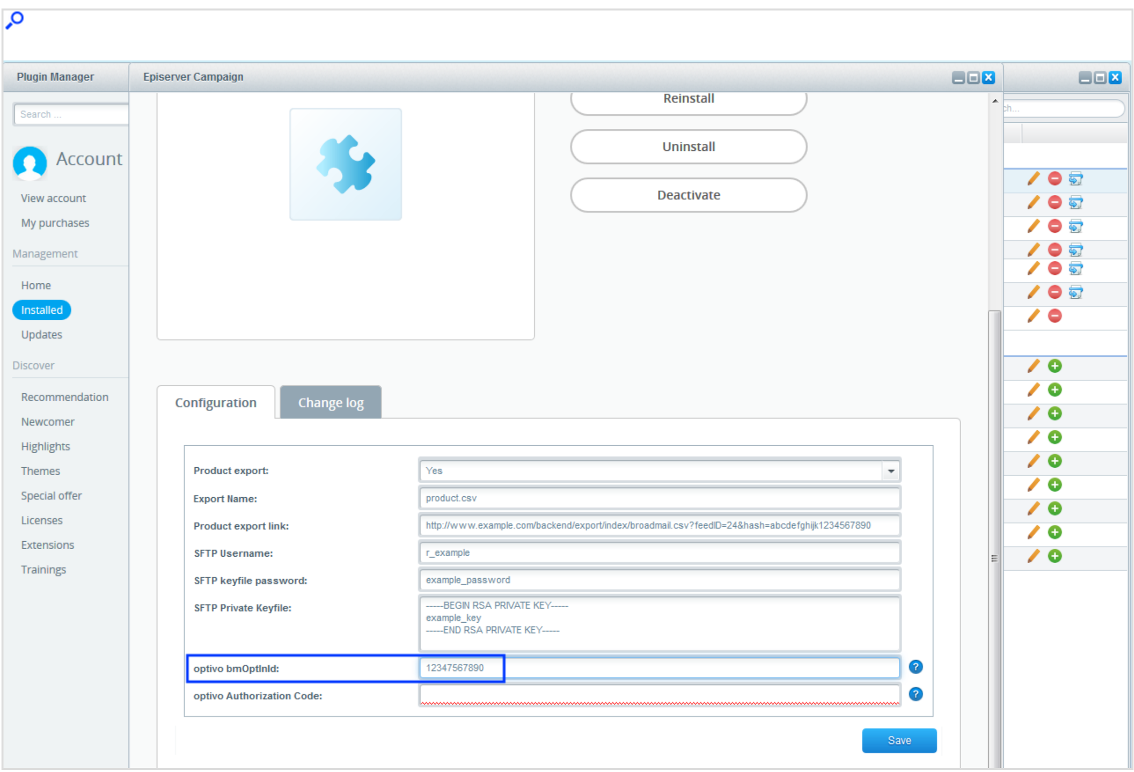
3. On the left side of the menu bar, click **Installed**.



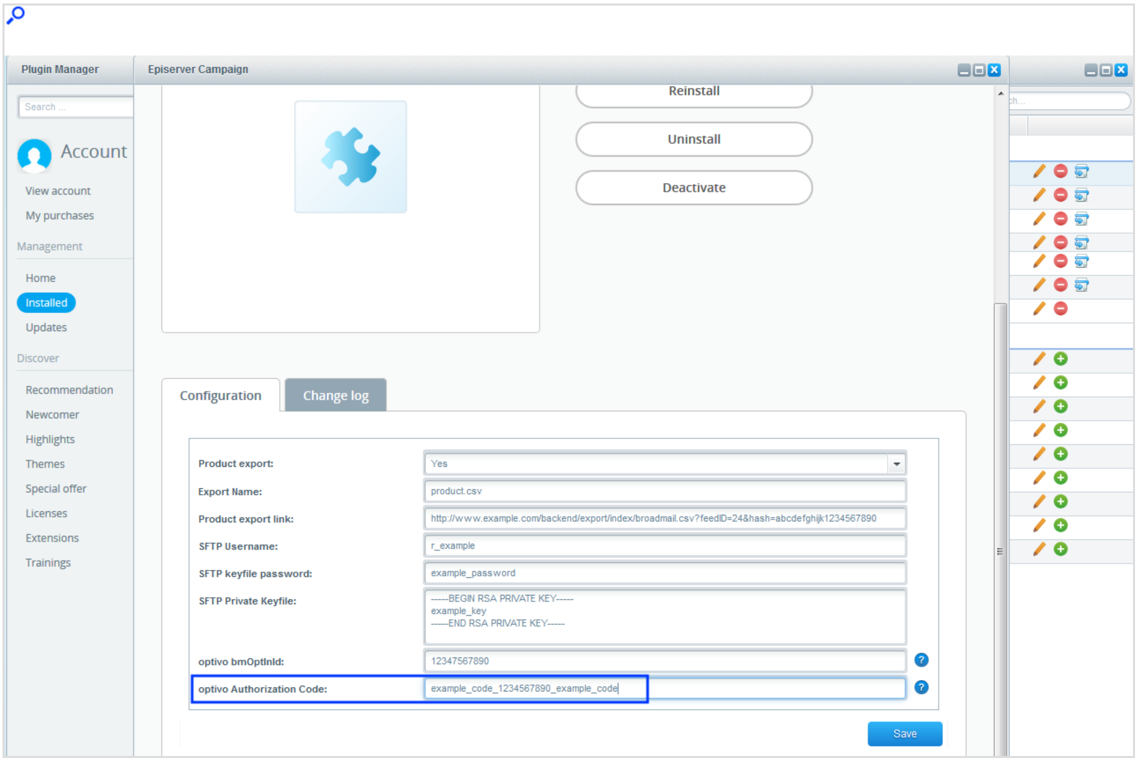
4. In the list, find the Shopware integration for **Episerver Campaign** in the Plugin Manager, and click **Open** .



5. In the **Configuration** area, in the **optivo bmOptInID** box, enter the opt-in ID.



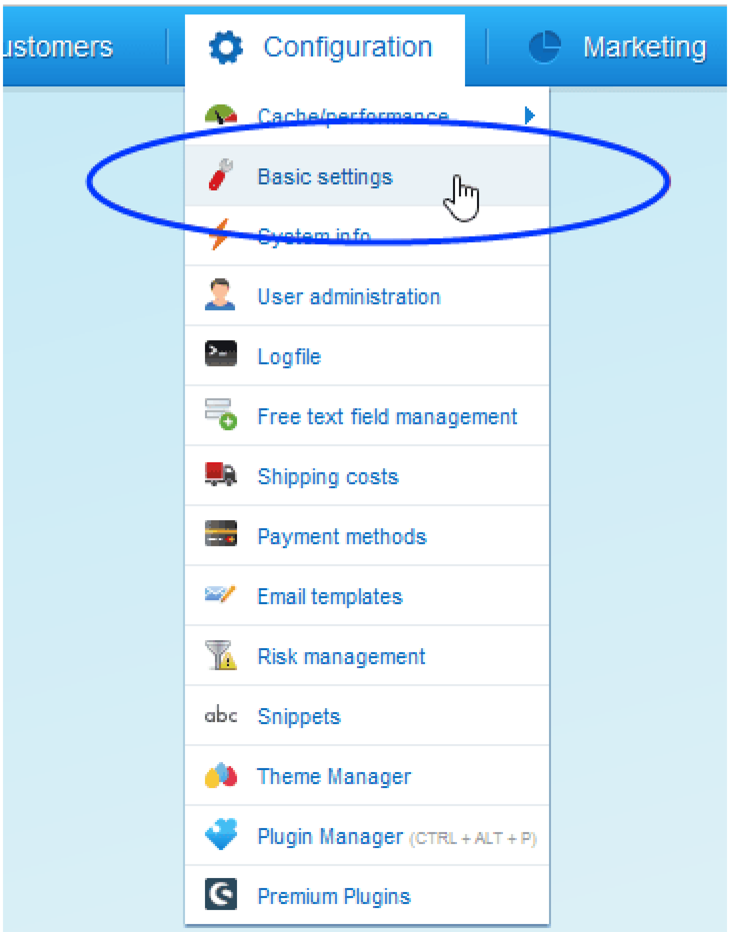
6. In the **Configuration** area, in the **optivo Authorization Code** box, enter the authorization code of your recipient list.



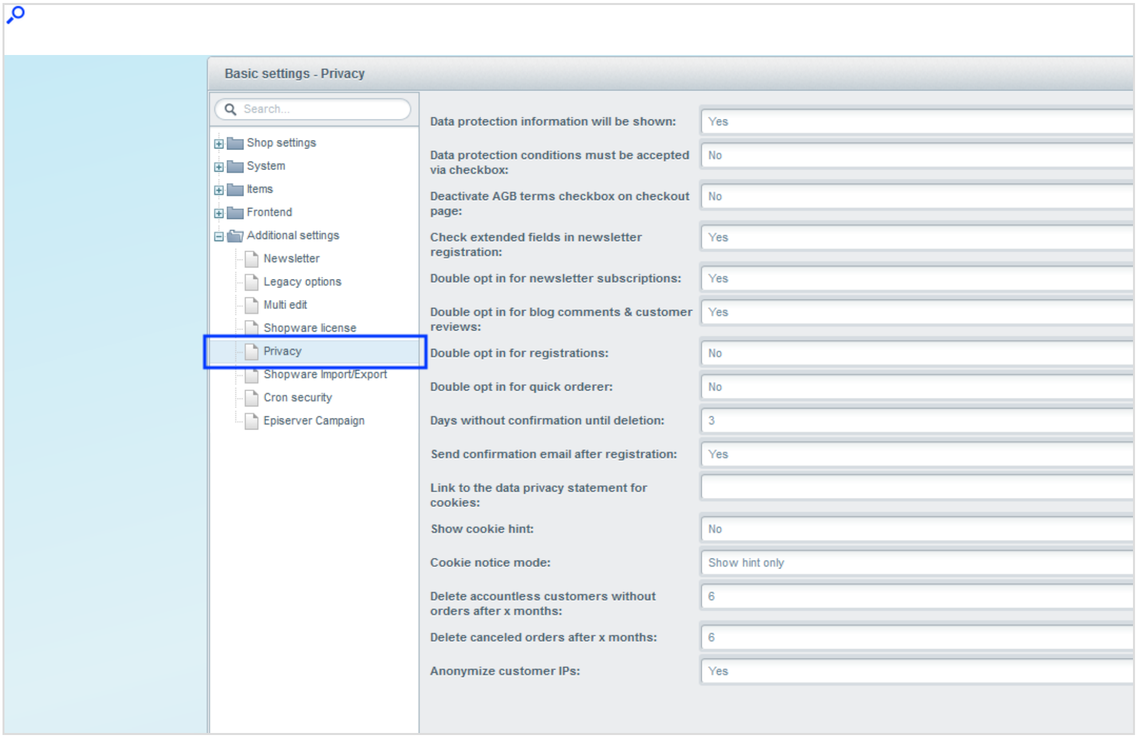
7. Click **Save**.

Step 3. Enabling the double opt-in method

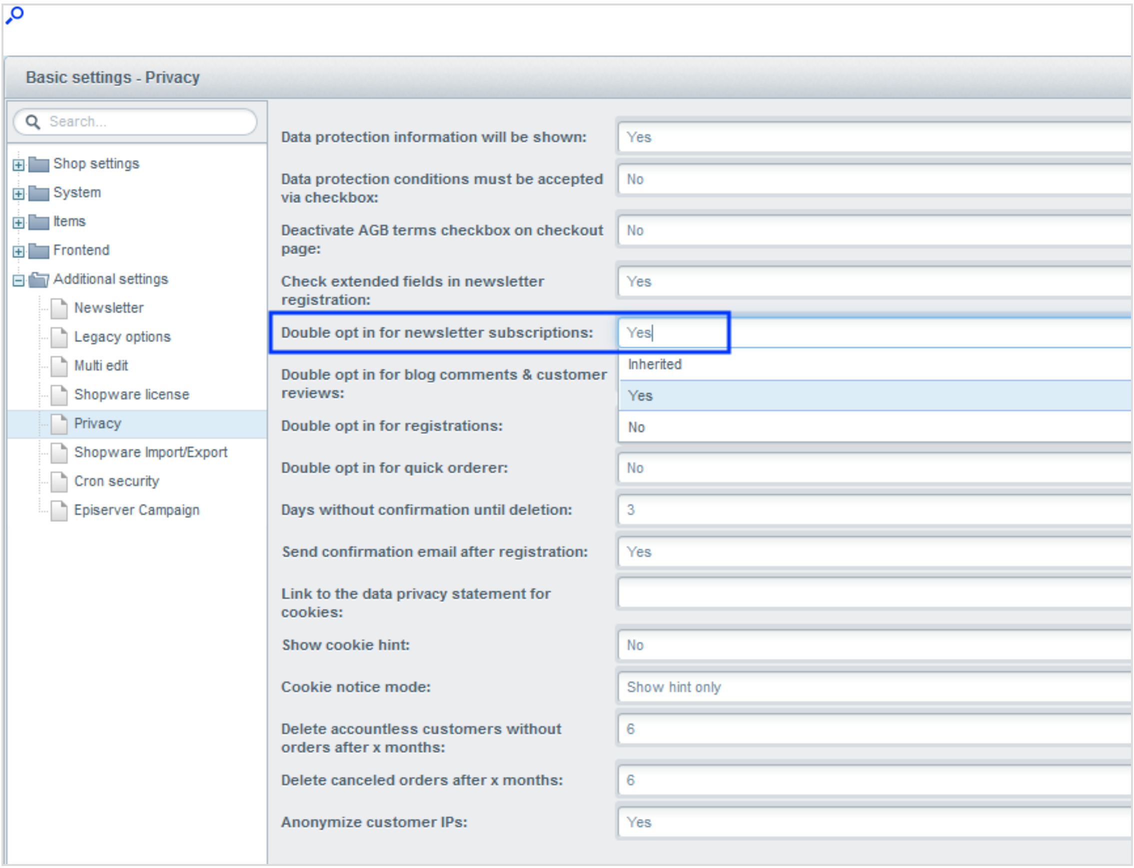
1. In Shopware, go to **Configuration** > **Basic settings**.



2. Go to **Additional settings** > **Privacy**.



3. In the **Double opt in for newsletter subscriptions** drop-down list, select **Yes**.



4. Click **Save**.

Configuring transactional mails

> **Note:** This topic is for administrators and developers with administration access rights in Shopware.

This topic describes how to configure sending of transactional mails when using Shopware as e-commerce platform with Optimizely Campaign.

How it works

Sending of transactional mails uses these templates:

- A **Sender** template in Shopware, which sends the variables of the transaction (for example customer name, ordered products) via the HTTP API.
- A **Recipient** template in Optimizely Campaign, which uses field functions to insert sent variables into relevant locations. This creates the finished transactional mail with layout, and sends it to the recipient.

The sending and receiving of the content of the variables use the transaction recipient list as a buffer.

1. The Shopware template sends the variables.
2. The variables are written into the transaction recipient list: each variable into the relevant recipient list field.
3. Using field functions, Optimizely Campaign copies the template with the individual variables from the transaction recipient list and places it in the desired location in the transactional mail.

Configuration steps

1. Set up the transaction recipient list.
2. Configure the template in Optimizely Campaign.
3. Configure the template in Shopware.
4. Configure the details of transaction mails.
5. Set up the transactional mails for multiple shops.

Step 1. Setting up a transaction recipient list

To set up a transaction recipient list, contact customer support. Plan in advance which variables you want to transfer from Shopware into Optimizely Campaign for your transactional mails.

List the Shopware variables for which you require a corresponding recipient list field in your transaction recipient list. Also, let Optimizely know the naming of the recipient list fields.

Step 2. Creating a template in Optimizely Campaign

Create the template and add the desired transactional mail texts (the unchangeable, static texts to be sent to recipients) and insert field functions in the places where the content of the Shopware variables should be.

About field functions

Field functions are placeholders that refer to a specific recipient list field in your transaction recipient list. The variables and content of the variables sent from Shopware are written into the relevant recipient list fields in your transaction recipient list. The field functions you place load relevant content from the referenced recipient list field in the next step.

Example

Set up a transactional mail text that greets each customer using the last name and the order date. For this you need these variables: **salutation**, **lastname** and **orderdate**.

The content of the variables is first written to a relevant recipient list field of the transaction recipient list (from Shopware via the HTTP API). To access these recipient list fields, insert the individual field functions into the Optimizely Campaign template and place the name of the recipient list field in curly brackets. To import the variable contents, the static text and field functions in the Optimizely Campaign template could look like this:

```
Hello, {salutation} {lastname}! Thank you for your online order from {orderdate}.
```

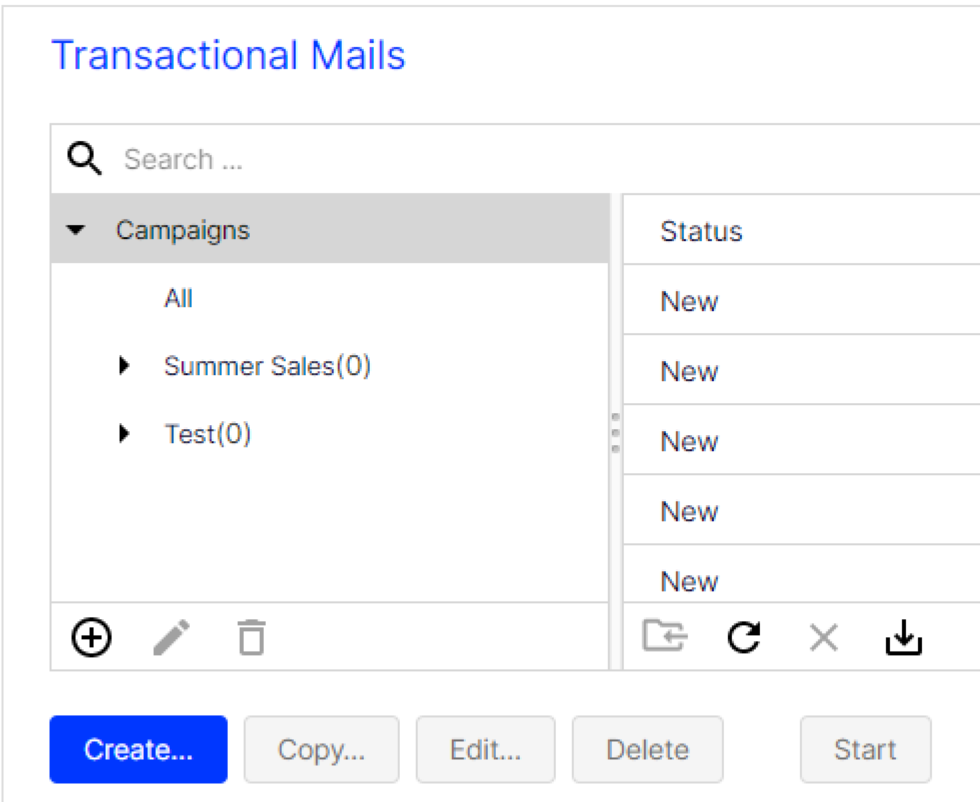
The example will appear in the sent transactional mail as follows:

© Optimizely 2022

Hello, Mr. Miller!
Thank you for your online order from August 3.

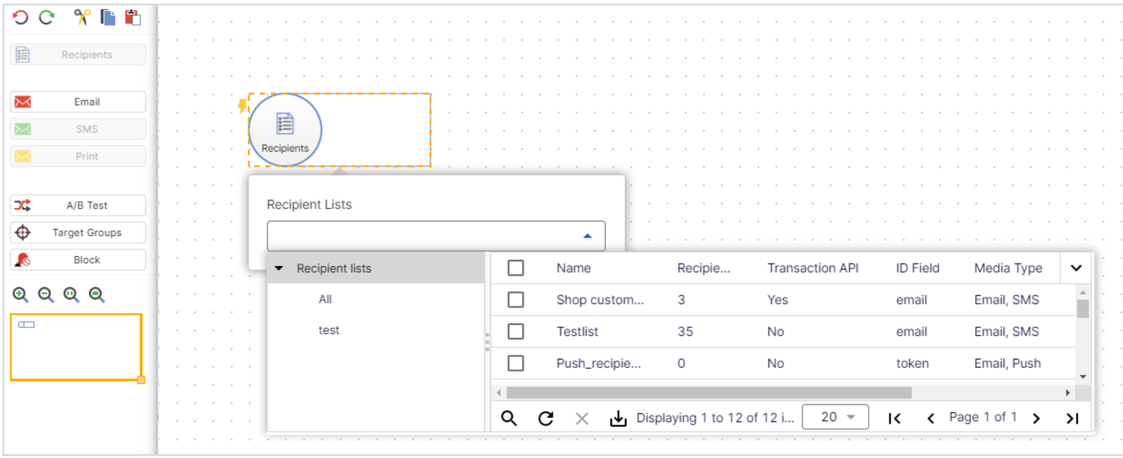
To create the template, do the following:

1. Open the Optimizely Campaign menu and select **Campaigns** > **Transactional Mails**.
2. Click **Create...**.



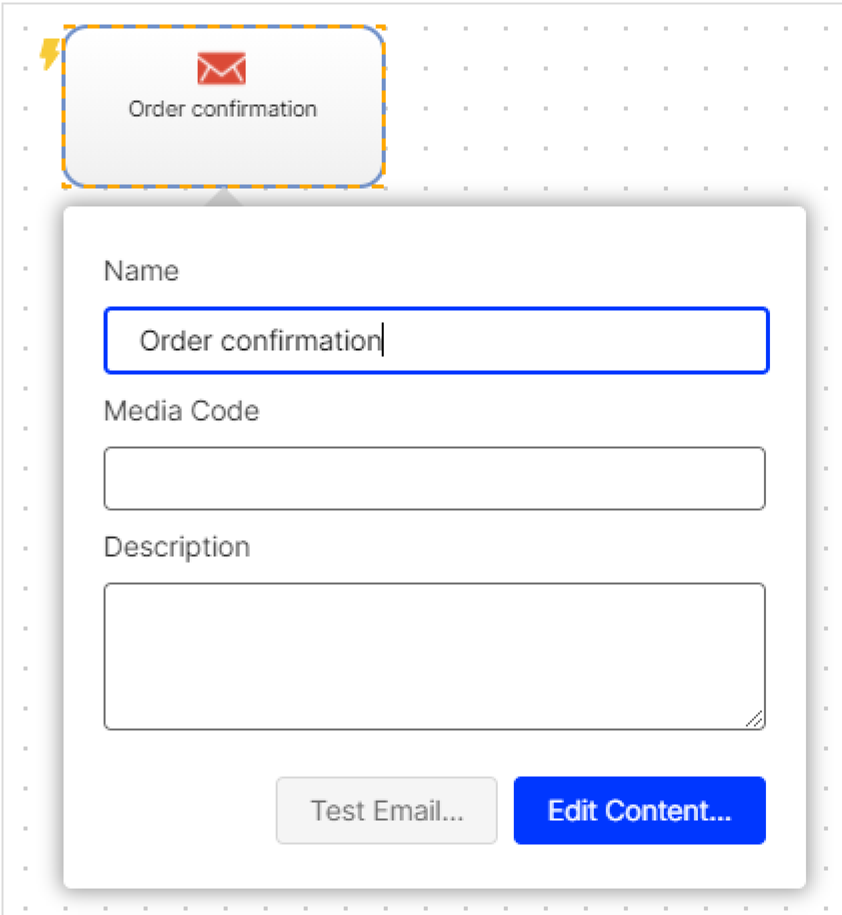
3. Drag the **Recipients** node from the left action area to the working area on the right.

4. In the **Recipient lists** drop-down list, select your transaction recipient list.



> **Note:** Customer support sets up a separate transaction recipient list for you. Be sure you use this transaction recipient list, instead of a regular recipient list. To see if a recipient list is a transactional recipient list, check the column **Transaction API**.

5. From the left action pane, drag the message node for the desired marketing channel (email, SMS) into the workspace.
6. In the **Name** box, assign a concise name to your transactional mail (such as *Order confirmation*).



7. In the context menu for the message node, click **Edit Content...**.
8. In the **Template** drop-down list, select the desired template and confirm your selection by clicking **Next**.
9. Configure the template for the transactional mail according to your requirements. Enter a subject and insert the static texts that you want recipients to receive, into the content paragraphs. Insert the relevant field function for the recipient list field of the transaction recipient list into places where variables from the Shopware template should appear (see the previous example in this topic).
10. Click **Close**.
11. Connect the **Recipient** node with the message node.
12. Click **Save and Close**.
13. To activate your transactional mail and to start the sending process, select the mailing in the overview and click **Start**.

Step 3. Configuring the template in Shopware

Configure a transactional mail template that sends variables to Optimizely Campaign via the HTTP API.

Prerequisites

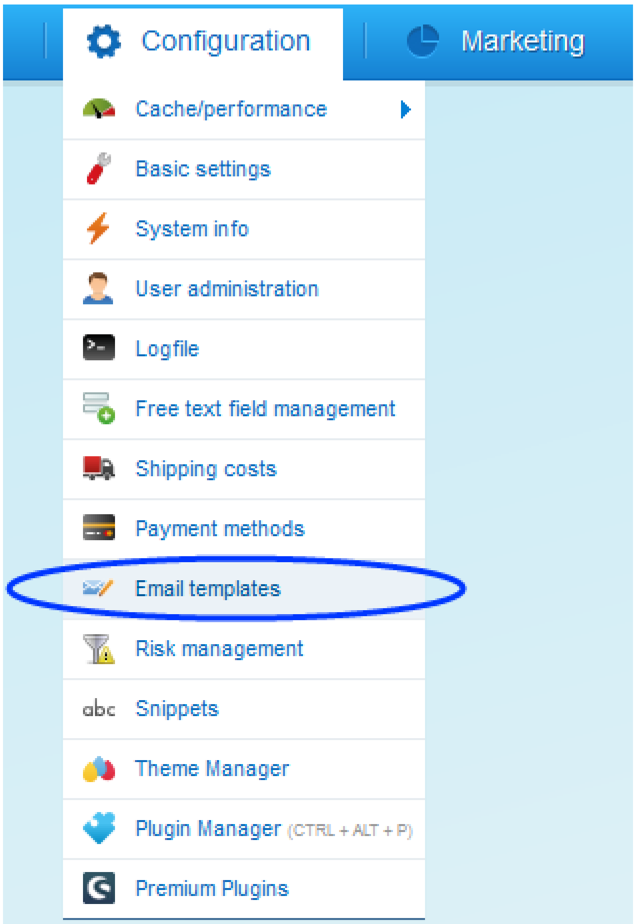
- **Authorization code** for your transaction recipient list in to Optimizely Campaign. To see the authorization code, open the Optimizely Campaign menu and select **Administration** > **API Overview**. Open the **Recipient lists** tab and select the desired transaction recipient list. Click **Manage authorization codes** and copy the authorization code from the list. If no authorization code is available for the selected recipient list, click **Create authorization code.**
- The **mailing ID** for the template in Optimizely Campaign. To see the mailing ID, open the the Optimizely Campaign menu and select **Campaigns** > **Transactional mails**. Copy the relevant mailing ID of the template in the list in column **ID**.

The Shopware integration contains two functional templates for demonstration purposes:

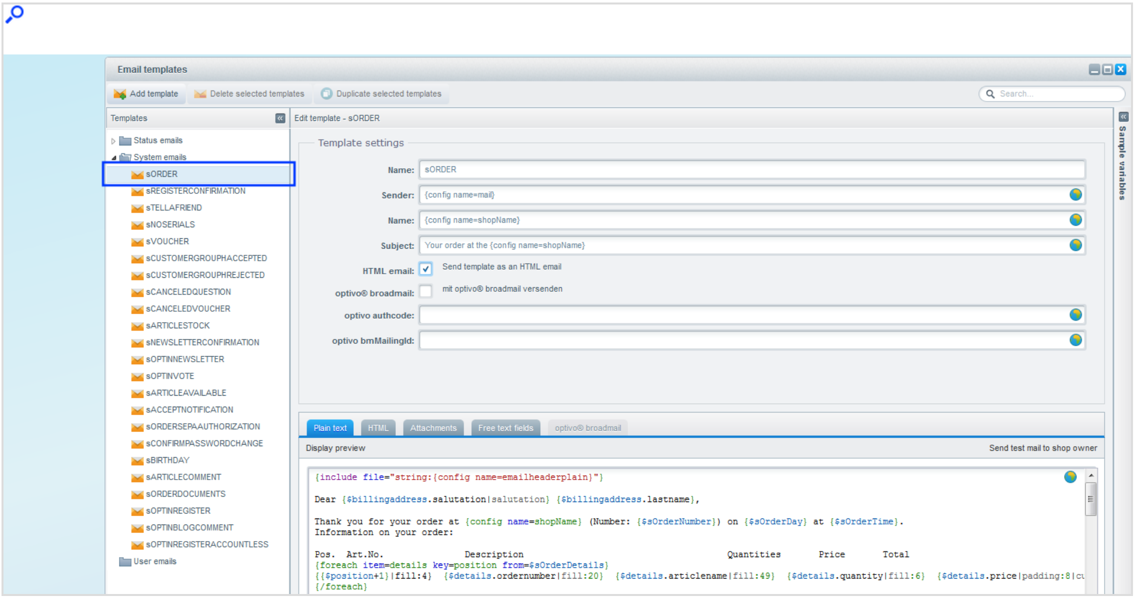
- sREGISTERCONFIRMATION
- sORDER

> **Note:** Do *not* use the system template **sOPTINNEWSLETTER**, which is included in the Shopware standard, to set up the newsletter registration. If you do, newsletter registration with Optimizely Campaign will not work.

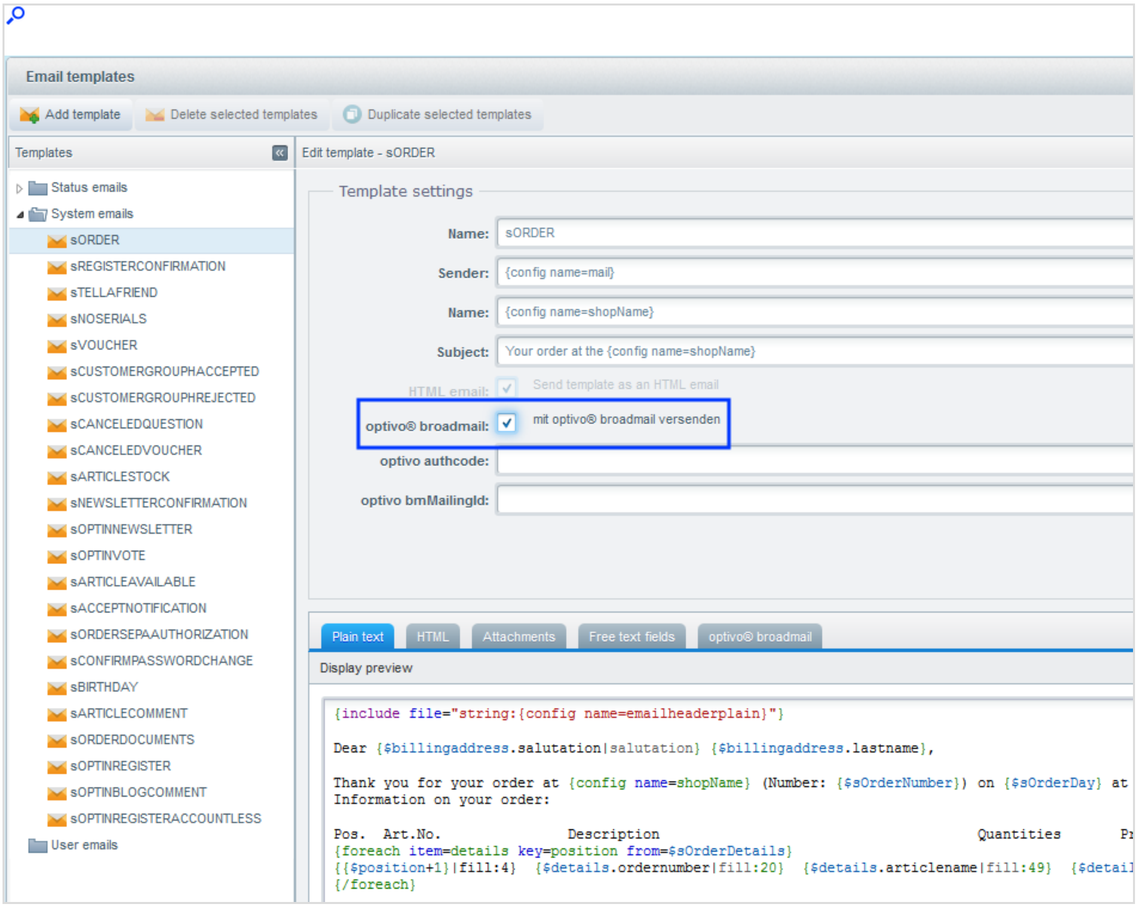
1. Log in to the back-end of your Shopware system with administrator rights.
2. Go to **Configuration** > **Email templates**.



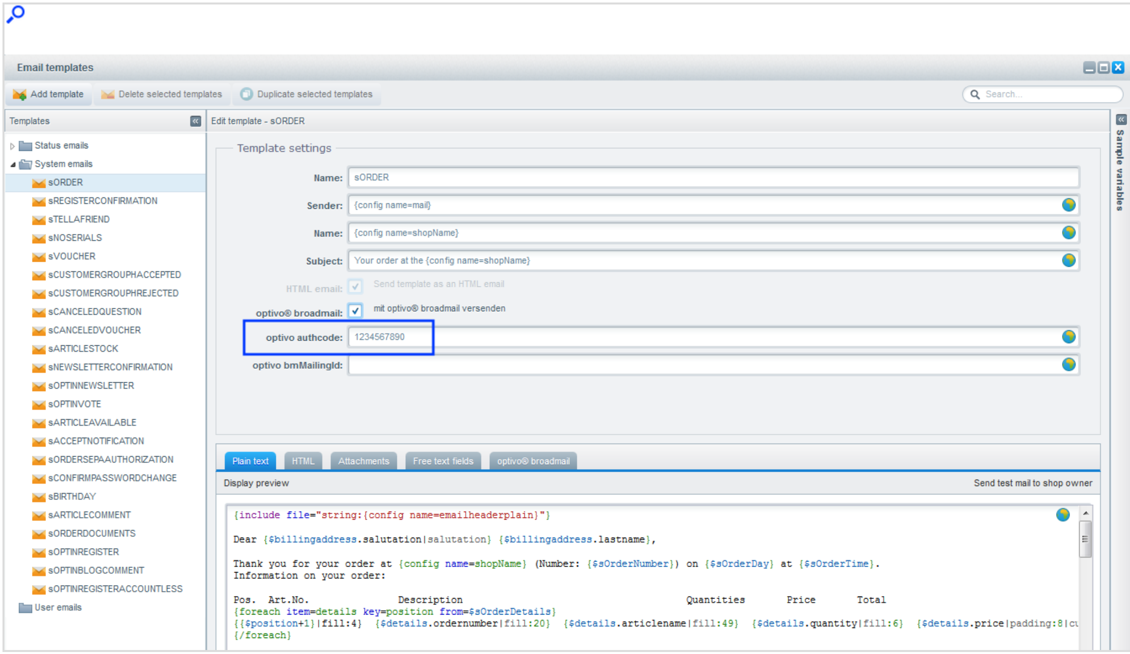
3. Go through the directory structure to the template that you want to configure.



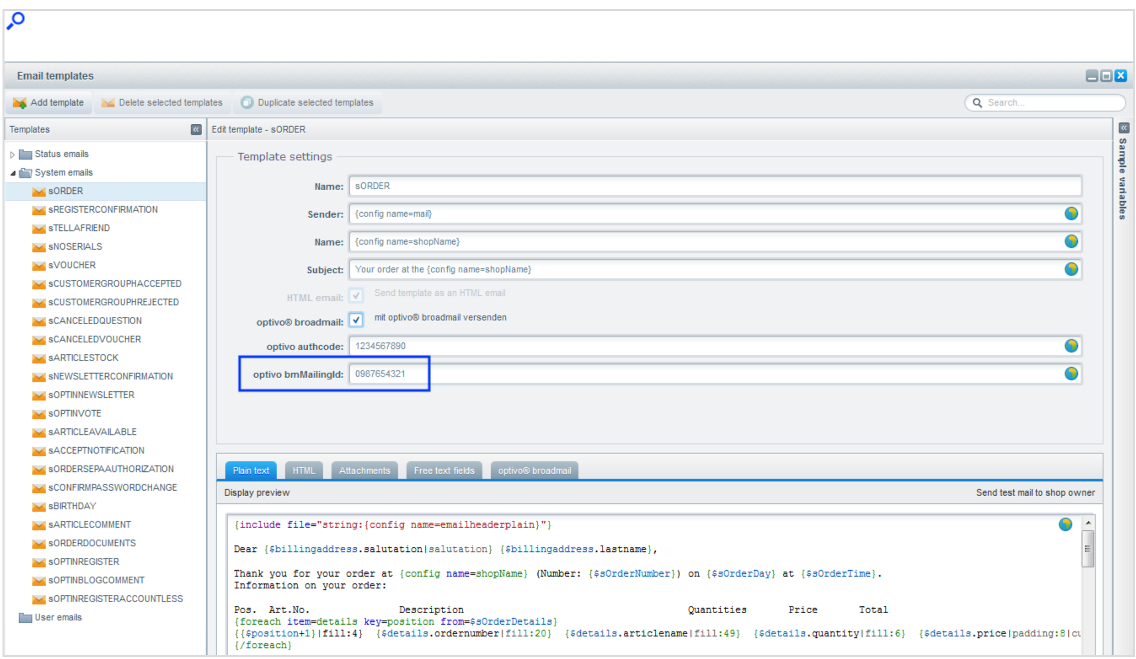
4. To send the template variables to Optimizely Campaign via the HTTP API, select **optivo broadmail** ("Send with optivo broadmail").



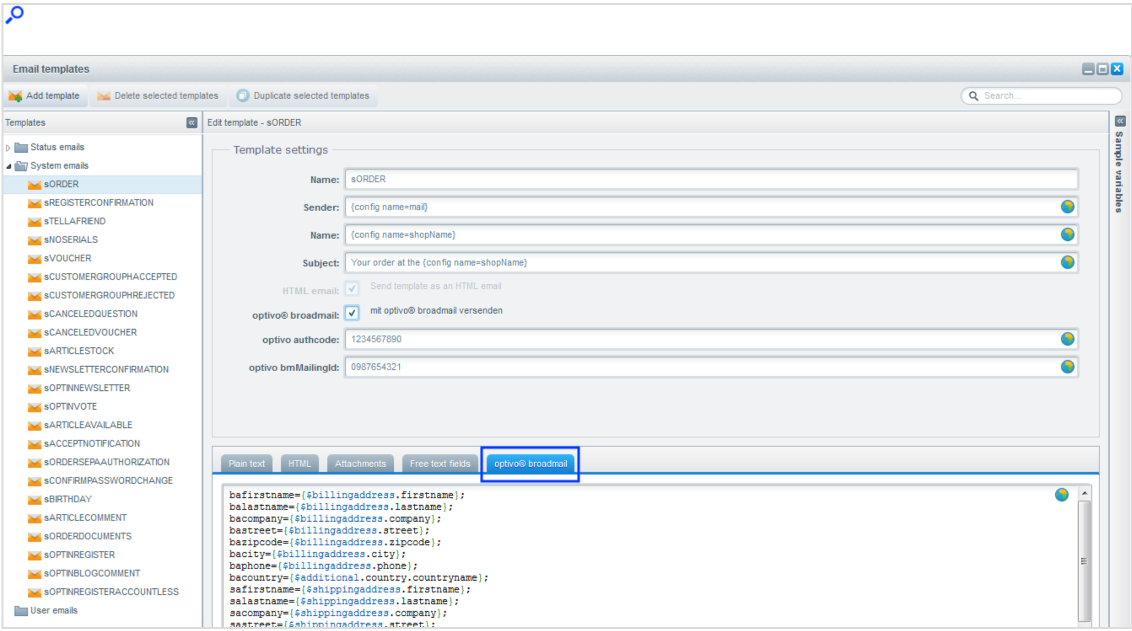
5. In the **optivo authcode** box, enter the authorization code of your transaction recipient list in Optimizely Campaign.



6. In the **optivo bmMailingId** box, enter the mailing ID of the template in Optimizely Campaign.

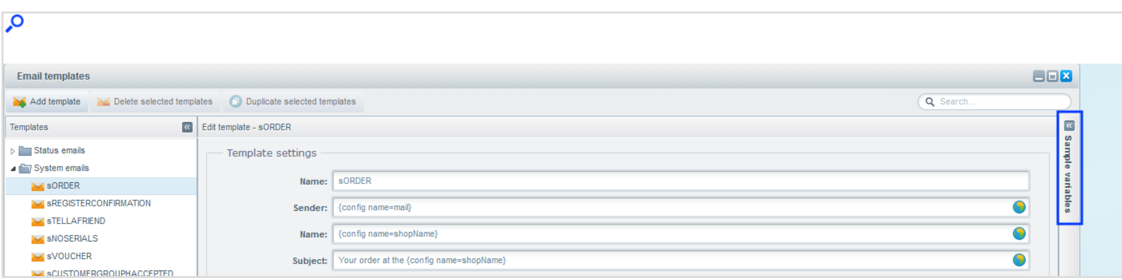


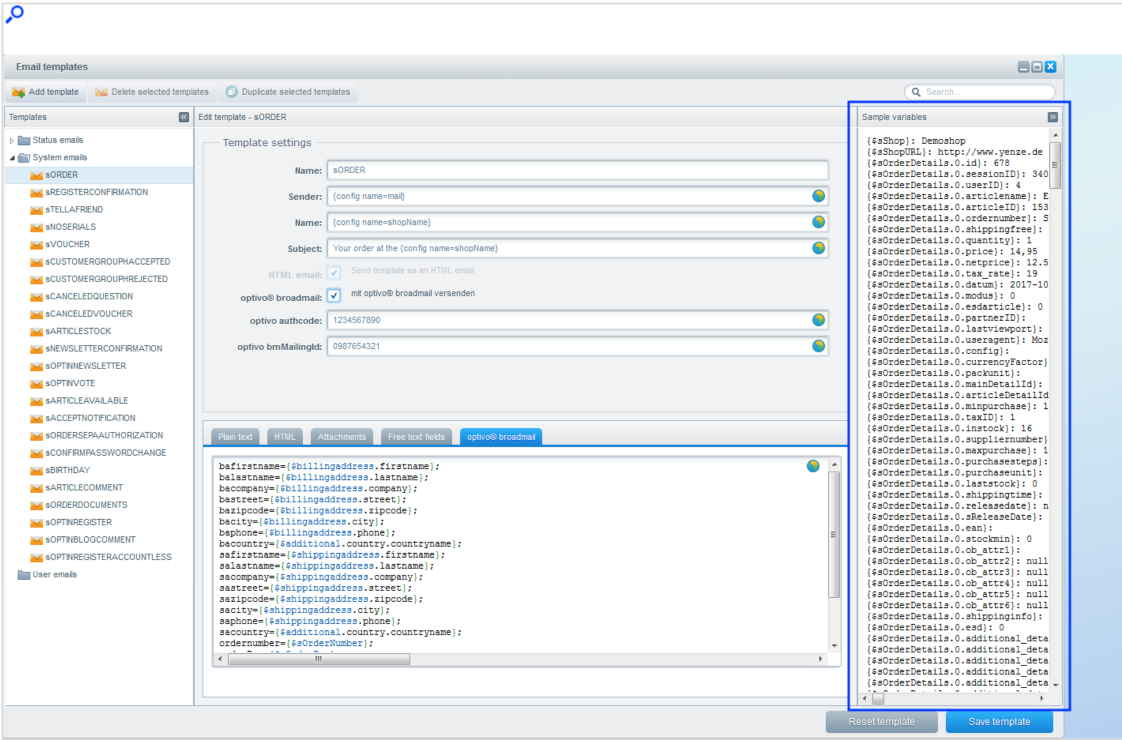
7. Open the **optivo broadmail** tab.



> **Note:** If the mailing is activated via Optimizely Campaign, the field values in the tabs **Plaintext**, **HTML-Text**, and **Attachments** are ignored.

8. In the fields of the **optivo broadmail** tab, map the Shopware variables with the corresponding recipient list fields in your transaction recipient list to Optimizely Campaign. To see available variables for the respective template, click **Sample variables**.





Mapping ("Assigning")

The Shopware integration from Optimizely Campaign uses the following structure for mapping:

```
Name of the recipient list field=name of the Shopware variable
```

Enter the mapping assignment for each variable line-by-line, and end each line with a semicolon. Separate the individual variables/mapping assignments with line breaks.

Example:

```
salutation={salutation};
firstname={firstname};
       lastname={lastname};
       smail={sMAIL};
       shopname={config name=shopName};
```

Use the example lines to map and transfer:

- Shopware variable value {salutation} to transaction recipient list field `salutation`
- Shopware variable value {firstname} to transaction recipient list field `firstname`
- Shopware variable value {lastname} to transaction recipient list field `lastname`
- Shopware variable value {sMAIL} to transaction recipient list field `smail`
- Shopware variable value {config name=shopName} to transaction recipient list field `shopname`

> **Note:** Make sure that you map the Shopware variables to be transmitted to existing recipient list fields. Contact customer support to set these up. Determine in advance which data/content to transfer to Optimizely Campaign, and which content you can implement as static text in the Optimizely Campaign template.

9. Click **Save template**.

Step 4. Configuring transactional mails

The language template in Shopware writes the ordered products **as a character string** to the recipient list field **orderPositions** in the transaction recipient list. In the template **sORDER**, which contains the Shopware integration by default, you will find the following line next to the standard customer data:

```
orderPositions={foreach item=details key=position from=$sOrderDetails}
  "{$details.ordernumber}"{literal};{/literal}
  "{$details.quantity}"{literal};{/literal}
  "{$details.price} EUR"{literal};{/literal}
  "{$details.amount} EUR"{literal};{/literal}
  "{$details.articlename}"{literal};{/literal}{/foreach};
```

The **foreach loop** summarizes ordered products in a character string in CSV format. The individual columns (order number, quantity, price, total price, and article name) are separated by semicolons. The individual products are separated by line break characters.

Adjusting the foreach loop

1. Go to **Configuration** > **Email templates**.
2. Go to the supplied template **sORDER** in the **System emails** directory of the Shopware integration.

3. Open the **optivo broadmail** tab.
4. Make changes in the mapping instruction line for the recipient list field **orderPositions**. For example, replace **EUR** with another currency, such as **USD**.

> **Note:** If you have good knowledge of Shopware template features, you can also use these functions to configure data to be transmitted. Observe the correct masking of special characters when making adjustments. In addition, the masking of the separator (semicolon) with **{literal}** must be retained within the loop.

5. Click **Save template**.

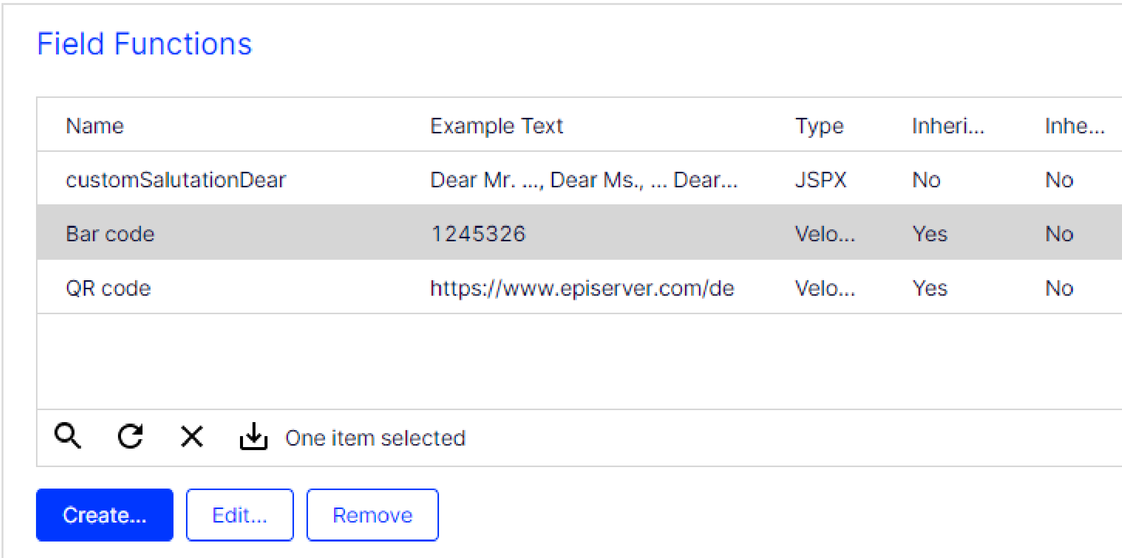
Creating a field function for ordered products

To use the ordered products that are transmitted as a character string in a transactional mail, you need a specific field function in your client. This must use the template engine from Optimizely Campaign to transfer the character string to HTML, and to display ordered products in a table inside the transactional mail.

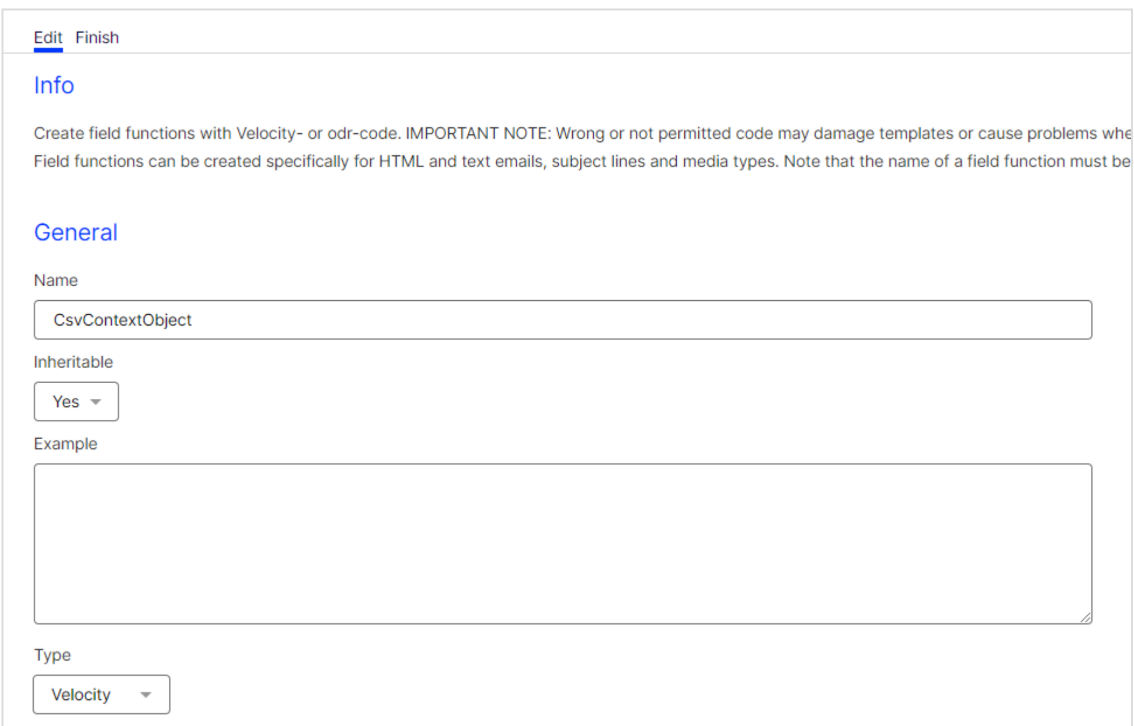
1. Open the Optimizely Campaign menu and select **Administration** > **Field Functions**.

> **Tip:** If **Field functions** is not available in your client, contact customer support to enable this feature.

2. Click **Create...**.

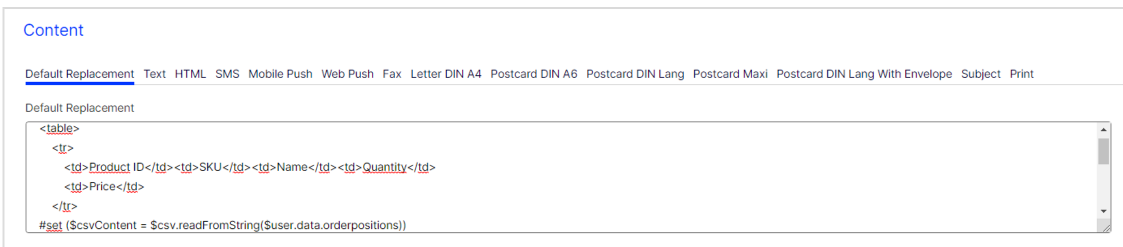


3. Under **General**, in the **Name** field, enter a name for the new field function, such as *CSVOrderObjects*.



4. In the **Type** drop-down list, select **Velocity**.
5. In the **Default replacement** tab in the **Content** area, enter the following code in the **Default replacement** field.

```
<table>
    <tr>
        <td>Product ID</td><td>SKU</td><td>Name</td><td>Quantity</td>
        <td>Price</td>
    </tr>
#set ($csvContent = $csv.readFromString($user.data.orderpositions))
#foreach($row in $csvContent)
    <tr>
#foreach($item in $row)
        <td> $item </td>
#end
    </tr>
#end
</table>
```



6. Click **Save**.

> **Note:** If you have HTML knowledge, you can customize the layout of the table. See Field functions.

Step 5. Setting up transactional mails for multiple shops

If you have additional sub-shops in different languages in Shopware, you can set up individual templates in multiple languages to send transaction mails. You may need separate transaction recipient lists, contact Optimizely customer support in advance.

You may for example want to set the registration confirmation language for your newsletter to *English* for non-German-speaking recipients. Insert the English translation into the template, and use the corresponding field functions created for the English-speaking customers, in the places where the content of the variables provided by Shopware is to be used. If you do not have any field functions for international parameters in your client, contact customer support.

1. Configure an individual template for transactional mails in Optimizely Campaign as described in Create a template in Optimizely Campaign.
2. Log in to the back end of Shopware using administrator rights.
3. Go to **Configuration** > **Email templates**.
4. To find the desired template, go through the list on the left.
5. In the text box, click the globe icon.
6. Select the sub-shop or the language version for the shop from the menu bar on the left.
7. In the **optivo authcode** box, enter the authorization code for the corresponding transaction recipient list in Optimizely Campaign.
8. In the **optivo bmMailingId** box, enter the mailing ID of the individual template you want to use in Optimizely Campaign.
9. Click **Save translations**.

Configuring the catalog export

> **Note:** This topic is for administrators and developers with administration access rights in Shopware.

This topic describes how to configure the catalog export, when using Shopware as e-commerce platform with Optimizely Campaign. You can transfer promotional texts and product images, and use this data in your newsletters. See Content interface paragraph.

How it works

The integration reads a feed created in Shopware and transmits feed data to Optimizely Campaign. You can use filters in Shopware to exclude product categories. The integration exports the catalog to a CSV file (comma-separated values), and automatically transfers the catalog to the Optimizely server via a secure SFTP connection at specific time intervals.

Prerequisites

You need an **SSH key pair** and an **SFTP user account** to set up a secure connection. To create a key pair, see:

- FTP access via SCP for Windows
- FTP access via SCP for MacOS/OS X

When you have created the key pair, do the following to request a user account:

1. Contact customer support, providing the name of the CSV file with your product catalog.
2. Email your public key (the file with the **.pub** extension) to customer support.
3. Send your key fingerprint in a *separate* email to customer support.

> **Note:** For security reasons, always send your public key and key fingerprint in two separate emails.

When your account is configured, you will receive your user account information by email, and you can start the configuration.

Configuration steps

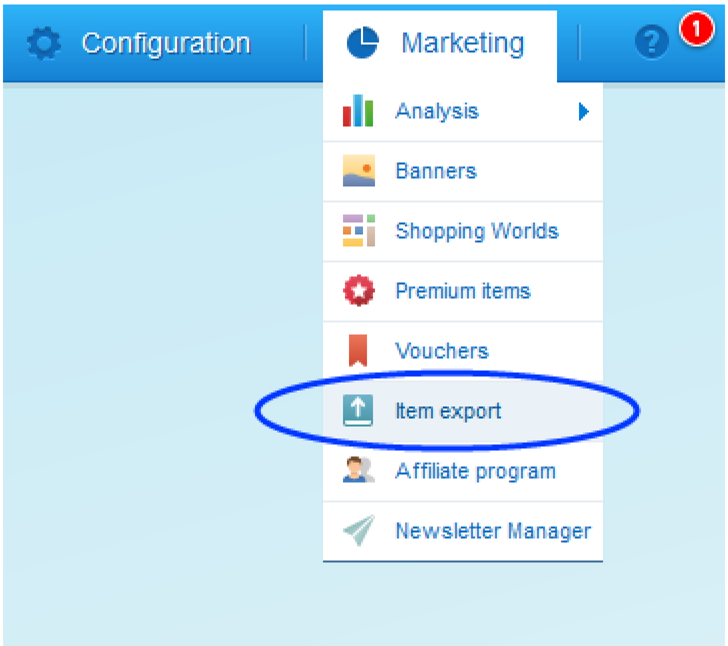
1. Configure the feed for the catalog that is to be exported.
2. Configure your Shopware integration for catalog export.
3. Configure and activate the cron job **Episerver Campaign Product Export** in Shopware to automate daily catalog exports.

Step 1. Configuring your feed for catalog export

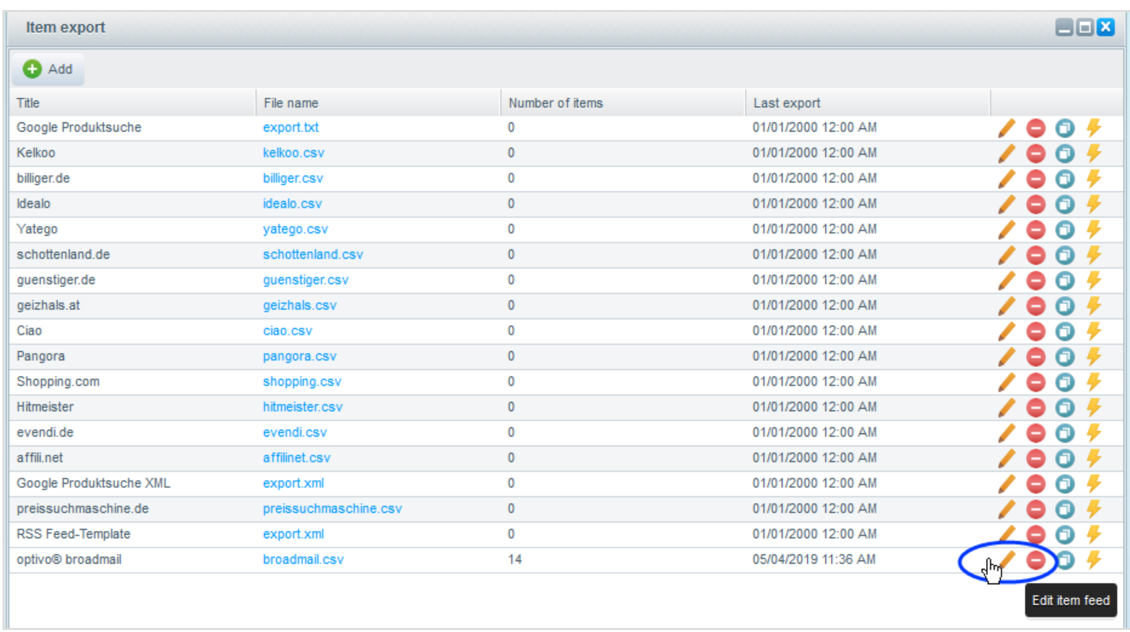
The Shopware integration includes a standard feed that you can copy and customize (recommended).

Do the following to configure a feed:

1. Log in to the back end of Shopware with administrator rights.
2. Go to **Marketing** > **Item export**.

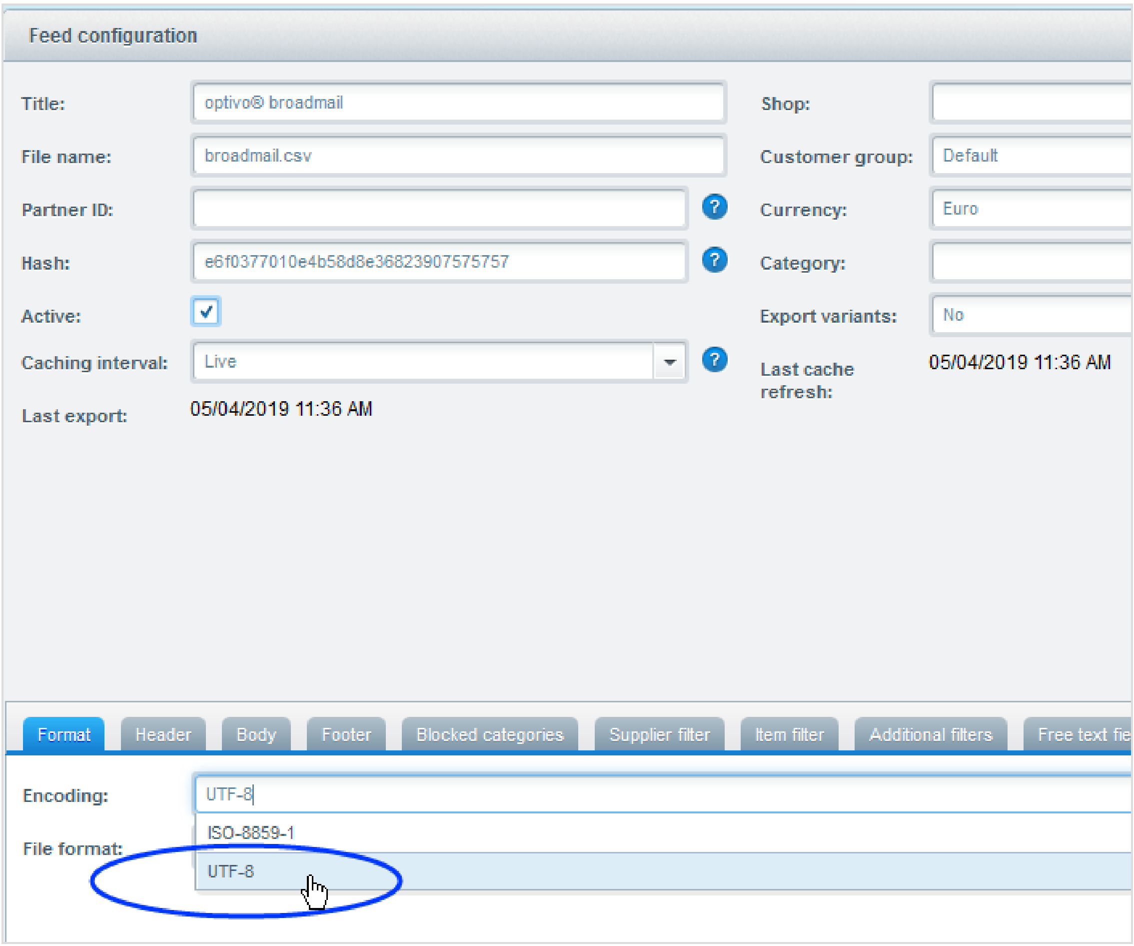


3. In the list, find the entry **optivo broadmail** and click **Edit item feed** .



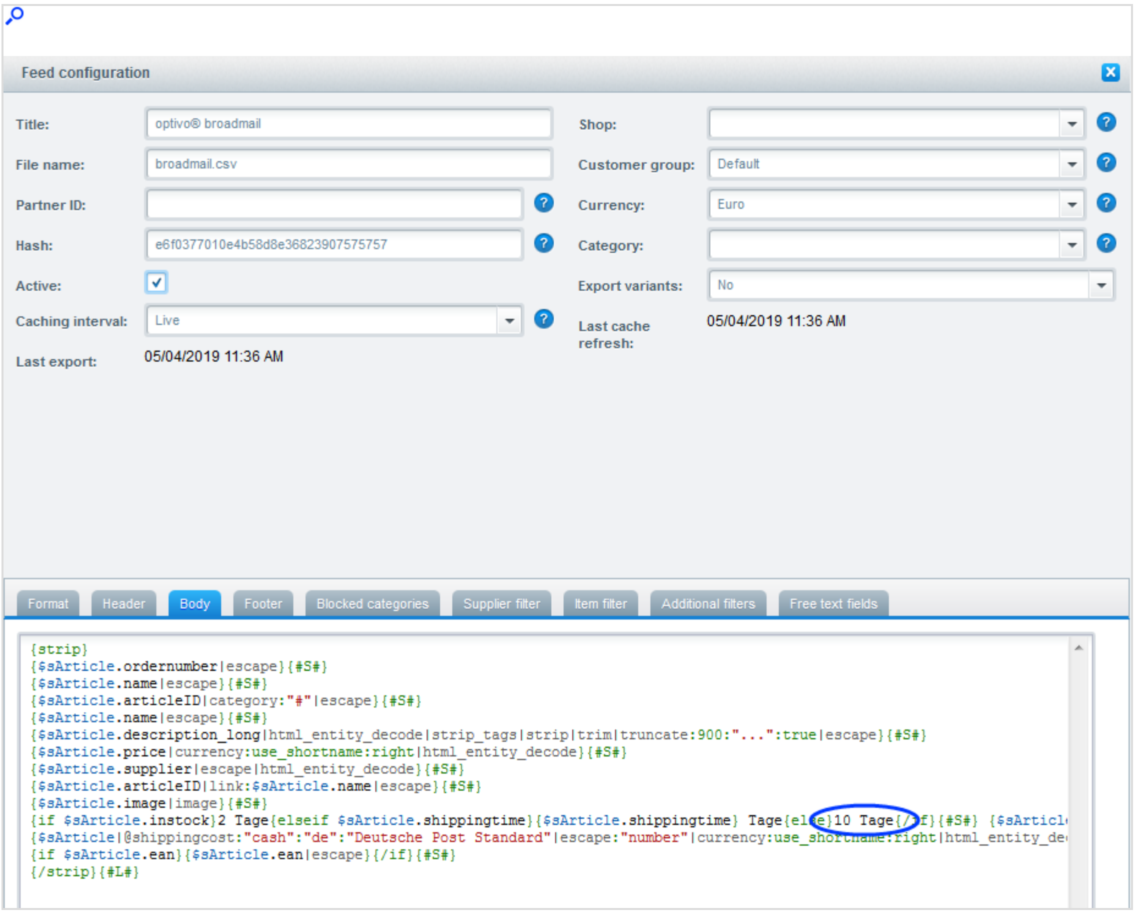
Title	File name	Number of items	Last export
Google Produktsuche	export.txt	0	01/01/2000 12:00 AM
Kelkoo	kelkoo.csv	0	01/01/2000 12:00 AM
billiger.de	billiger.csv	0	01/01/2000 12:00 AM
Idealo	idealo.csv	0	01/01/2000 12:00 AM
Yatego	yatego.csv	0	01/01/2000 12:00 AM
schottenland.de	schottenland.csv	0	01/01/2000 12:00 AM
guenstiger.de	guenstiger.csv	0	01/01/2000 12:00 AM
geizhals.at	geizhals.csv	0	01/01/2000 12:00 AM
Ciao	ciao.csv	0	01/01/2000 12:00 AM
Pangora	pangora.csv	0	01/01/2000 12:00 AM
Shopping.com	shopping.csv	0	01/01/2000 12:00 AM
Hitmeister	hitmeister.csv	0	01/01/2000 12:00 AM
evendi.de	evendi.csv	0	01/01/2000 12:00 AM
affili.net	affilinet.csv	0	01/01/2000 12:00 AM
Google Produktsuche XML	export.xml	0	01/01/2000 12:00 AM
preissuchmaschine.de	preissuchmaschine.csv	0	01/01/2000 12:00 AM
RSS Feed-Template	export.xml	0	01/01/2000 12:00 AM
optivo® broadmail	broadmail.csv	14	05/04/2019 11:36 AM

4. In the **Format** tab, in the **Encoding** drop-down list, select **UTF-8**.



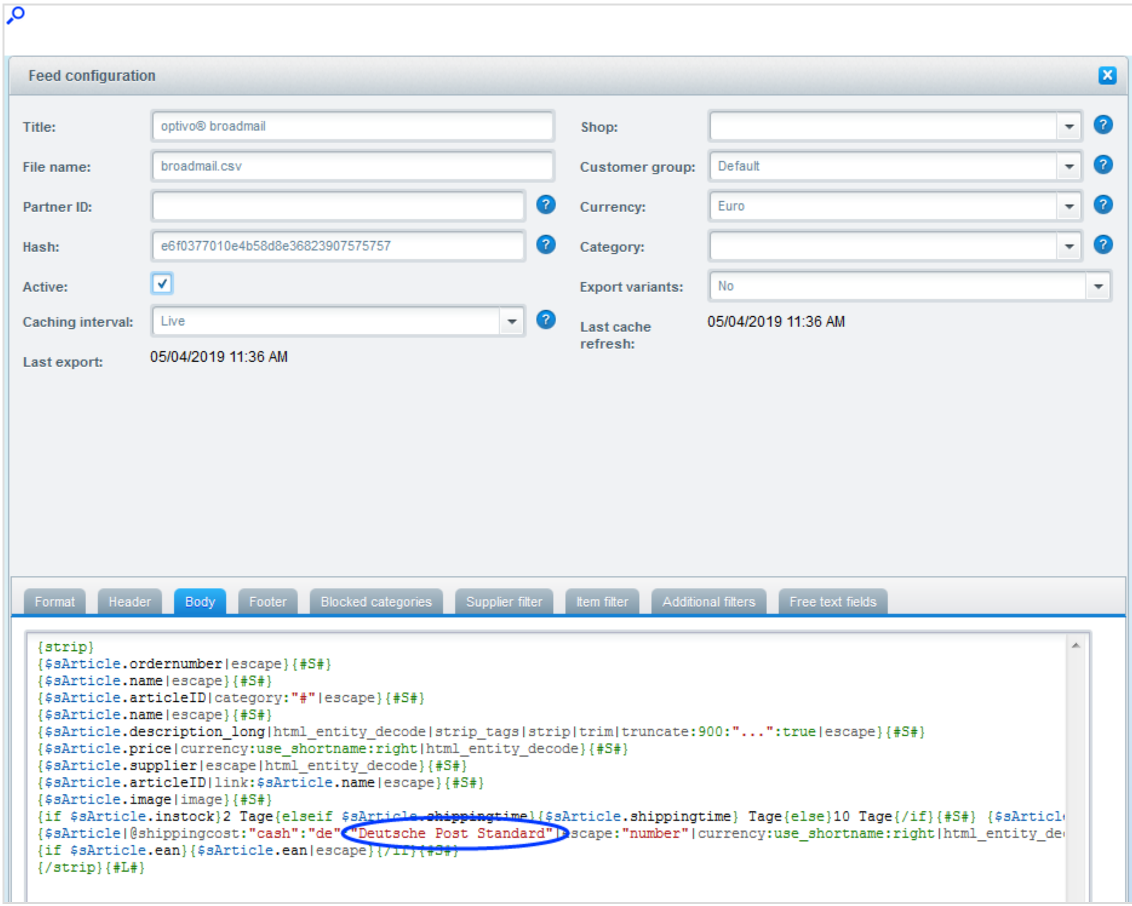
> **Note:** Entries in the **Header** and **Body** tabs were created by the Shopware integration at the time of installation and are required for the product data exchange with the content interface. Do *not* change the entries in the **Header** tab. You can change the **Body** tab as needed in steps 5 and 6.

5. Optional: In the **Body** tab, adjust the sending time by changing the number of days (10 by default).



> **Note:** Do **not** change the variables and the filters used (such as **|escape**).

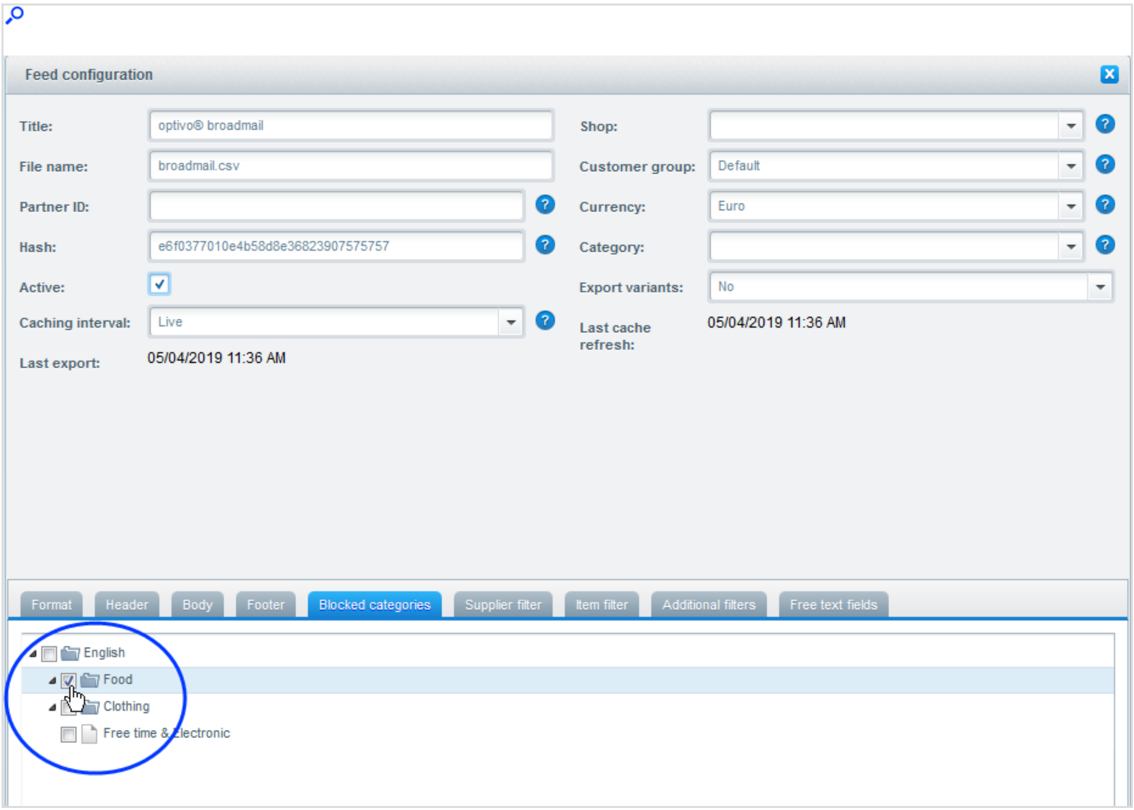
6. Optional: In the **Body** tab, change the shipping service provider and the shipping method.



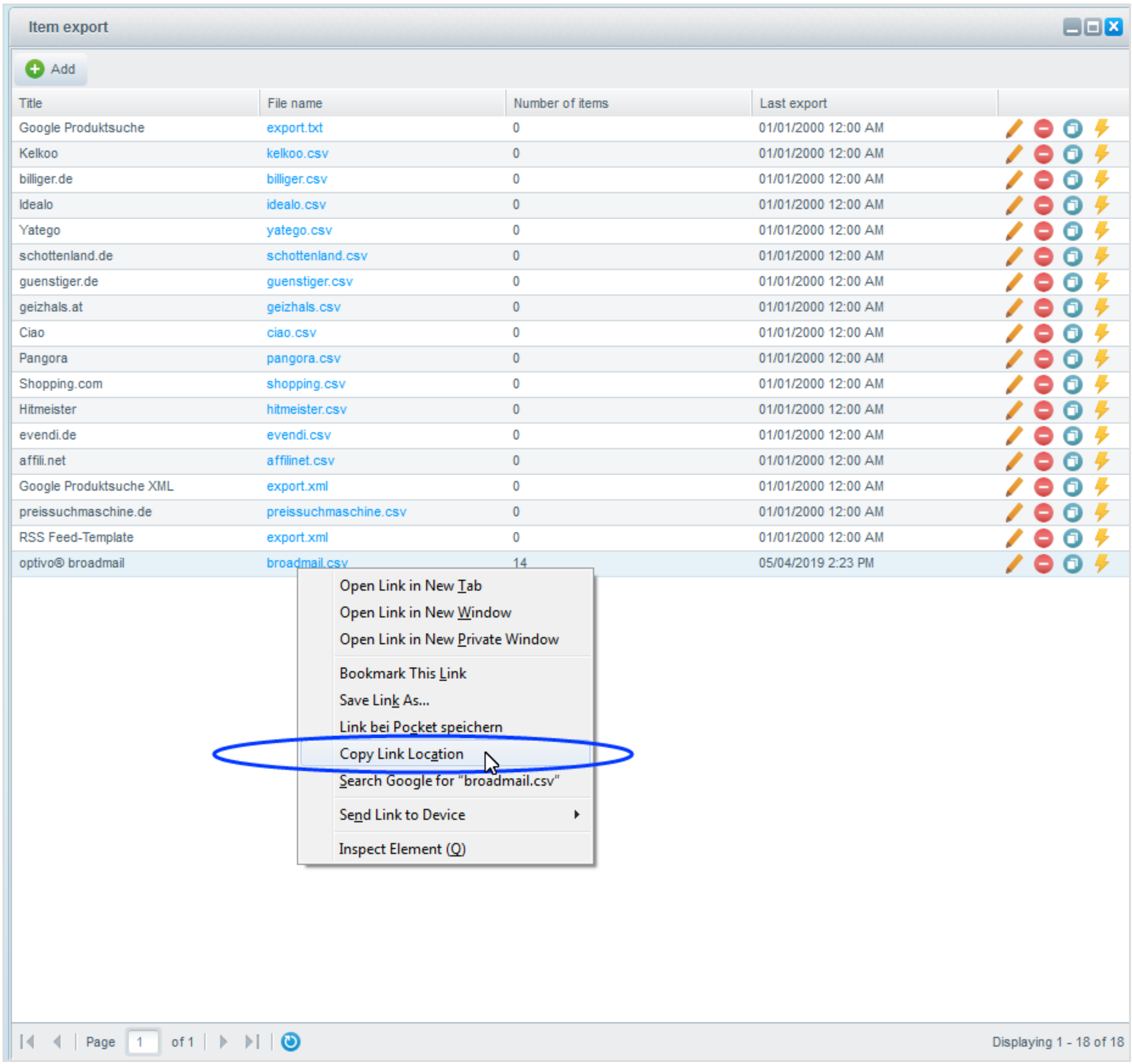
> **Note: Deutsche Post Standard** is the default shipping service provider and shipping method.

> **Note:** Do *not* change the variables and the filters used (such as **|escape**).

7. To exclude product categories from being transferred to Optimizely Campaign in the catalog export, open the **Blocked categories** tab and select the corresponding check box.



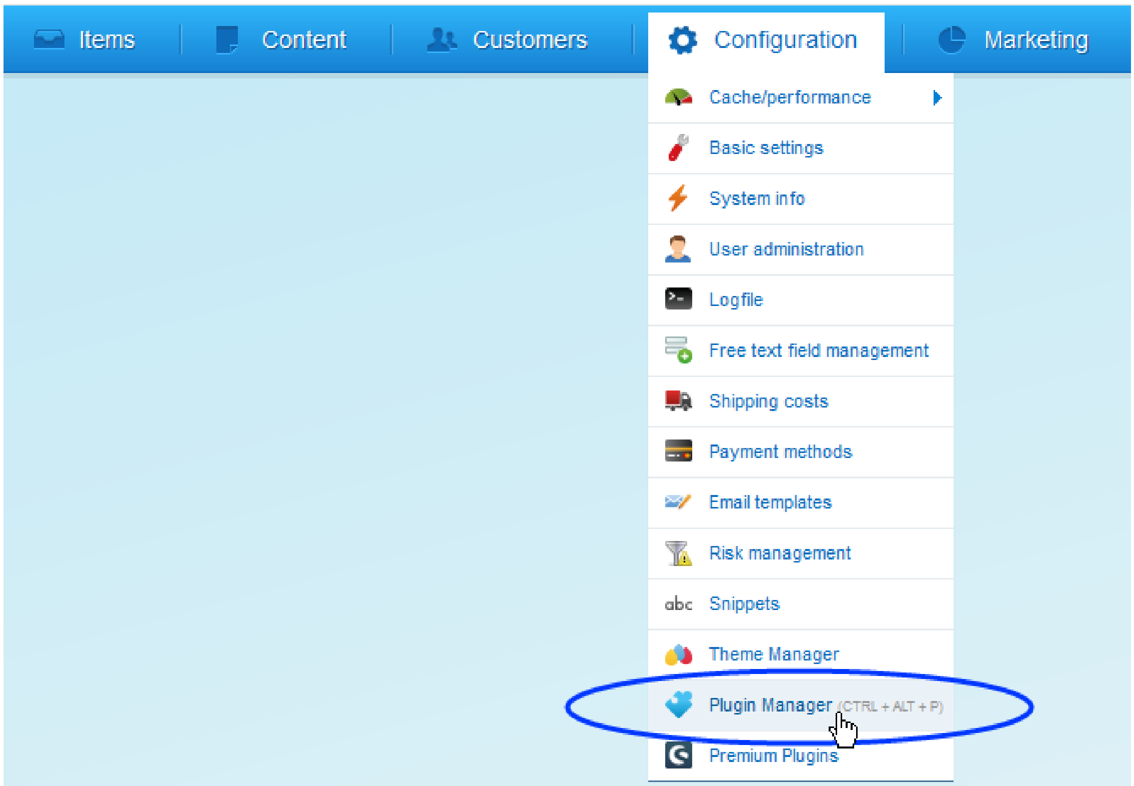
8. Click **Save and Close**.
9. Find the **optivo broadmail** feed and right-click the file name in the **File name** column. In the context menu of your browser, select the option **Copy link location**.



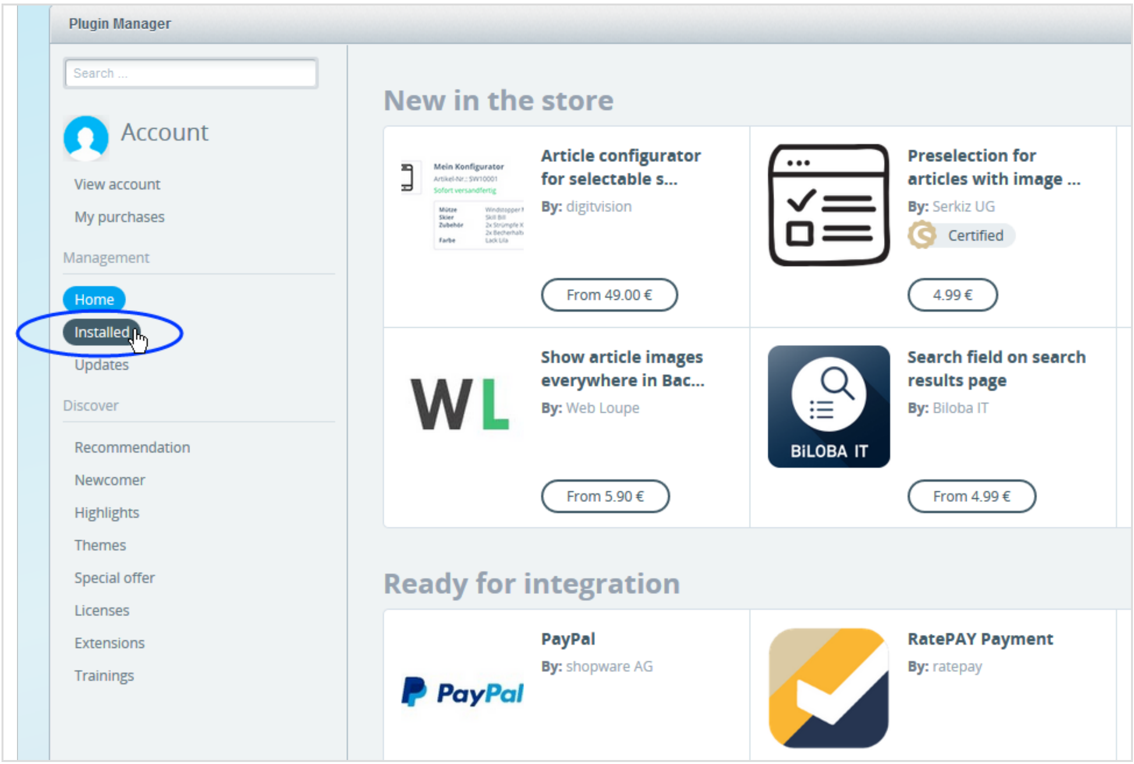
10. Copy the **Feed** URL to your clipboard, or save the URL in a text document.

Step 2. Configuring Shopware integration for catalog export

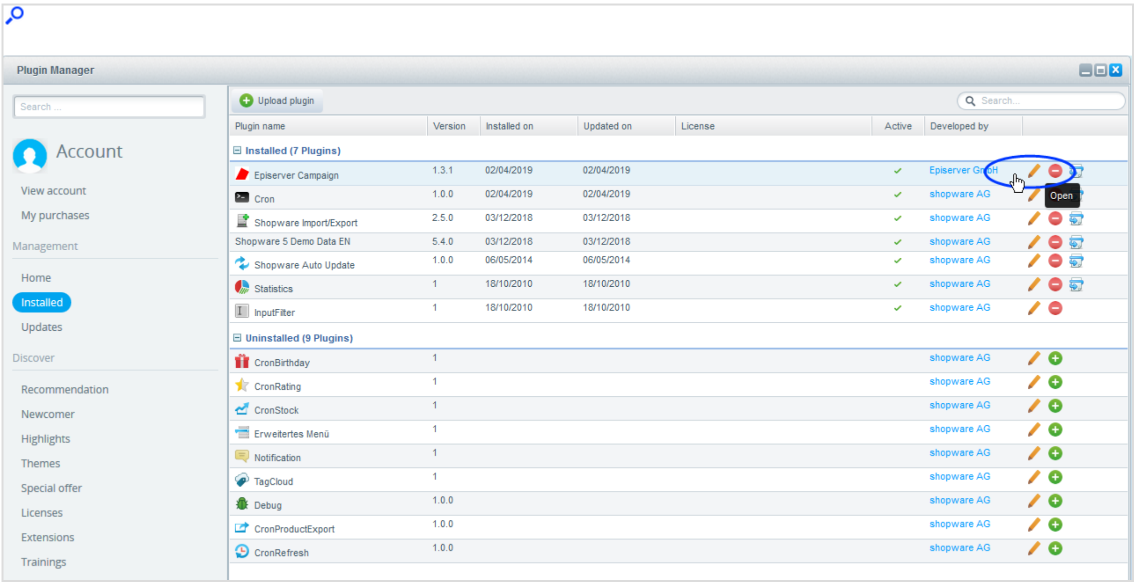
1. In Shopware, go to **Configuration** > **Plugin Manager**.



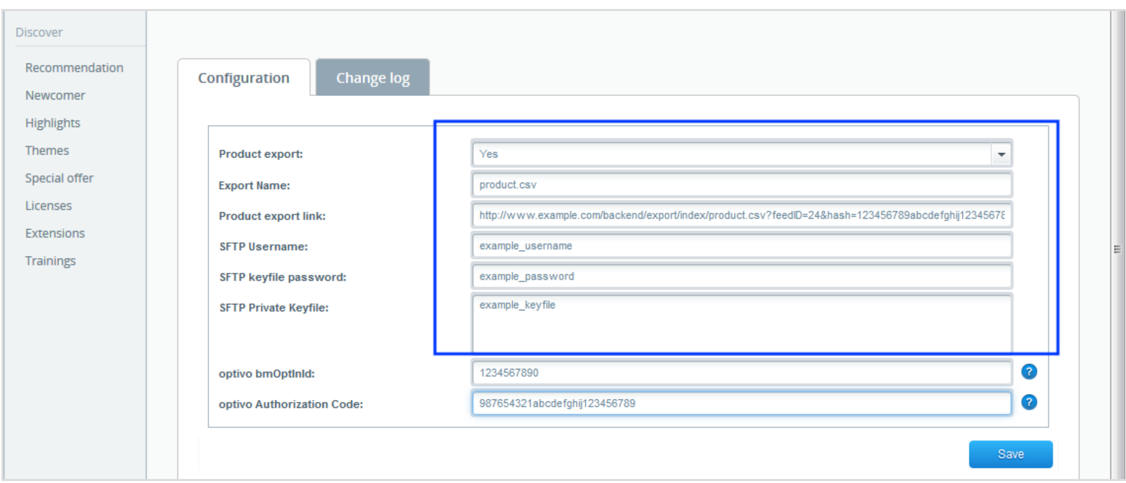
2. On the left side of the menu bar, click **Installed**.



3. Find the Shopware integration for **Episerver Campaign** in the Plugin Manager, and click **Open** .



4. In the **Configuration** area, insert the data below:



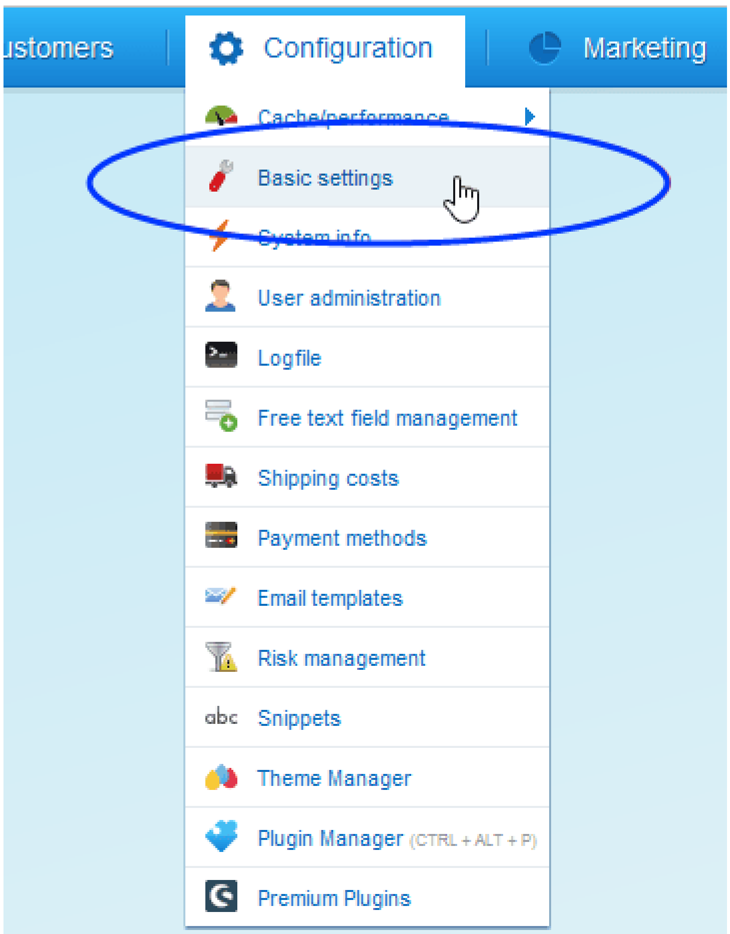
- **Product export**. Select **Yes.**
- **Export Name**. Enter the file name for your catalog export.
- **Product export link**. Enter the URL of the feed for your catalog export.
- **SFTP Username**. Enter the user name for your Optimizely server account.
- **SFTP keyfile password**. Enter the password for your private SSH key.
- **SFTP Private Keyfile**. Enter your private SSH key.

5. Click **Save**.

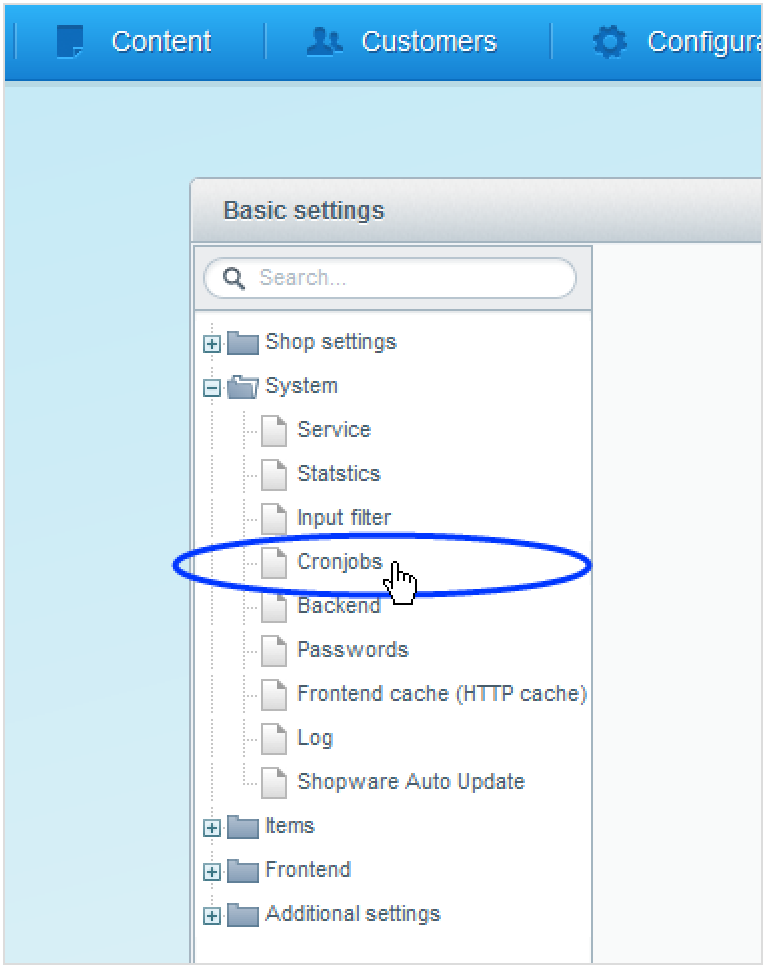
Step 3. Configuring and activating the Cron job

To automate daily catalog exports, you must configure and activate the Cron job **Episerver Campaign Product Export** in Shopware.

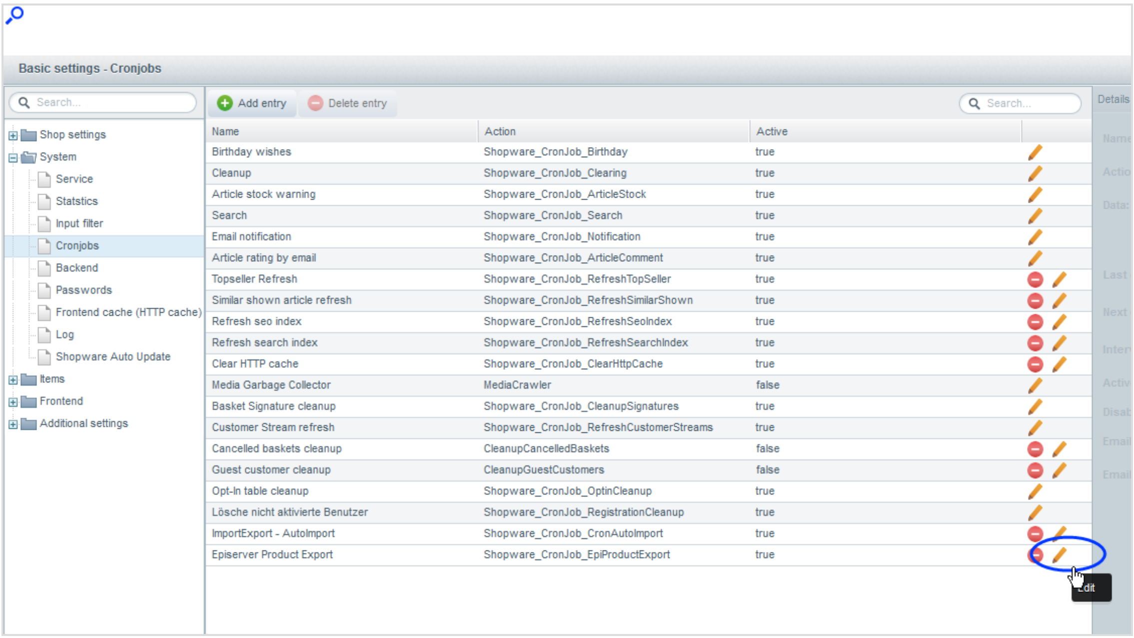
1. In Shopware, go to **Configuration** > **Basic settings**.



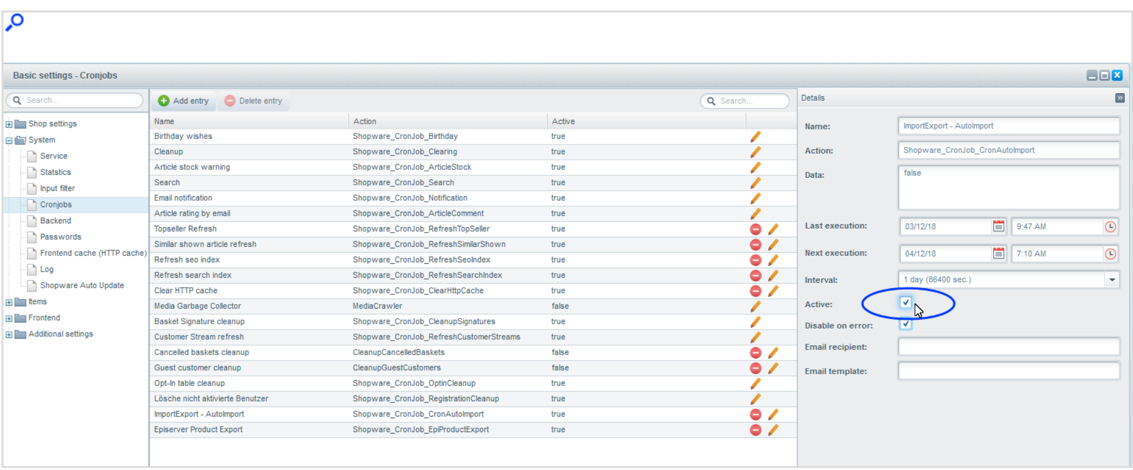
2. Go to **System** > **Cronjobs**.



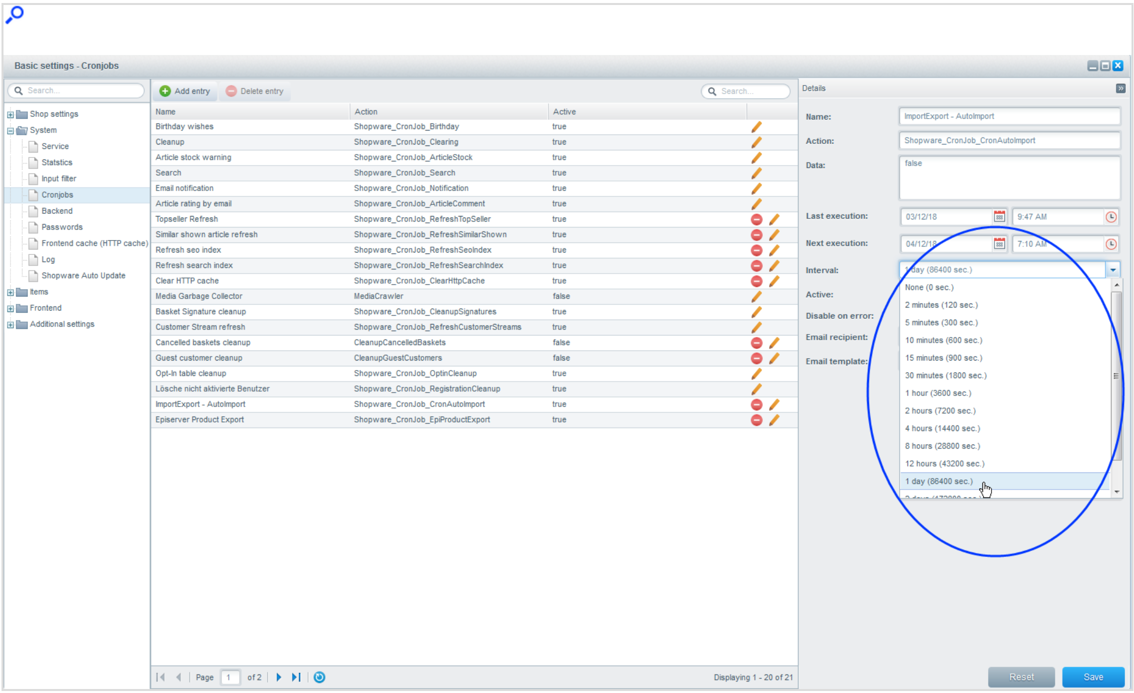
3. In the list, find the Cron job **Episerver Campaign Product Export** and click **Edit** .



4. Select **Active**.



5. In the **Interval** drop-down list, select a time interval, such as 1 day.



6. Click **Save**.
7. To activate the Cron job and start the automatic schedule, invoke the URL. Typically, this is something like: `http://<your store URL>/backend/cron`.

> **Note:** When the URL is invoked, you can find the job in the list of running Cron jobs under the **Processing Episerver Campaign Product Export** (if the execution is scheduled).

Advanced configuration

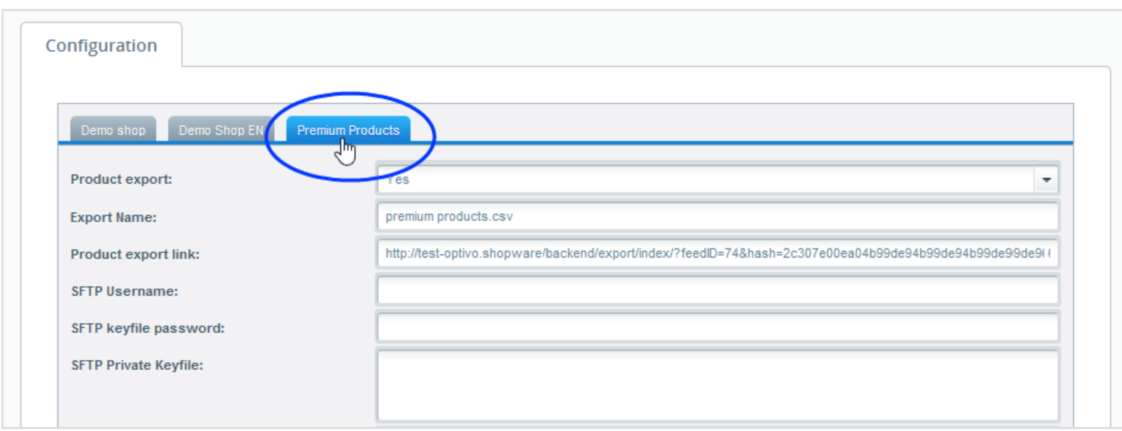
> **Note:** This topic is for administrators and developers with administration access rights in Shopware.

This topic describes how to individually configure multiple shops, opt-in mailings, language versions, front-end messages, and catalog exports, when using Shopware as e-commerce platform with Optimizely Campaign. Contact customer support for advise regarding setup of multiple shops with separate clients for transactional mails, and recipient list-based newsletter subscriptions.

Configuring individual opt-in mailings and catalog exports

To configure an individual catalog export or a language version of your shop, you must create a separate feed in Shopware; see Configuring the catalog export. Specify a **unique** file name for the catalog export, or language version, of your main shop (for example **products_fr.csv** for French). Do *not* use the same file name because the individual catalog exports will overwrite each other.

1. Log in to the back-end of Shopware with administrator rights.
2. Go to **Configuration** > **Plugin Manager**.
3. Click **Installed**.
4. Find the Shopware integration for **Optivo broadmail** in the Plugin Manager, and click **Edit** . If you have configured multiple shops, these are displayed in individual tabs under **Configuration**.
5. Click the tab of the shop to configure.

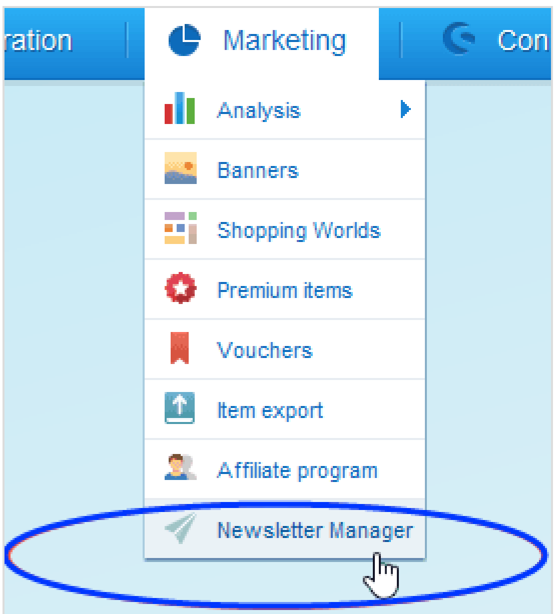


6. Enter the desired settings.
7. Click **Save**.

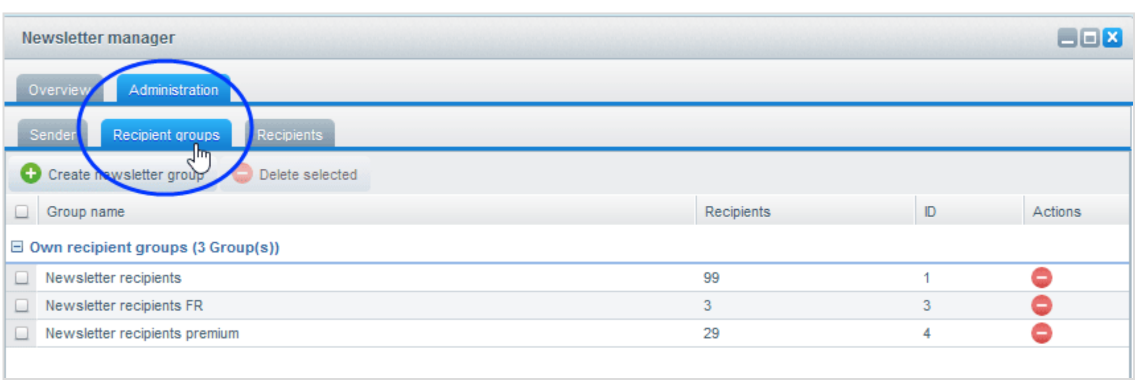
Configuring multiple newsletter subscriptions

By default, the Shopware integration supports registering for one newsletter per email address. If a recipient registers with the same email address for another newsletter, including that of a sub-shop or different language for the shop, no opt-in operation is triggered. Configure *recipient groups* to allow multiple newsletter subscriptions.

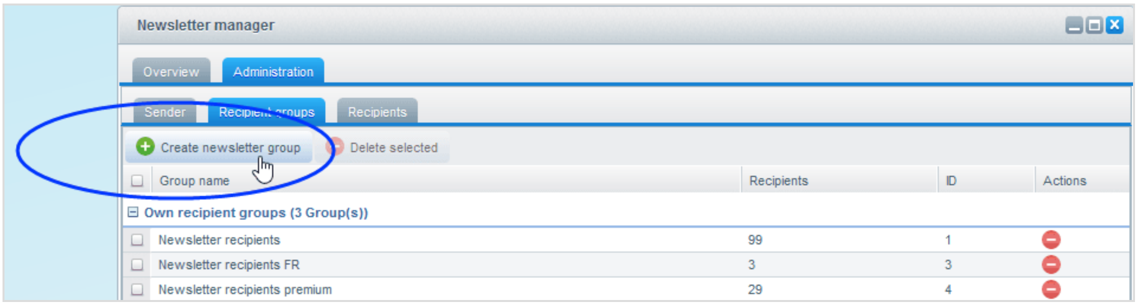
1. In Shopware, go to **Marketing** > **Newsletter Manager**.



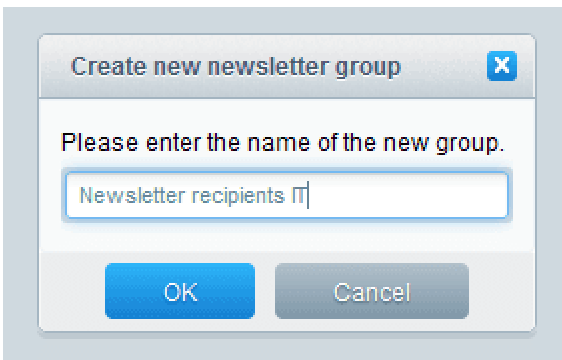
2. Open the **Administration** > **Recipient groups** tab.



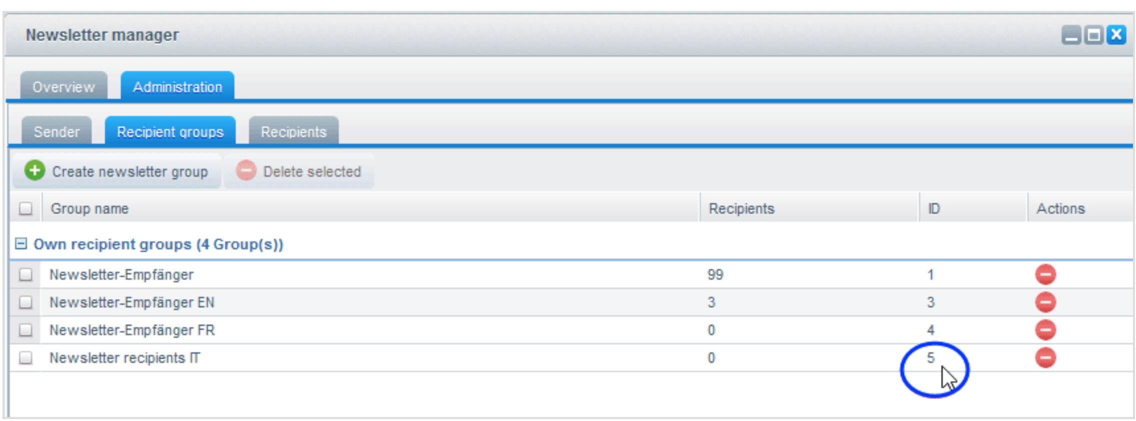
3. Click **Create newsletter group**.



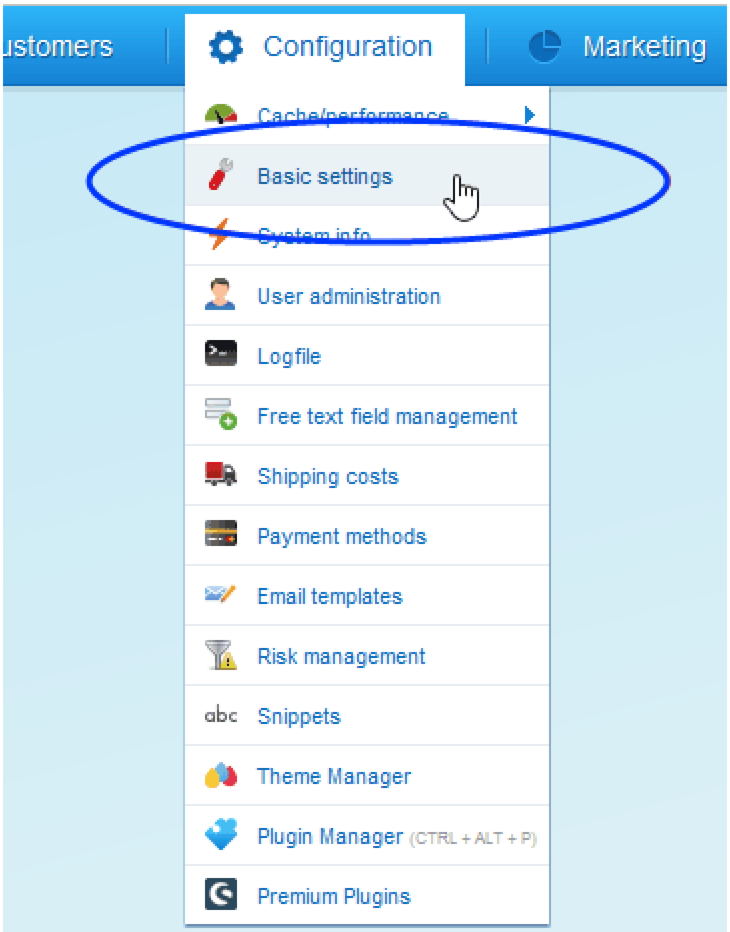
4. Specify a descriptive name for the recipient group, such as *Newsletter recipients IT*.



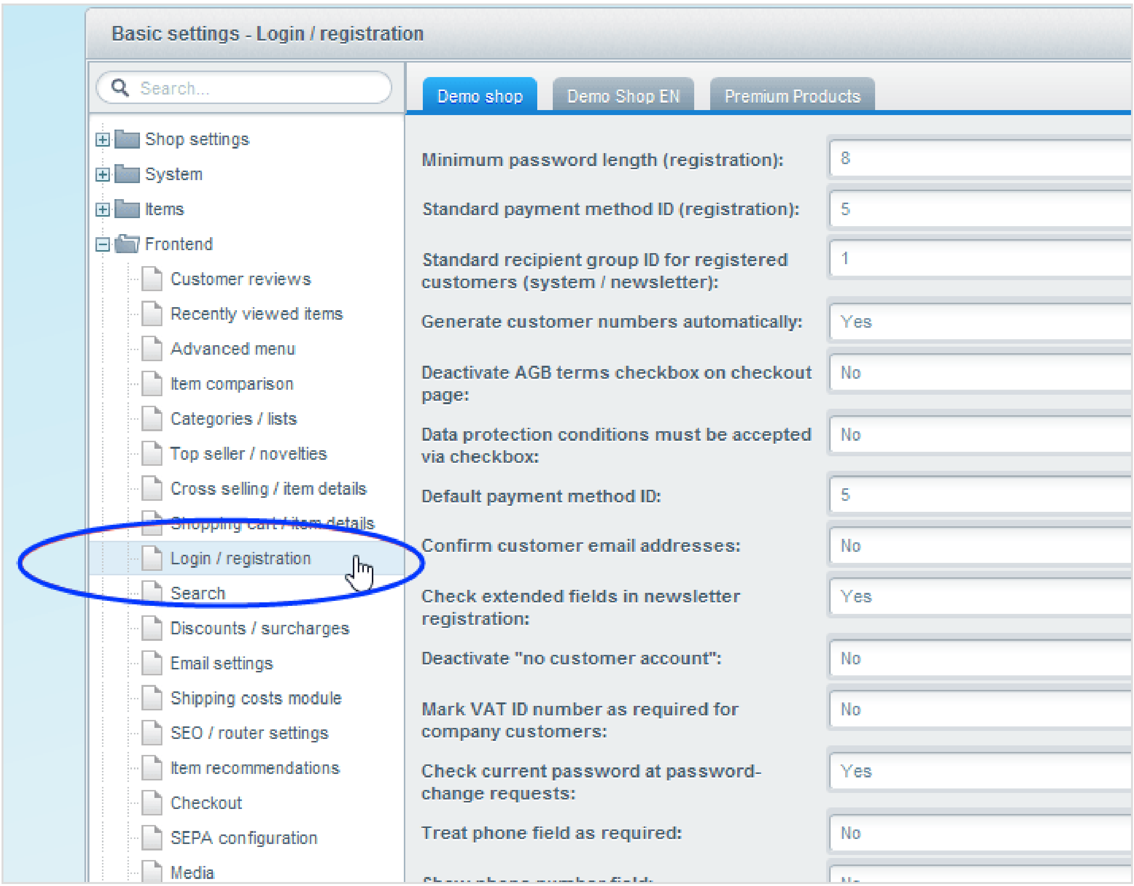
5. Click **OK**.
6. From the **ID** column, note the ID of the new recipient group.



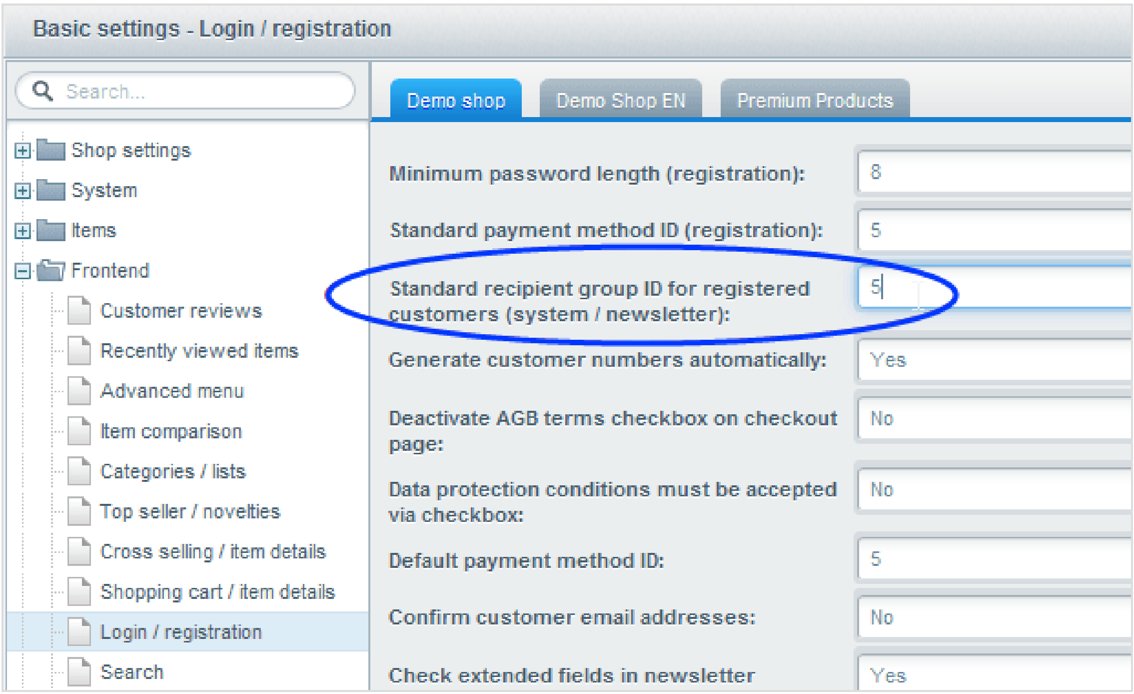
7. Go to **Configuration** > **Basic settings**.



8. Go to **Frontend** > **Login / registration**.



9. Open the tab for the sub-shop/language version of the main shop for which to create a recipient group.
10. In **Standard recipient group ID for registered customers (system / newsletter)**, enter the ID from step 6.

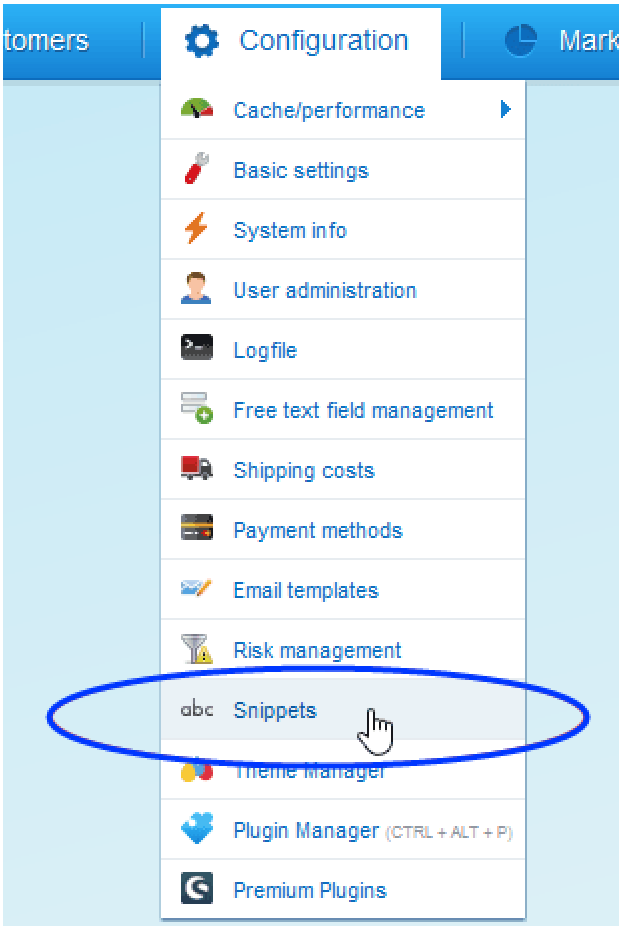


11. Click **Save**.

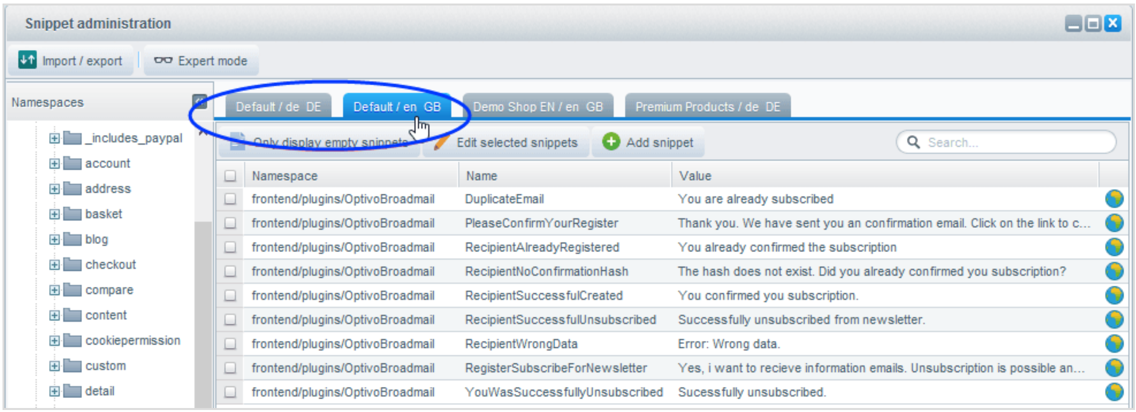
Adapting front-end messages

To translate or change front-end messages displayed to website visitors, such as when subscribing or unsubscribing, you can modify integration text files. The integration supports localization features in Shopware, and there are several standard texts in German and (British) English that you can modify.

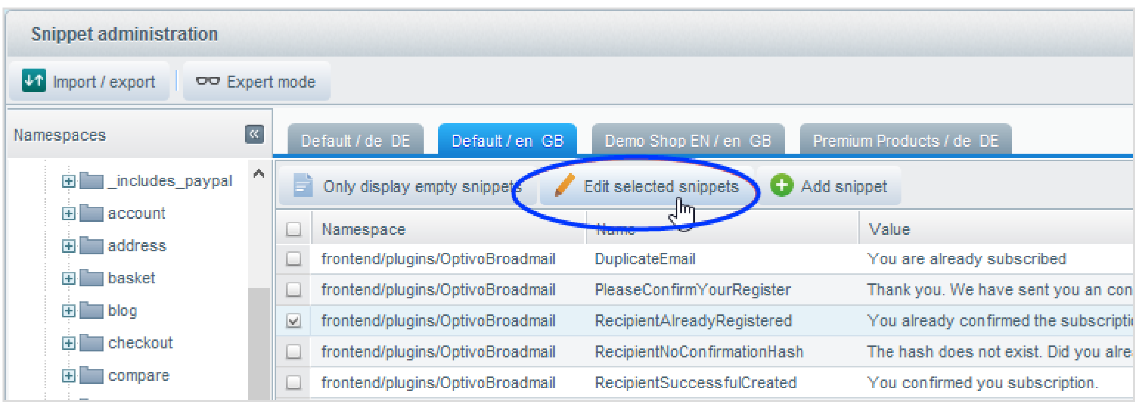
1. Log in to the back-end of Shopware with administrator rights.
2. Go to **Configuration** > **Snippets**.



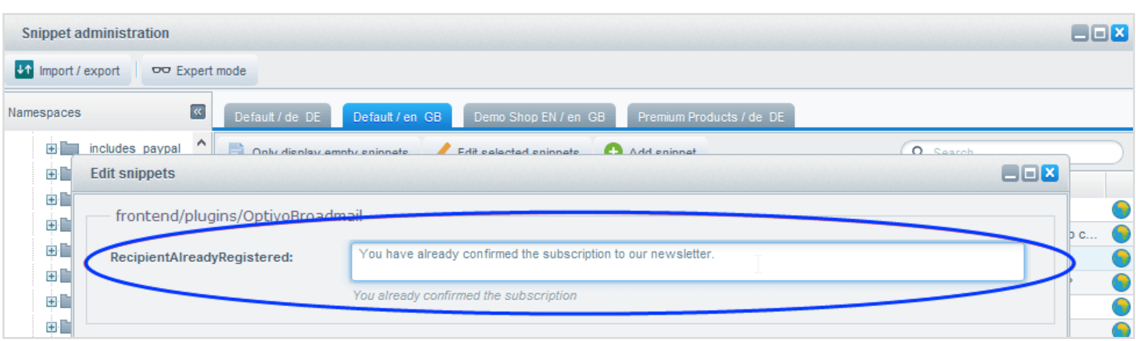
3. Go to **Namespaces** > **frontend** > **plug-ins** > **Optivo broadmail**. Switch between available messages under the **Default / de DE** and **default / en GB** tabs.



4. Select the message to edit, and click **Edit selected snippets**. The **Edit snippets** window opens.



5. Change the message.



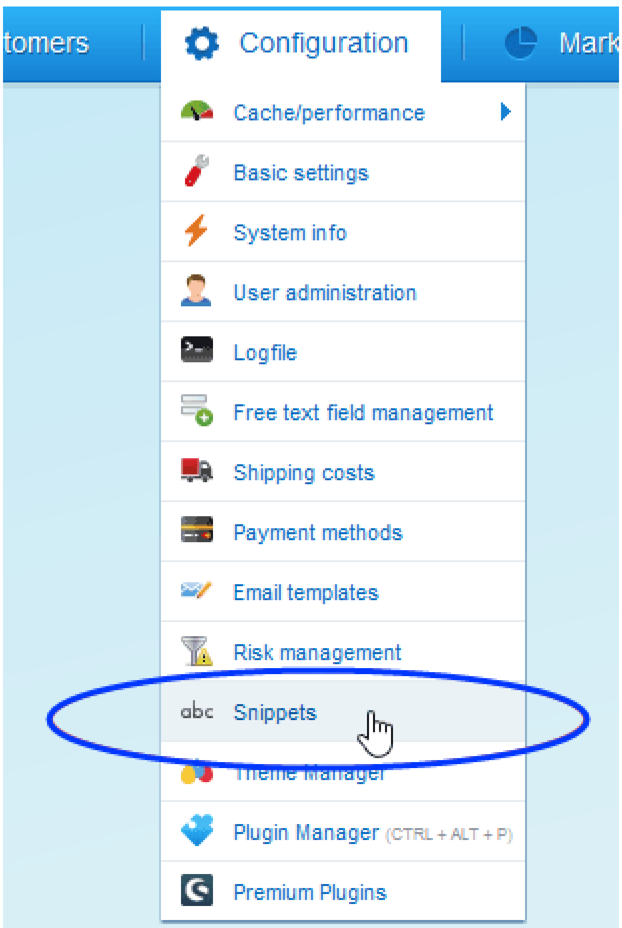
6. If you have other languages in Shopware, the text elements for the other languages are empty. Insert the corresponding translations for these.

7. Click **Save**.

Customizing and localizing salutations

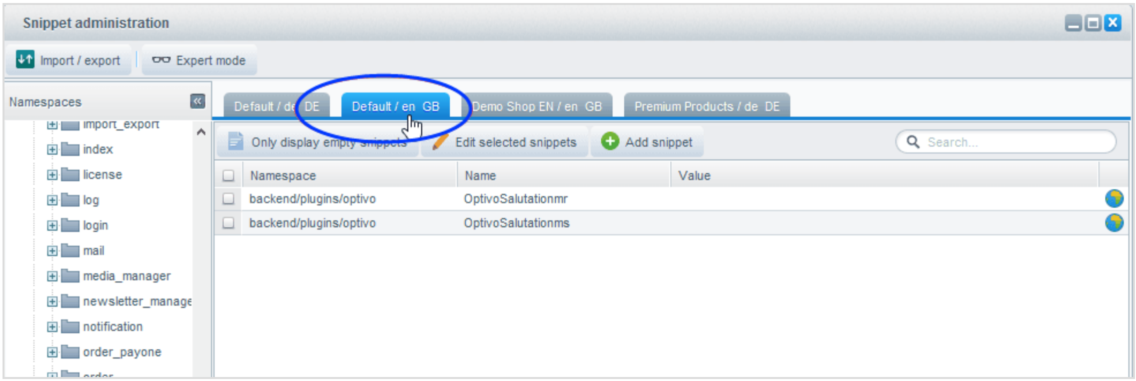
You can customize and localize the texts in the Optimizely Campaign recipient list field **salutation** for individual subshops or language versions of your shop. By default, the German salutations *Frau* and *Herr* are transmitted to Optimizely Campaign.

1. Go to **Configuration** > **Snippets**.

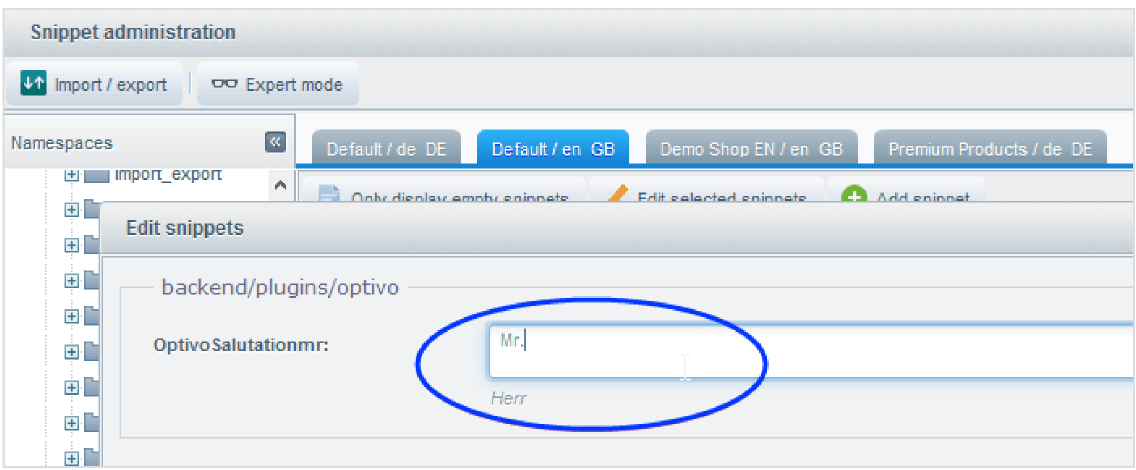


2. Go to **Namespaces** > **backend** > **plugins** > **optivo**.

3. Select the tab of the corresponding shop for which you want to change the salutation.



4. Select the salutation to modify, and click **Edit selected snippets**.
5. Enter the salutation.



6. Click **Save**.

Troubleshooting

> **Note:** This topic is for administrators and developers with administration access rights in Shopware.

This topic describes how to manage integrated-related issues when using Shopware as e-commerce platform with Optimizely Campaign. Find out how to get help with Shopware problems during installation and configuration, and how to initiate the logging of events and executed tasks to monitor operations and to locate error sources.

Installation issues

If problems occur during installation, configuration, and operation that you cannot solve, contact customer support.

Common sources of errors

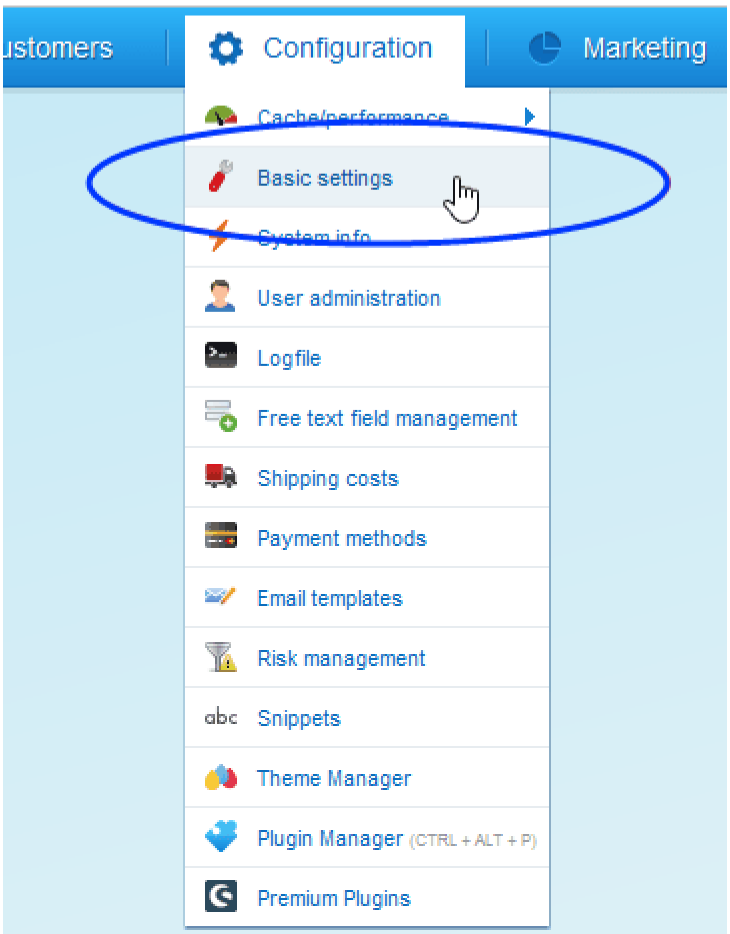
Problem	Possible cause	Solution
Customers cannot subscribe to newsletter.	The shop system's firewall is blocking the connection to Optimizely Campaign.	Check the network configuration for your shop system.
	The authorization code of the recipient list is invalid.	Check the authorization code of the recipient list and create a new authorization code if necessary.
	The opt-in ID is invalid.	Check and correct the opt-in-ID.
The catalog export fails.	The shop system's firewall is blocking the connection to Optimizely Campaign.	Check the network configuration for your shop system.
	The private SSH key is incomplete or incorrect.	Re-enter the SSH key.
	The password for the private SSH key is incomplete or incorrect.	Re-enter the password for the private SSH key.

Logging

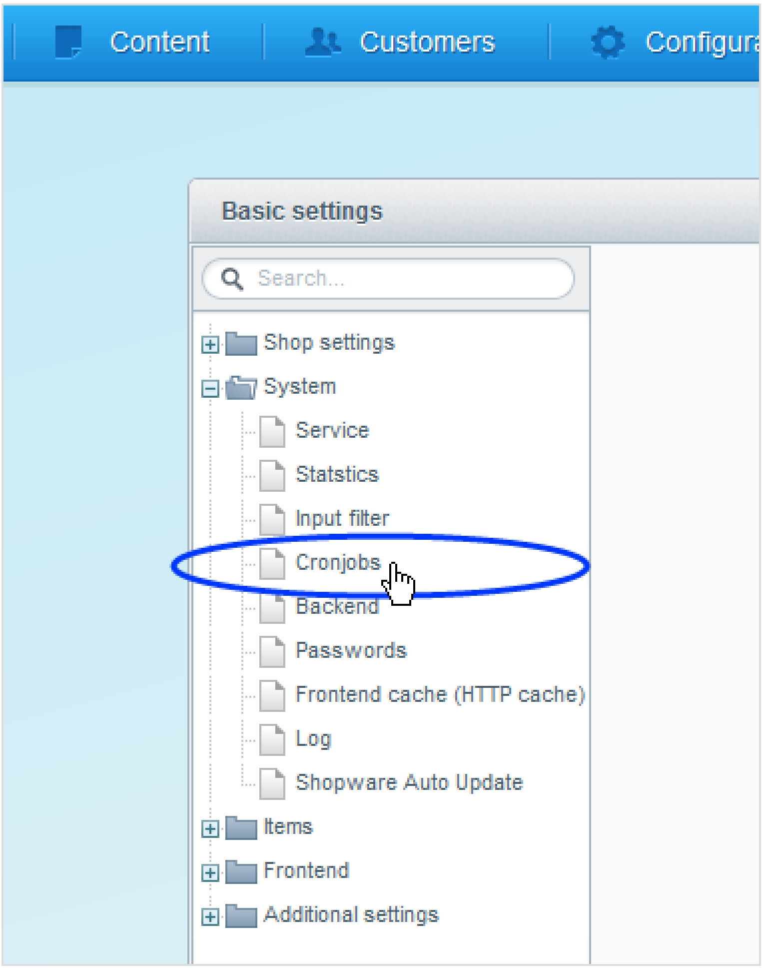
The Shopware integration contains a feature for logging events and executed tasks, including the catalog export. If there are issues with the integration, use log files to find the sources of error. To access the logging, you need to activate a **Cron job** in Shopware.

Configuring the logging

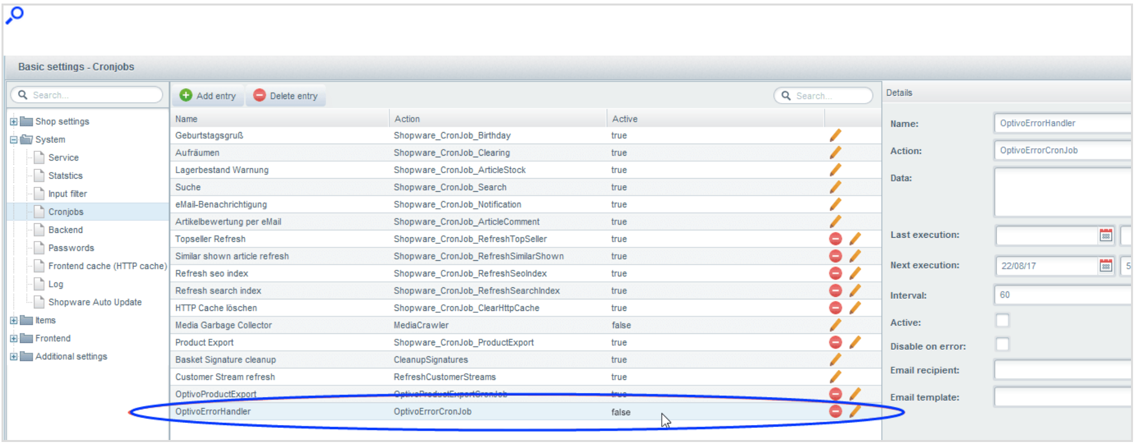
1. Log in to the back end of Shopware with administrator rights.
2. Go to **Configuration** > **Basic settings**.



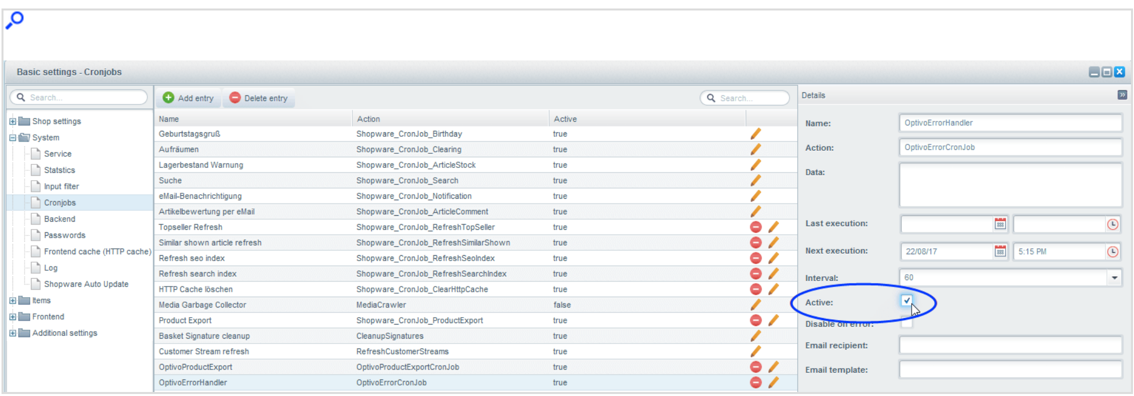
3. Go to **System** > **Cronjobs**.



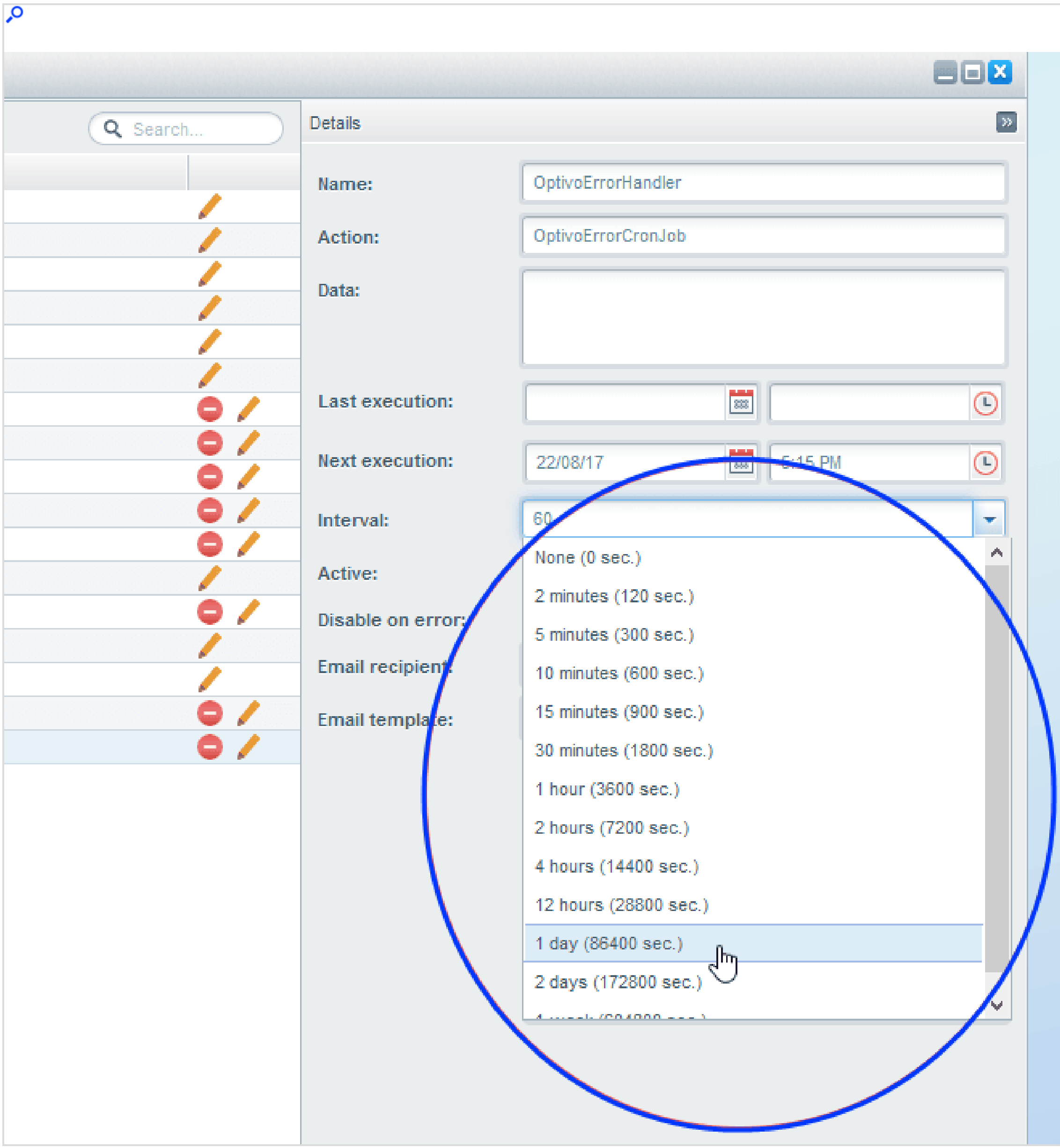
4. In the list, find the Cron job **optivo ErrorHandler** and click **Edit** .



5. Select the **Active** check box.



6. In the **Interval** drop-down list, select a time interval for the Cron job. This is used to determine the intervals at which individual log records are grouped together.

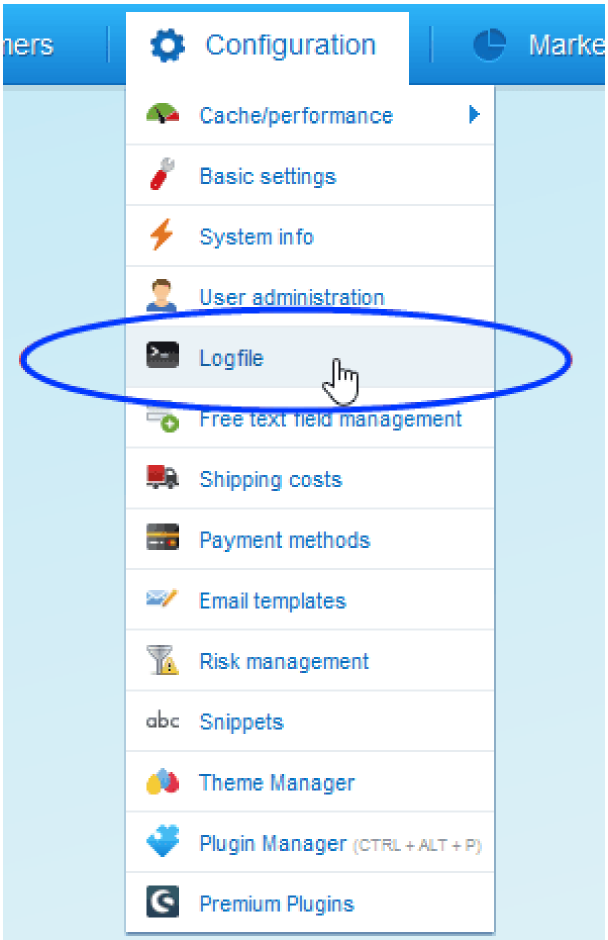


7. Click **Save**.
8. To activate the Cron job and start logging, invoke the URL. Typically, this is something like `http://<your store URL>/backend/cron`.

> **Note:** In the list of Cron jobs, you see the entry **Processing Optivo ErrorHandler** (if the job execution is initiated by its interval settings).

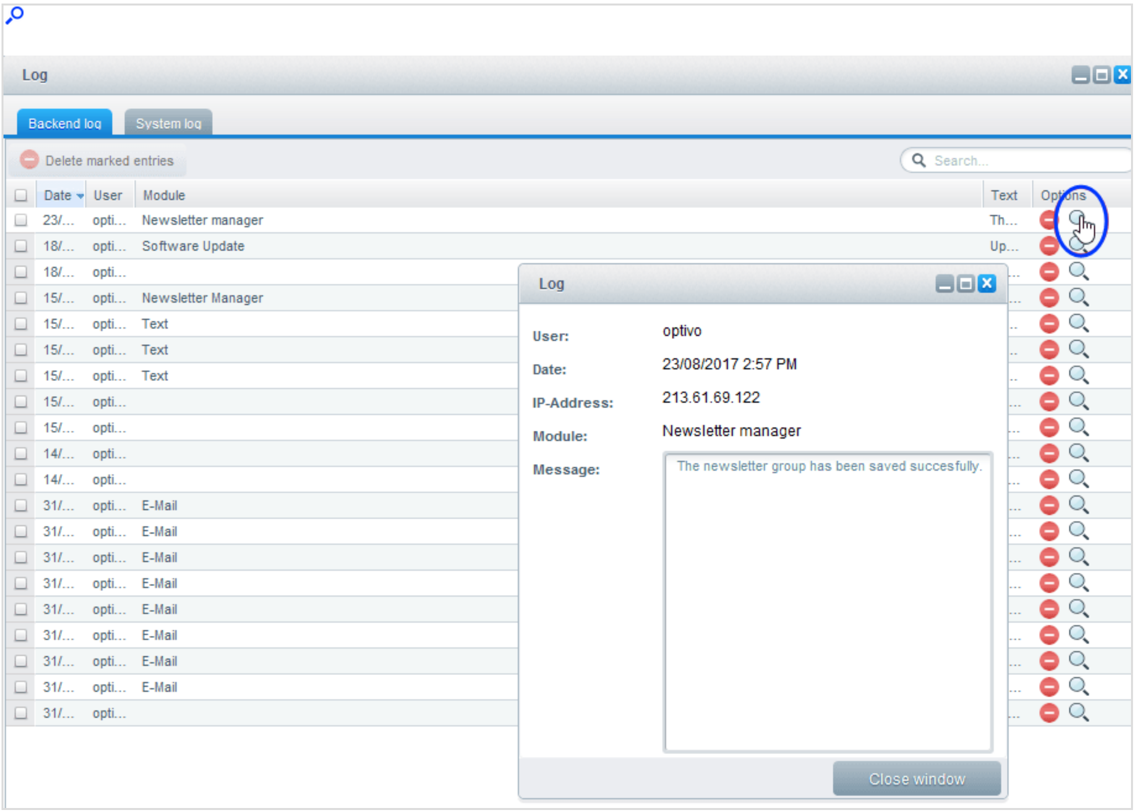
Accessing the back-end log

1. Select **Configuration** > **Logfile**.



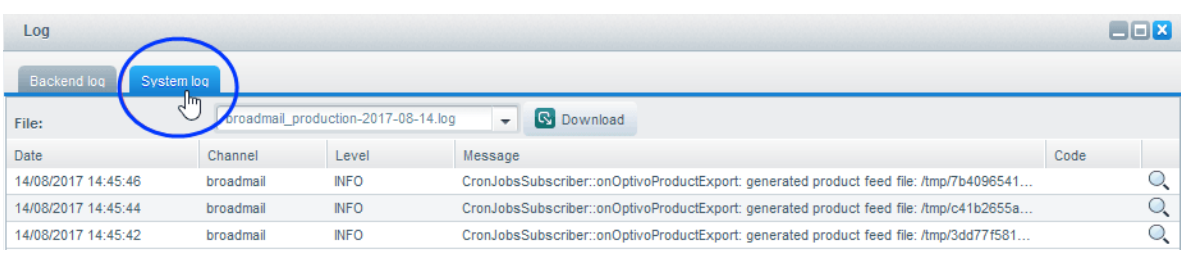
2. Copy the logged events from the list, and click **Details** (the magnifying glass icon) in the **Options** column. Entries added by the Shopware integration can be identified by

the name **optivo** under **User**.



Log files in the system log

The Shopware integration writes messages to the **broadmail** channel in the **System log** tab. Here you will find the most recent entries that have not been archived by the Cron job.



Click **Details** (the magnifying glass icon) to see error message details.

Example: The following message indicates that the product export started, but execution failed because a user ID is missing from the Shopware integration settings.

```
CronJobsSubscriber::onoptivoProductExport: missing export sftp username
```

To see archived entries, select a log file from the drop-down list next to **Download**. To save a log file to your computer, click **Download**.

> **Note:** If you receive PHP programming language error messages, send screenshots of these together with a description of the process that was running when the error occurred to Optimizely customer support. You may also have to provide Optimizely with the exact error messages in the Linux system log file.

Spryker integration

> **Note:** This topic is for administrators and developers with administration access rights in Spryker.

This topic gives you an overview of the Spryker integration with Optimizely Campaign. With the Spryker integration, you can reliably manage your advertising consent: your customers can sign in to your newsletter directly in your Spryker shop and unsubscribe simply by clicking the unsubscribe link in the newsletter.

The Spryker integration provides the following features:

- Newsletter subscription and unsubscribes
- Transactional mails via HTTP API

Setting up Optimizely Campaign

To set up the Spryker integration in your client, contact customer support.

Preparing recipient lists

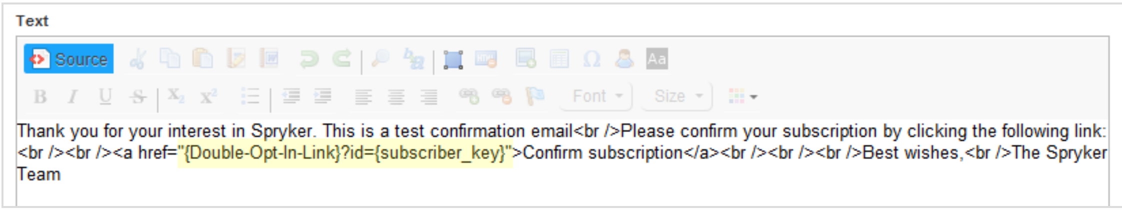
Provide Optimizely with the names of your Optimizely clients. Customer support adapts the recipient lists to the Spryker integration.

> **Note:** A recommended client setup uses two separate clients: one for sending newsletters and the other for sending transactional mails. Optimizely offers a standard template for the required recipient lists that is suitable for many applications and scenarios. To check if the standard template meets your requirements, contact customer support.

Referencing opt-in emails to Spryker

After customers have subscribed to the newsletter in your Spryker shop, Optimizely Campaign sends a registration confirmation with a confirmation link that completes the newsletter registration process. To reference the confirmation link to Spryker, adjust the field function in the confirmation link.

1. Open the Optimizely Campaign menu and select **Campaigns** > **Opt-in Processes**.
2. Select the opt-in email that is to reference to your Spryker shop.
3. Click **Edit**.
4. In the **Edit confirmation mailing** window, hover over the message node and click **Properties** .
5. Click **Edit content**.
6. In the **Edit content** window, click the name of the paragraph that contains the confirmation link.
7. In the right **Content** area, in the **Text** field, click **Source** .
8. Replace the opt-in link with the following code: `{Double-Opt-In-Link}?id={subscriber_key}`



> **Note:** If you ordered a new confirmation mailing from customer support, the mailing is empty. Edit the mailing and insert the desired content. Use the code above for the double opt-in link.

9. Click **Apply** > **Close** > **Save and close**.

Setting up Spryker

Requirements:

- Credentials from your Optimizely client.
- Authorization codes of the recipient lists you are going to use. Open the Optimizely Campaign menu and select **Administration** > **API Overview** > **Recipient lists** > **Manage authorization codes**.
- Mailing IDs of the transactional mails you are going to use. Open the Optimizely Campaign menu and select **Campaigns** > **Transactional Mails**.

> **Tip:** If you are missing the **ID** column in the **Transactional mails** window, click the down arrow **v** in the upper right corner of the table header and activate the **ID** check box.

When you have the necessary information from Optimizely Campaign, follow the steps on the Spryker documentation website.

Configuring subscribes and unsubscribes

> **Note:** This topic is for administrators and developers with administration access rights in Spryker.

This topic describes how to configure the newsletter subscription and unsubscription feature, if you are using Spryker as an e-commerce platform with Optimizely Campaign. Learn which data fields are to be transmitted to Optimizely Campaign and how to reference the unsubscribe link in your newsletter to your Spryker e-commerce platform.

Transmitting registration data to Optimizely Campaign

The registration data is transmitted via HTTP request to Optimizely Campaign. The following data fields are transmitted:

Field name	Data type	Description	Mandatory field
email	String	Recipient's email address – also the recipient's unique ID	✓
salutation	String	Title (Mr/Ms) of the recipient	✗
firstname	String	Recipient's first name	✗
lastname	String	Recipient's last name	✗
customer_shop_locale	String	Language of the shop via which the customer has registered	✓ (transferred automatically)
spryker_id	String	Spryker-internal shop customer ID	✗
customer_shop_url	String	Shop URL of the customer	✓ (transferred automatically)
customer_login_url	String	Login URL of the customer	✓ (transferred automatically)

© Optimizely 2022

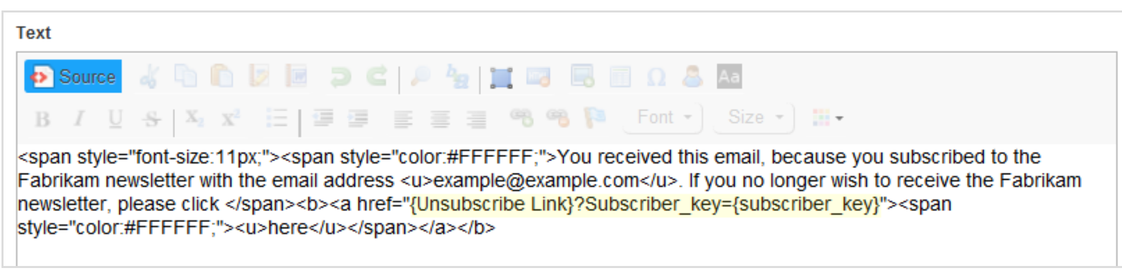
Field name	Data type	Description	Mandatory field
subscriber_key	String	Individual key of user in Spryker Commerce	✓ (transferred automatically)

Referencing the unsubscribe link to Spryker

Recipients of a commercial mailing must have the possibility to unsubscribe, see Deliverability best practices. Usually this is guaranteed by an unsubscribe link located in the footer of the newsletter. To redirect the unsubscribe link to Spryker, adjust the field function in the unsubscribe link.

> **Note:** This example refers to a message template. You must change the unsubscribe link in all mailings that have already been created but not yet sent.

1. Open the Optimizely Campaign menu select **Campaigns** > **Message Templates**.
2. Select the message template you want to edit, and click **Edit**.
3. In the **Edit message template** window, in the left **Edit** area, click the name of the paragraph that contains the unsubscribe link.
4. In the right **Content** area, in the **Text** field, click **Source**.
5. Replace the unsubscribe link with the following code: `{Unsubscribe Link}?Subscriber_key={subscriber_key}`



6. Click **Apply** > **Close** > **Save and close**.

Sending transactional mails

> **Note:** This topic is for administrators and developers with administration access rights in Spryker.

This topic describes how to configure sending of transactional mails when using Spryker as e-commerce platform with Optimizely Campaign. The sending is done via HTTP-API directly from Spryker.

You can use transactional mails to respond to customers' actions in your shop, such as order confirmations, or to send system emails, which include:

- Login confirmation
- Password changes and confirmation
- Order confirmations

Configuring transactional mails in Optimizely Campaign

Sending of transactional mails requires a template in Optimizely Campaign, which uses field functions to insert sent variables into relevant locations. This creates the finished transactional mail with layout, and sends it to the recipient. The sending and receiving of the content of the variables takes place using the transaction recipient list as a buffer.

1. The Spryker integration sends the variables.
2. The variables are written into the transaction recipient list: each variable into the relevant recipient list field.
3. Using field functions, Optimizely Campaign copies the template with the individual variables from the transaction recipient list and places it into the desired location in the transactional mail.

Recipient list fields in Optimizely Campaign's transaction recipient list

By default, the transaction recipient list contains the following fields.

Field name	Data type	Description
email	String	Email (required)
salutation	String	Title
firstname	String	First name
lastname	String	Last name
spryker_id	String	Spryker ID
customer_shop_locale	String	Language setting in customer shop
customer_shop_url	String	Customer shop url
customer_login_url	String	Customer login url
customer_reset_link	String	Customer reset link
language	String	Language

Field name	Data type	Description
order_number	String	Order number
order_comment	String	Order comment
order_orderdate	String	Order date
order_subtotal	String	Order Subtotal
order_discount	String	Discount on order
order_tax	String	Tax on order
order_grand_total	String	Total sum of order
order_total_delivery_costs	String	Delivery costs
order_total_payment_costs	String	Payment costs
subscriber_key	String	Individual key of user in Spryker Commerce

Creating a template in Optimizely Campaign

Create a template and add the desired transactional mail texts (the unchangeable, static texts that are to be sent to recipients). Insert field functions in places where you want to show content of the Spryker variables.

About field functions

Field functions are placeholders that refer to a specific recipient list field in your transaction recipient list. The variables and content of the variables sent from Spryker are written into the relevant recipient list fields in your transaction recipient list. Your field functions load relevant content from the referenced recipient list field in the next step.

Example

Set up a transactional mail text that welcomes each customer using the last name and the order date. For this you would need the variables **salutation**, **lastname** and **order_order-date**.

The content of the variables is first written to a relevant recipient list field of the transaction recipient list (from Spryker via the HTTP API). To access these recipient list fields, insert the individual field functions into the Optimizely Campaign template and place the name of the recipient list field in curly brackets. To import the variable contents, the static text and field functions in the Optimizely Campaign template could look like this:

`Hello, {salutation} {lastname}!`

`Thank you for your online order from {oder_orderdate}.`

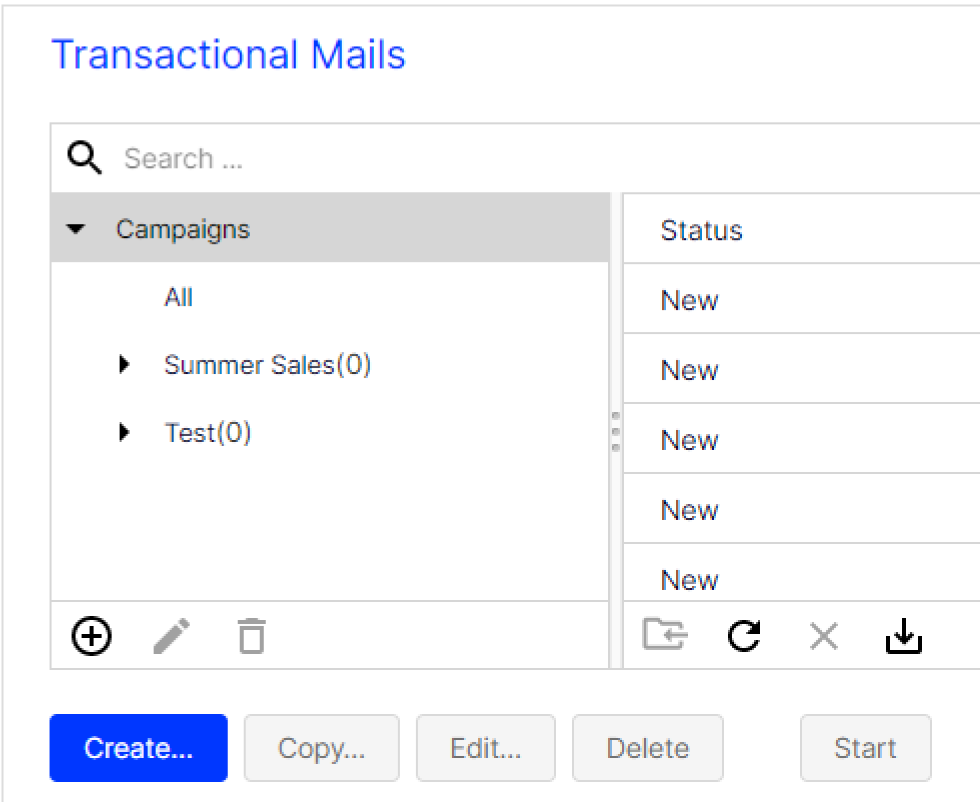
The example will appear in the sent transactional mail as follows:

Hello, Mr. Miller! Thank you for your online order from August 3.

To create the template, do the following:

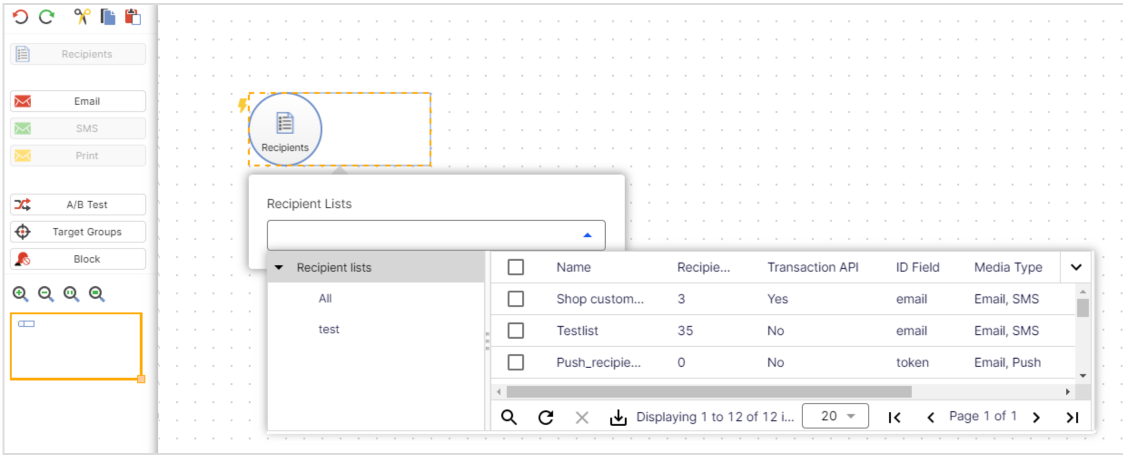
© Optimizely 2022

1. Open the Optimizely Campaign menu and select **Campaigns** > **Transactional Mails**.
2. Click **Create...**.



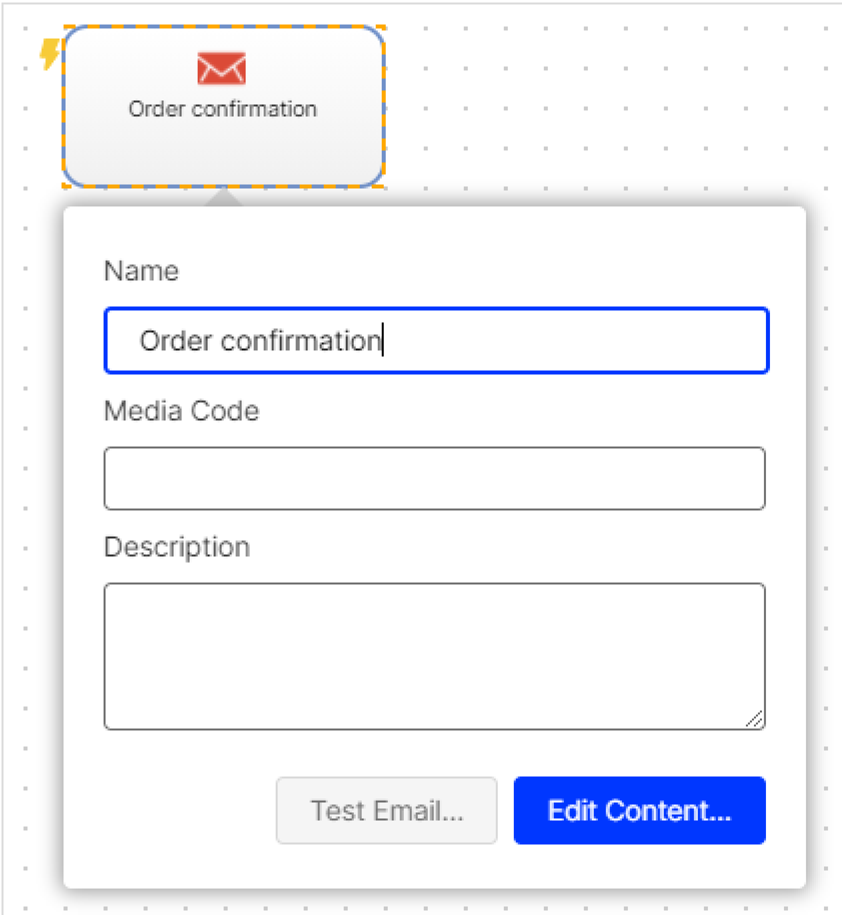
3. Drag the **Recipients** node from the left action area to the workspace area on the right.

4. In the **Recipient lists** drop-down list, select your transaction recipient list.



Note: Customer support sets up a separate transaction recipient list. Be sure you use this transaction recipient list, instead of a regular recipient list. To see if a recipient list is a transactional recipient list, check the column **Transaction API**.

5. From the left action pane, drag an **Email**message node into the workspace.
6. In the **Name** box, assign a concise name to your transactional mail (for example, *Order confirmation*).



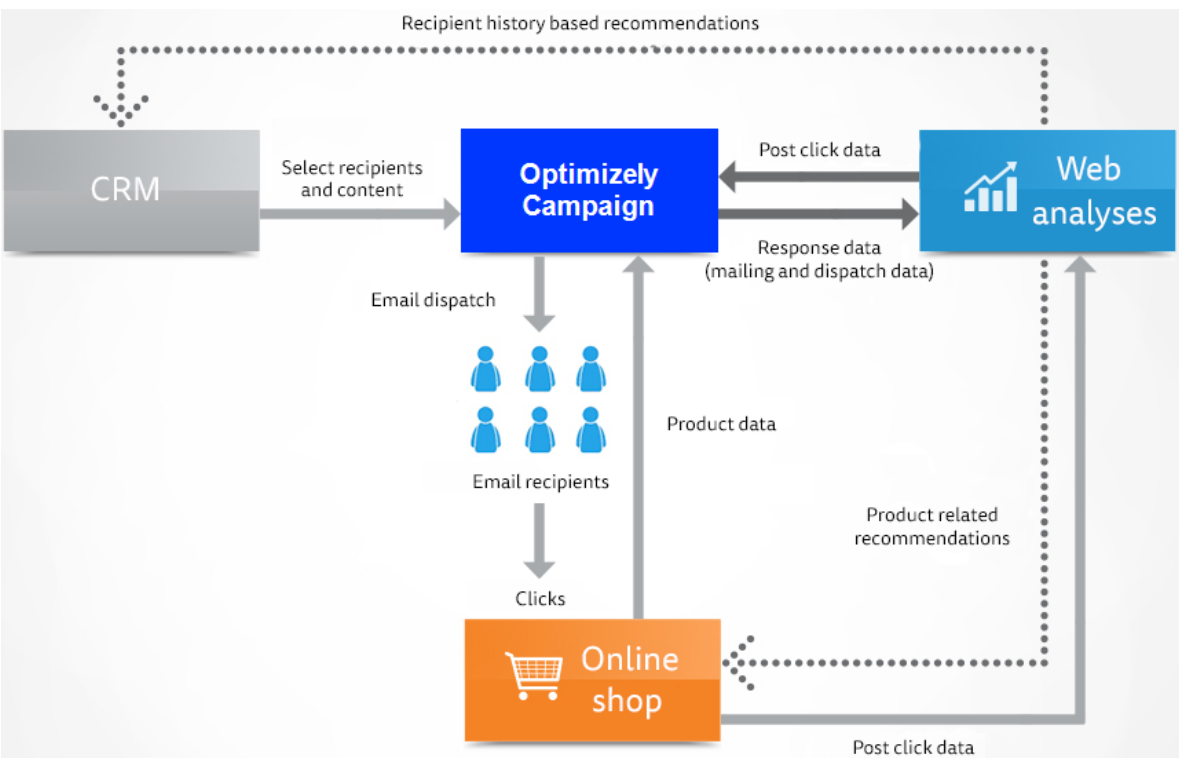
7. In the context menu for the message node, click **Edit Content...**.
8. In the **Template** drop-down list, select the desired template and confirm your selection by clicking **Next**.
9. Configure the template for the transactional mail according to your requirements. Enter a subject and insert the static texts that you want recipients to receive, into the content paragraphs. Insert the relevant field function for the recipient list field of the transaction recipient list into places where variables from Spryker should appear (see the previous example in this topic).
10. Click **Close**.
11. Connect the **Recipient** node with the message node.
12. Click **Save and Close**.
13. To activate your transactional mail and start the sending process, select the mailing in the **Transactional mails** overview and click **Start**.

Configuring transactional mails in Spryker

To set up transactional mails in Spryker, follow the steps on the Spryker documentation website.

Web analytics integrations

This topic gives an overview of web analytics integrations with Optimizely Campaign. Data transfer is usually bi-directional, so that mailing, recipient, and tracking data is available in both Optimizely Campaign and the web analysis software. The raw data Optimizely Campaign receives from the web analysis software is available as post clicks you can use in target groups, campaigns, and reports.



Log in to the client interface of the web analysis software to set up and configure the integration. Customer support sets up the integration for your Optimizely Campaign client.

Web analysis systems

Integrations	econda	etracker	Google Analytics	intelliAd	Webtrekk
Campaign tracking	✓	✓	✓	✓	✓
Purchased products	✓	✓	✗	✗	✓
Viewed products	✓	✓	✗	✗	✓
Abandoned shopping carts	✓	✓	✗	✗	✓
Revenue	✓	✓	✗	✗	✗
Remarketing campaigns*	✓	✓	✗	✗	✓
Recommendations	✓	✗	✗	✗	✗
User-defined segments**	✗	✗	✗	✗	✓
	Setup	**Setup**	**Setup**	**Setup**	**Setup**

Note: * Remarketing campaigns support only bi-directional integrations.

** User-defined segments are configured once at the initial integration setup, and submitted with each data transfer to Optimizely Campaign.

© Optimizely 2022

Data generation

Web analytics software tracks any website visitor action, from entry to the exit point. Actions are aggregated to get click paths, segments or funnels. Additional actions, such as viewed or purchased products and abandoned carts, are enriched with product data (ID, price, category, number of purchased items and so on). Finally, this data is correlated with a recipient in your Optimizely Campaign client. This can be done in two ways:

- **The entry point is a click a link in a mailing**. The email address of the recipient is known and is associated with every action the recipient carries out (Post-click tracking). Until the recipient leaves the website, actions are associated with this email address.
- **The customer logs in or registers with an email address**. Actions are tracked and stored with a temporary ID. If the visitor uses an email address to log in or register, you can associate these actions with the email address retroactively (user event tracking). If the visitor's browser accepts cookies, you can store and associate actions even if the visitor leaves the current session and returns later.

Triggered campaigns

Use web analysis software to trigger automated campaigns where a mailing is sent to a recipient based on criteria matching:

- **Remarketing**. Recipients that viewed a certain product or have put it in the shopping cart receive a mailing with recommendations for similar products. This can be combined with a coupon code for these products.
- **Cross and upselling**. Customers who have ordered a certain product receive an order confirmation with complementary products.
- **Reactivation**. Inactive customers receive an incentive mailing with recommendations according to their customer history. These can be combined with a coupon code valid for a limited time.

Regular campaigns

Integrate a web analysis software into regular mailings to increase relevance for recipients:

© Optimizely 2022

- **Recommendations based on recipient history**. Generate product recommendations that take into account previous purchases, as recipients pay more attention to personalized offerings with products of interest. Mailings with personalized recommendations have a higher conversion rate than other mailings.
- **Recommendations based on products from same price segment**. Analyze the preferred price range for a recipient, and send product recommendations from the same price segment, to increase conversion rate.

Econda Analytics integration

> **Note:** This topic is for administrators and developers with administration access rights in econda.

> **Note:** Available only in Germany, Austria, and Switzerland.

This topic describes the econda Analytics integration with Optimizely Campaign that lets you use product data from econda Analytics in mailing campaigns. With econda Analytics, you can collect visitor activity data that can be used to create fine-tuned segments in Optimizely Campaign. For example, you can specifically address customers with abandoned shopping carts in a remarketing campaign.

Setting up the integration

To access exchanged data, you first need to implement econda Analytics on your website. The econda customer support will configure the Event Data Stream for data export and the import of key mailing data. Optimizely customer support will configure the import of data from the Event Data Stream and the export of the key mailing data. The data from the Event Data Stream is updated hourly and is available for your regular mailings, transactional mails and Marketing Automation.

Data generation

Key mailing data

In the *forward* channel of Optimizely Campaign, key mailing data (KPIs) are automatically transferred to the econda Analytics. You can access the following data at any time in econda Analytics:

- Date of creation
- Mailing ID
- Mailing name
- Mailing description
- Media code (see Processing of analytical data)
- Date of dispatch
- Number of sent emails
- Number of delivered emails
- Openings (only absolute values -not unique- are transferred)
- Clicks (only absolute values -not unique- are transferred)
- Unsubscribes
- Bounces

Using behavior data in Optimizely Campaign

In the *return* channel, the behavior data of newsletter recipients is transferred to Optimizely Campaign, divided into these categories:

- Product purchase
- Product view
- Abandoned shopping cart

You can use this data to create segments in Optimizely Campaign, by creating the corresponding target groups (see below). Use these parameters to create target groups:

- **eventtype**. Category of the event (product:buy, product:view or product:cart:abandonment)

© Optimizely 2022

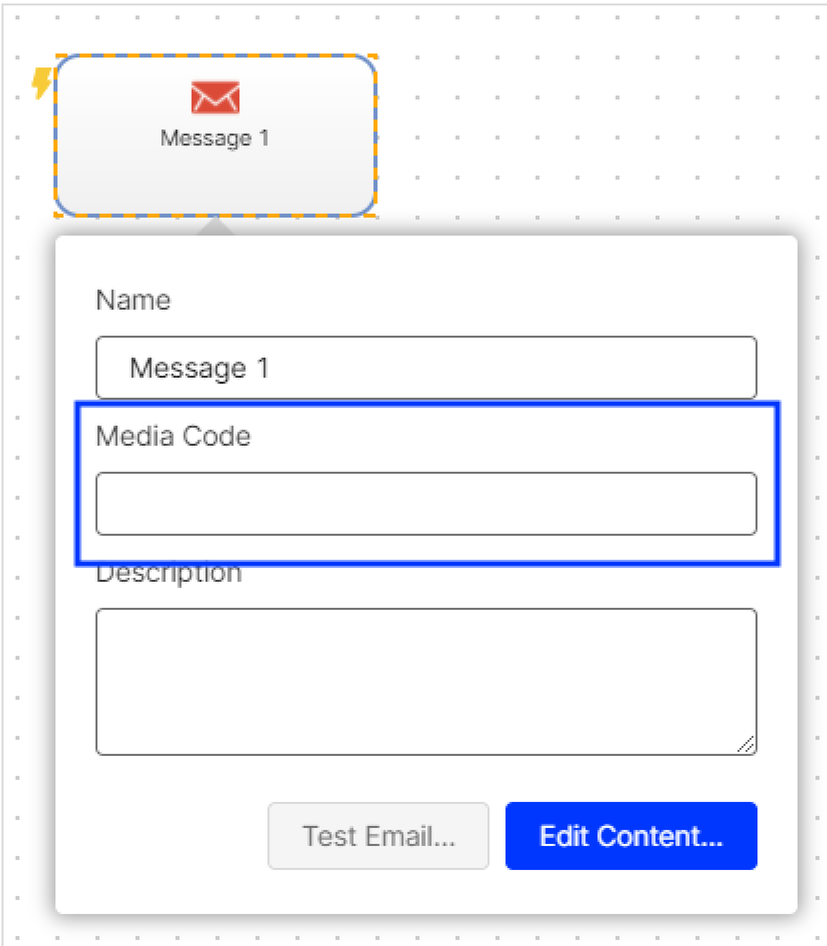
- **product:pid**. Product’s order number
- **product:category**. Product category
- **sid**. Order or process number
- **order:number**. Number of the placed order
- **product:count**. Number of exemplars placed in the shopping cart
- **product:price**. Product price

Identification of the recipients is done using the Recipient ID and the Mailing ID, attached to the links in the newsletter.

Processing analytical data

When creating a mailing, you can specify a media code to the message node, to be used for grouping multiple mailings in econda Analytics. For example, assigning mailings within a multi-stage campaign to the same media code, lets you evaluate these mailings together. No further configuration is necessary.

> **Note:** To track clicks on individual mailing links and analyze these in key indicator funnels in econda, contact customer support. Use the **newsletter** parameter in econda, enter the media code as the value, and save this as default setting.



Creating target groups for use with econda

To use web analytics data, you must first create target groups. Do the following:

1. Open the Optimizely Campaign menu and select **Recipients** > **Target Groups**.
2. Click **Create**.
3. In the **Target group definition** area, click **Add +**.
4. In the second drop-down list, select **Action** and in the third list, **has created one or more post clicks**.
5. If you are using multiple post-click services, select **Web analytics** in the **Service** drop-down list.

6. In the **Mailing** drop-down list, select the mailings to which the data refers. If nothing is selected, all mailings are analyzed.
7. Select a date or time in the **Period** drop-down list to only select post clicks created within a defined time range or at a certain date. Time entered as a number of days ("Exactly 30 days ago") refer to the current day.
8. In the **Category** drop-down list, select **eventtype** then the operator **equals**.
9. Enter the desired category, for example *product:purchase*. Note the spelling to make sure it is identical to the name used by econda. The auto-complete feature assists you in avoiding errors.
10. Click **Apply ✓** . This target group rule will select recipients who have purchased any type of product. To refine the target group to recipients who purchased a specific product, add another rule.
11. In the **Target group definition** area, click **Add +**.
12. In the **Category** drop-down list, select **product:category** then the operator **equals**.
13. Enter the name of the category as a reference value.
14. If required, add more rules to the target group. You can combine the econda web analytics data with other recipient and campaign data, make sure to test the created target group before first use. In the **Analysis** area, select a recipient list and click **Calculate**
15. Click **Apply ✓** .
16. Open **Properties** and enter a name for the target group. Optionally, enter a description.
17. Click **Create**.

Etracker Analytics integration

> **Note:** This topic is for administrators and developers with administration access rights in etracker.

> **Note:** Available only in Germany, Austria, and Switzerland.

This topic describes the etracker Analytics integration with Optimizely Campaign that makes website visitor activity and product data available for email campaigns from the etracker Analytics. The etracker **Remarketing Feed** lets you collect visitor activity data that can be used for creating segments for target groups and in Marketing Automation. You can send remarketing emails, addressing customers with specific product views, purchases, and abandoned shopping carts.

Setting up the integration

Contact etracker support to enable the inbound channel and the Remarketing feed function for your etracker account.

Linking extension and outbound channel

If required, create the corresponding campaign in **etracker Campaign Control** before sending a mailing.

Optimizely Campaign extends mailing links with these parameters:

- **etcc_rid**. RecipientID (unique, coded ID of the recipient)
- **ettc_mid**. MailingID (unique, coded ID of the mailing)
- **etcc_med**. Medium ("email")
- **etcc_par**. Partner ("Optimizely")
- **etcc_cmp**. (name of the mailings)
- **etcc_var**. Media code
- **etcc_date**. Start date of the mailings

To get the exact link in the mailing of etracker, add the parameter **etcc_plc** to selected links in your mailing.

Importing segments from etracker

Based on website visitor activities, etracker generates data sets for every event in the return channel and transfers them to Optimizely Campaign. An event can be a product purchase, a product view or an abandoned shopping cart. To create a segment from these events, define a target group that filters data sets belonging to the same event type, for example "product purchase". You can also add additional parameters, for example data from particular mailings, where applicable.

The following data is transferred hourly:

Name	Data type	Description	Notes
Event	String	One of the following: **abandonment**, **order** or **productView**	Instead of these standard event types, you can define others on the administrator page of your etracker account, for example `productRating` or the like.
context	String	The product ID from your shop system.	
price	Float	The price of the product.	The gross price that is transferred.
Number	Integer	The number of products for each item.	The total price for each item can be calculated from the number of products and the product price.
Order number	String	The order number when the order is initiated. Using the order number, data sets for various products can be allocated to an order if they have coinciding order numbers.	
Session ID	String	If no order is initiated, the session ID helps allocate multiple products to one shopping cart.	

Creating target groups for use with etracker

To use web analytics data, you must first create target groups in Optimizely Campaign. Do the following:

1. Open the Optimizely Campaign menu and select **Recipients** > **Target Groups**.
2. Click **Create**.
3. In the **Target group definition** area, click **Add +**.
4. In the second drop-down list, select **Action** and in the third drop-down list, select **has created post click**.
5. If you are using multiple post-click services, in the **Service** drop-down list, select **Web analytics**.
6. In the **Mailing** drop-down list, select the mailings to which the data refers. If nothing is selected, all mailings are analyzed.
7. Select a date or time in the **Period** drop-down list to only select post clicks created within a defined time range or at a certain date. Time entered as a number of days ("Exactly 30 days ago") refer to the current day.
8. In the **Category** drop-down list, select a value and assign an operator, for example **equals**. Use values from Recipient segments, or one of the values previously defined.
9. Enter a reference value.
10. Click **Apply ✓** .
11. To combine multiple categories, click **Add +** and repeat the steps.
12. In the **Properties** tab, enter a name for the target group.
13. Click **Create**.

Example: Buyers of a certain product select

1. Open the Optimizely Campaign menu and select **Recipient** >**Target Groups**.
2. Click **Create**.
3. In the **Target group definition** area, click **Add +**.
4. In the second drop-down list, select **Action** and in the third drop-down list, select **has created post click**.
5. In the **Service** drop-down list, select **Web analytics**.
6. In the **Category** drop-down list, select **event type** and assign the operator **equals**.
7. Enter the reference value *order*.
8. Click **Add +** and repeat the actions described under 6 and 7. Instead of **event type**, select **context** and in the reference box, enter *XYZ* (the name of your product).
9. Open **Properties** and enter the name *buyer of product XYZ* . Optionally, enter a

description and select a folder for saving the target group.

10. Click **Create**.

Google Analytics integration

> **Note:** This topic is for administrators and developers with administration access rights in Google Analytics.

This topic describes the Google Analytics integration with Optimizely Campaign that allows for the allocation of mailing recipients and website visitors, to use the evaluation capabilities of Google Analytics to measure the results of mailing campaigns. The Google Analytics integration offers a central platform for the evaluation of online campaigns, as click rates recorded by Optimizely Campaign can be evaluated alongside financial success of campaigns.

Setting up the integration

You need a Google Analytics user account to access the Google Analytics interface. To set up the integration in your client, contact customer support. No mailing setting adjustments are needed, all mailing data is automatically transferred to Google Analytics.

Transferring data

The integration uses an automatic, generic link extension which adds parameters used by Google Analytics for the allocation of campaigns to links used in the mailing. Google Analytics uses cookies to identify returning visitors. Recipients who initially accessed the website via an mailing campaign, are identified as mailing campaign visitors also when returning via the website.

Using the link extension, global shipping data is transferred to your Google Analytics account after dispatch of a mailing. You can view and influence the data aggregation analysis in Google Analytics.

These parameters are used for link extension and data transfer:

- utm_source
- utm_medium
- utm_campaign
- utm_term
- utm_content

Use these standard parameters to automatically transfer data, for example:

- Date of creation
- Mailing ID
- Mailing name
- Mailing description
- Mailing type
- Recipient list fields

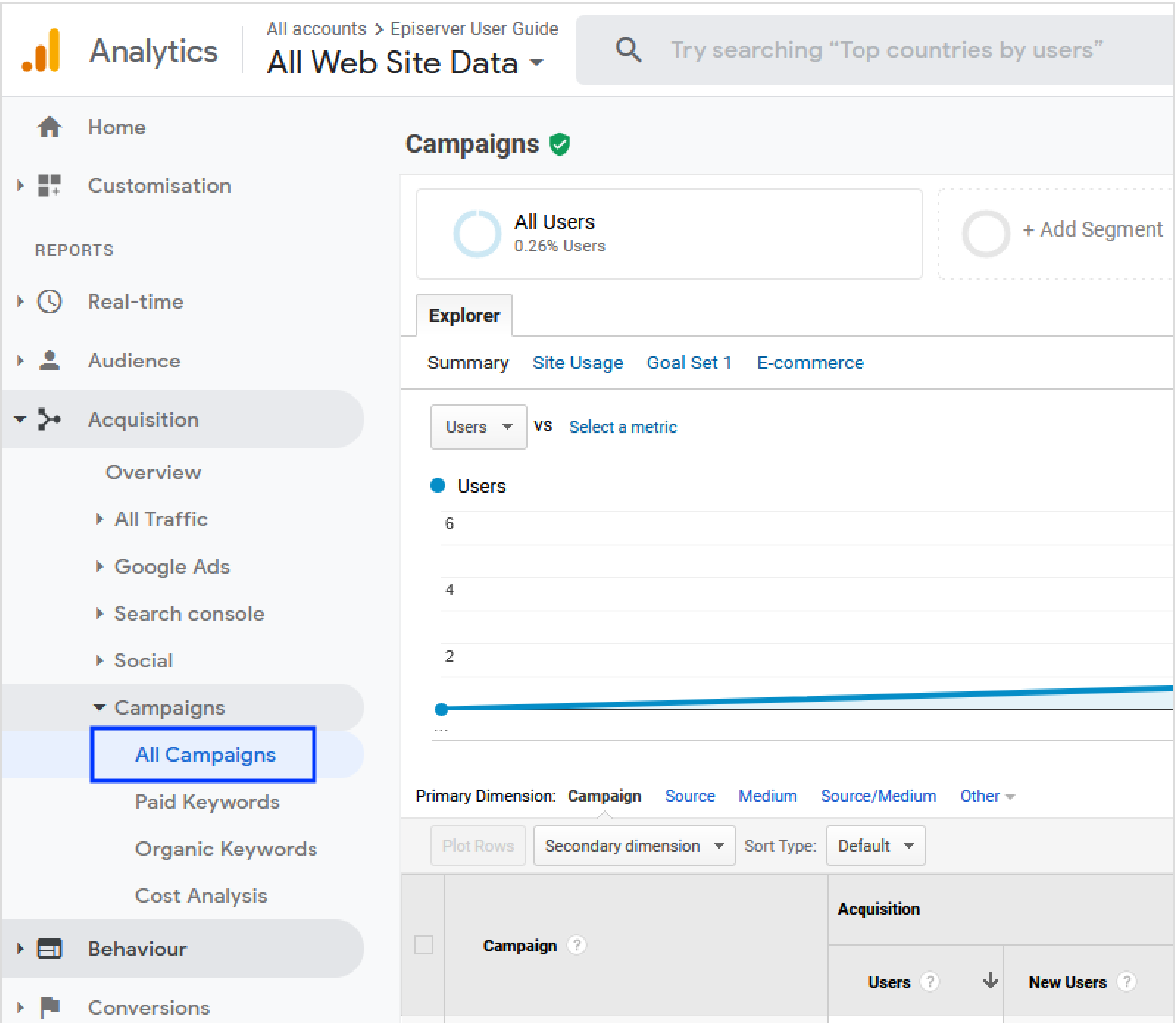
Examples:

- To transfer the mailing type **Newsletter** to Google Analytics, use the **utm_source** parameter.
- To transfer the mailing type, use the **utm_medium** parameter, and for the mailing name, the **utm_campaign** parameter.

You can also combine two data sets and transfer them together using one standard parameter. The mailing name and the corresponding creation date can for example be combined using the **utm_campaign** parameter. For other combinations and more information, contact Optimizely customer support.

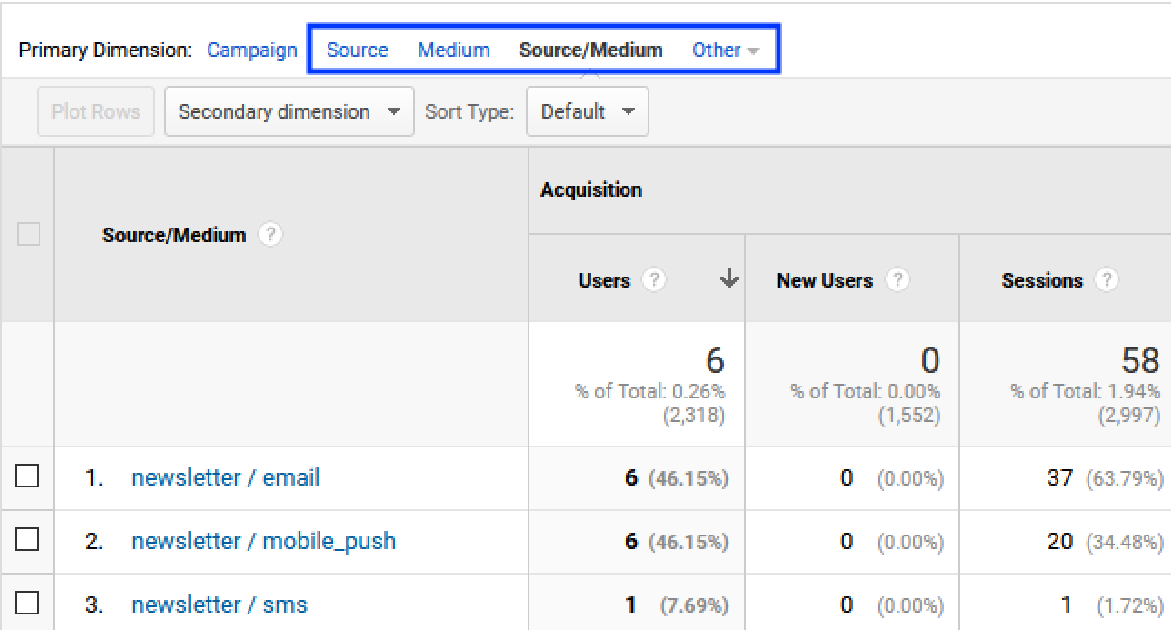
Viewing data in Google Analytics

Open Google Analytics and select **Aquisition** > **Campaigns** > **All Campaigns**.



Under **All Campaigns**, all campaigns are listed by campaign name. Click the campaign title to view available values in order of time. Website hits generated by a mailing are labeled by source and medium.

For a better overview, you can sort the data by source (for example, *newsletter*), medium (for example, *email*), source/medium (for example, *newsletter/email*) or other criteria.



Google Tag Manager integration

> **Note:** This topic is for administrators and developers with administration access rights in Optimizely Campaign.

When using Google Tag Manager (GTM) to implement tracking codes and conversion pixels on your website, you can connect it with post-click tracking. This lets you set up a data transfer to Optimizely Campaign to collect data of recipients who have been sent from a mailing to your website by clicking a link. You can use this data to segment recipients according to actions on your website and create precisely tailored target groups.

To transfer the action data to Optimizely Campaign, you have to configure a cookie and the data transfer in Google Tag Manager.

To start the data transfer, finally publish the changes in the Google Tag Manager workspace.

Prerequisites

- Implement Google Tag Manager on your website. See Enhanced Ecommerce (UA) Developer Guide.
- Set up post-click tracking. Let customer support know that you want to use post-click tracking with Google Tag Manager.
- Create tracking pixels with and without cookie. If no cookie is created or tracking is disabled, the tracking pixel without cookie (user event tracking) is used.

> **Note:** To access the data in the data layer, see the configuration steps and notes in the Enhanced Ecommerce (UA) Developer Guide.

Configuring the cookie

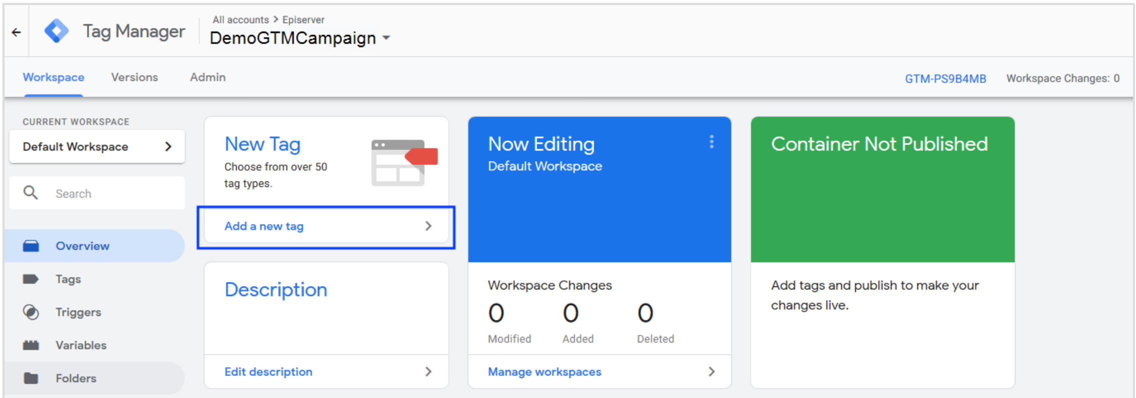
To configure the cookie, create a tag in Google Tag Manager as well as associated triggers and variables.

Creating a tag

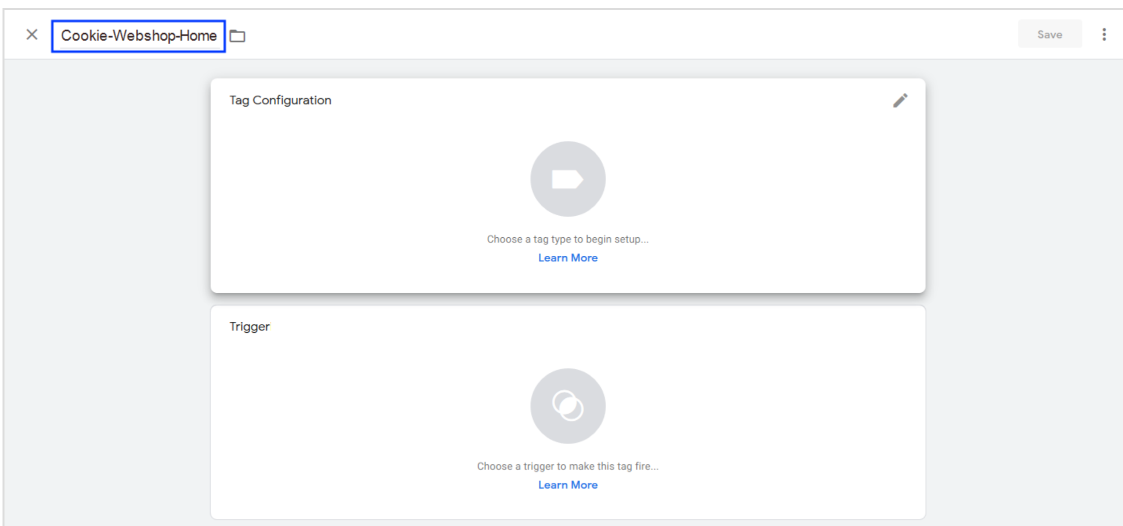
A cookie is required to store action data on your website and transfer it to Optimizely Campaign. In Google Tag Manager, you use a tag to create the cookie and embed it on your website. Do the following:

1. Sign in to Google Tag Manager.
2. Select the container in which you want to configure the cookie.

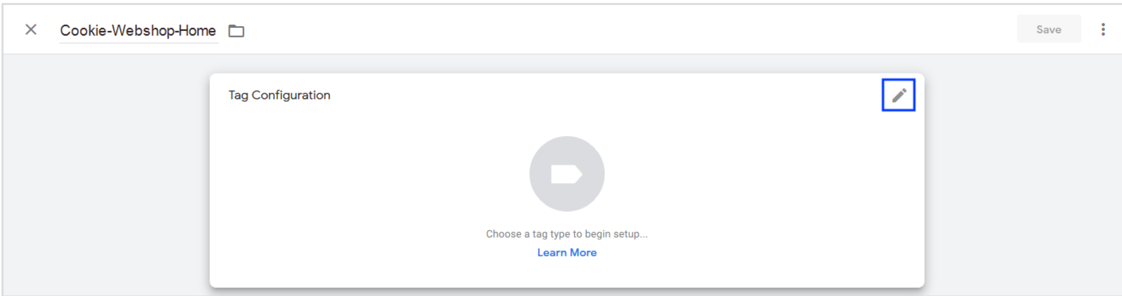
3. Click **Add a new tag**.



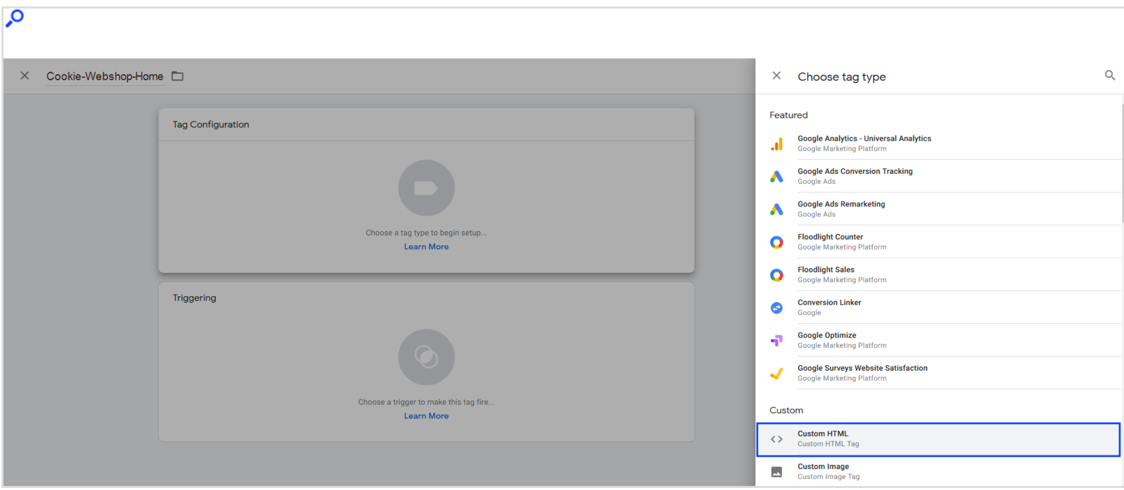
4. Enter a name for the tag, for example *Cookie-Webshop-Home*.



5. In the **Tag Configuration** area, click **Edit** .



6. Select the **Custom HTML** tag type.



7. Enter the following script into the input field:

> **Tip:** The following script represents an exemplary implementation. For example, you can extend the cookie to include and store the UID (unique identifier).

```
<script>
  var cookieName = "o4oclClientId"; // Gives the cookie a name. Replace
"ClientId" with your client ID.
  var cookieValue = "true"; // Assigns a value to the cookie.
  var expirationTime = 2592000; // Defines the expiration time of the
cookie (30 days).
```

```
// Converts the expiration time into milliseconds.
  expirationTime = expirationTime * 1000;
  var date = new Date();
  var dateTimeNow = date.getTime();

// Sets the expiration time (current time + one month).
  date.setTime(dateTimeNow + expirationTime);

// Converts the milliseconds into a UTC time string.
  var date = date.toUTCString();

// Sets the cookie for all subdomains.
  document.cookie = cookieName+"="+cookieValue+"; expires="+date+"; path=/;
domain=."+location.hostname.replace(/^www\./i, "");
</script>
```

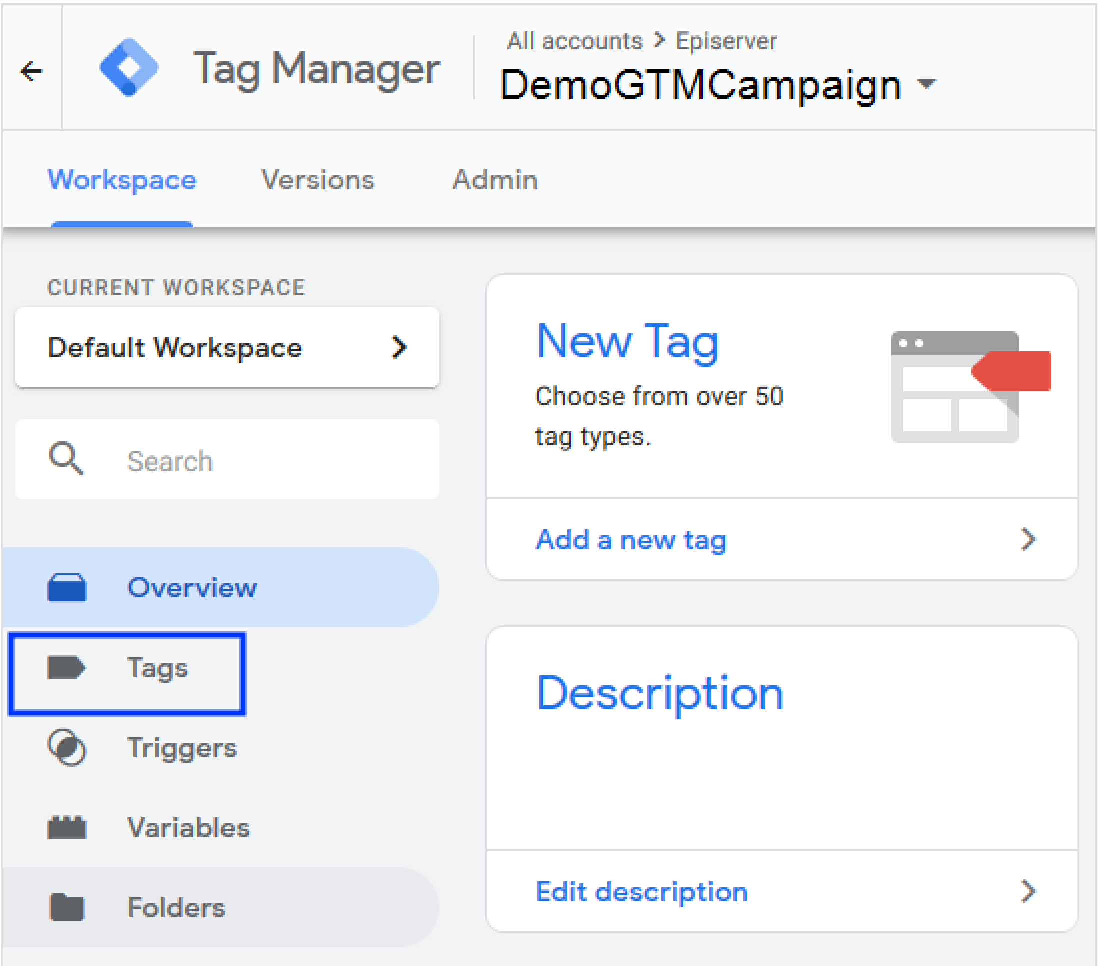
8. Click **Save**.

Creating a trigger

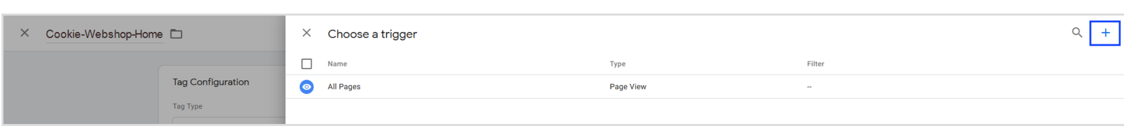
Define when the tag is triggered. You can configure individual triggers, for example for the actions *opened detailed view of a product*, *added a product to the shopping cart*, *removed a product from the shopping cart*, *bought a product*. Do the following:

> **Note:** At least one trigger must be assigned to each tag to be triggered.

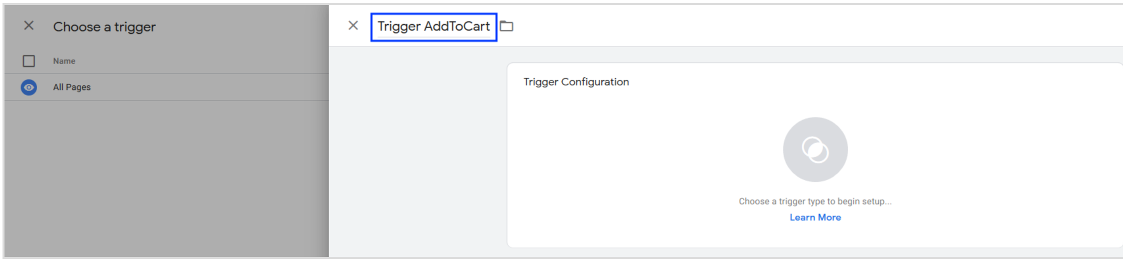
1. In the left menu bar, click **Tags**.



2. Select the created cookie tag.
3. In the **Trigger** area, click **Edit** .
4. To add a new trigger, click **Add** .



5. Enter a name for the trigger, for example *Trigger AddToCart*.



6. In the **Trigger Configuration** area, click **Edit** .
7. Select a trigger type, for example *Custom event trigger*.

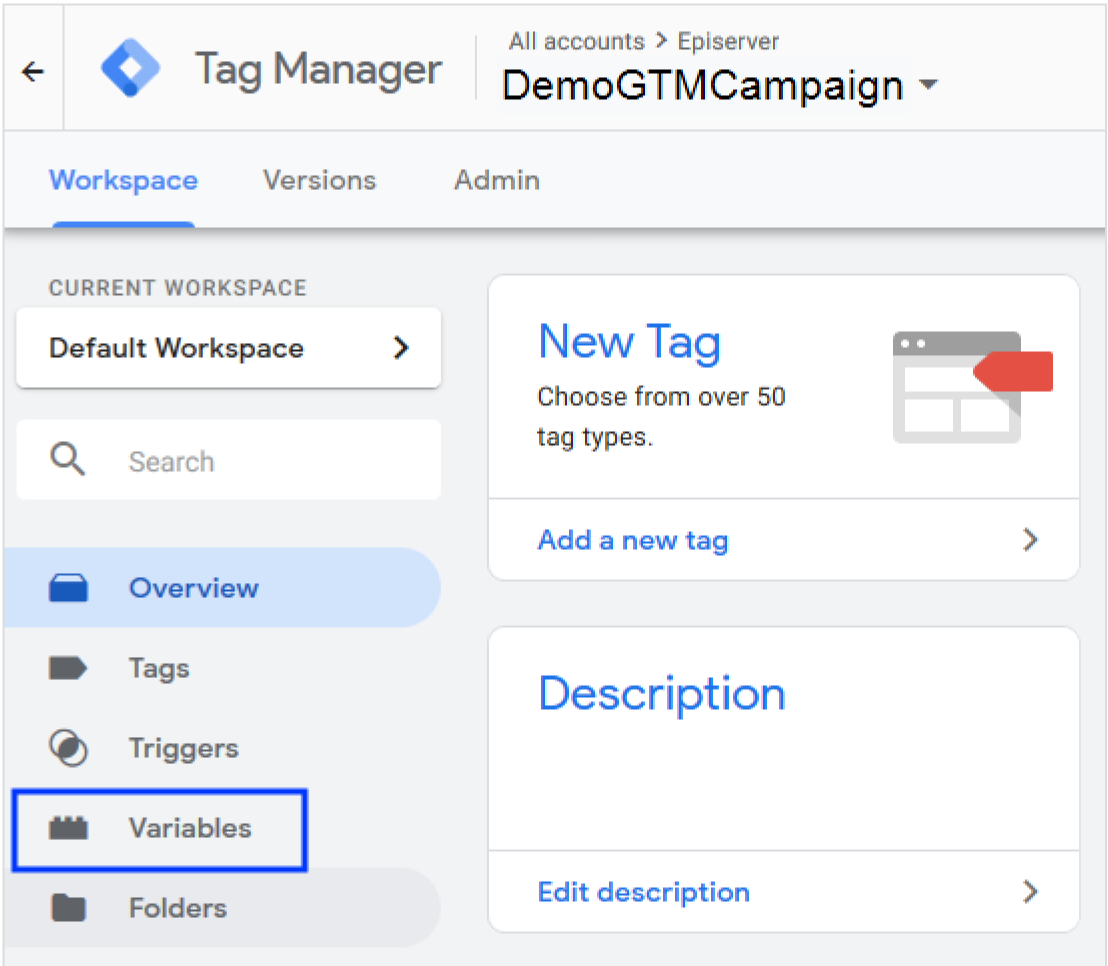
> **Tip:** For information about the different trigger types, see www.support.google.com.

8. Click **Save**.
9. In the tag's window, click **Save**.

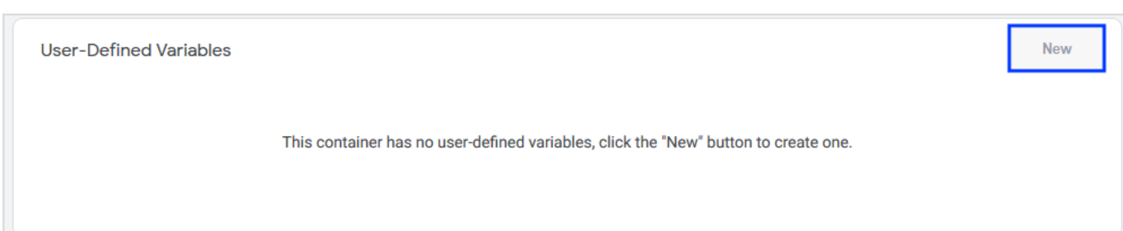
Creating a variable

To implement the cookie, you have to create a user-defined variable that references Optimizely Campaign. Do the following:

1. In the left menu bar, click **Variables**.

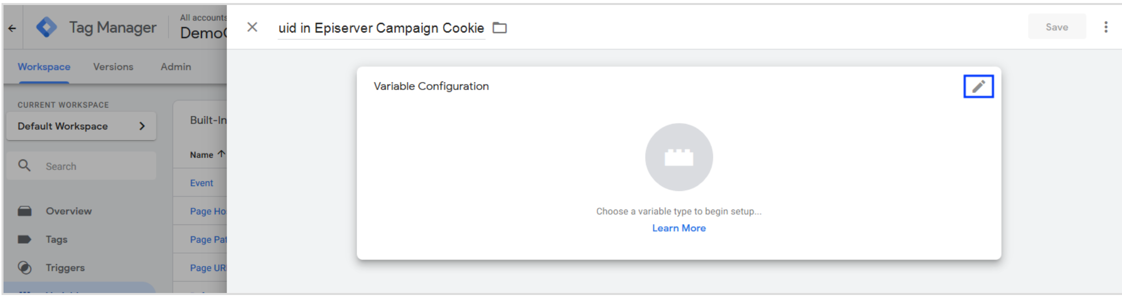


2. In the **User-Definded Variables** area, click **New**.

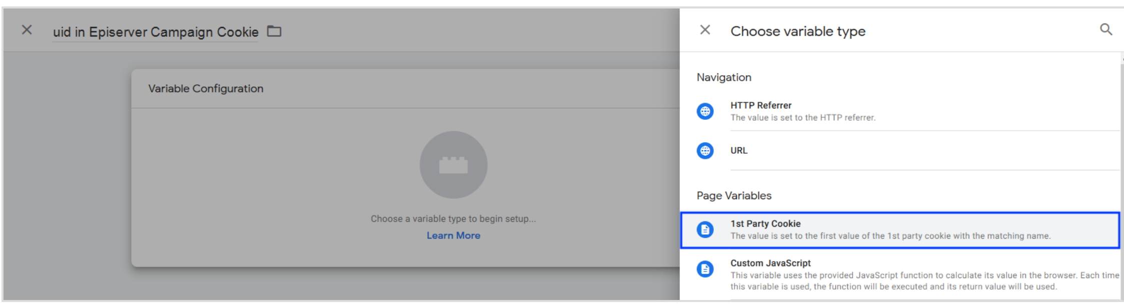


3. Enter *uid in Episerver Campaign Cookie* as name for the variable.

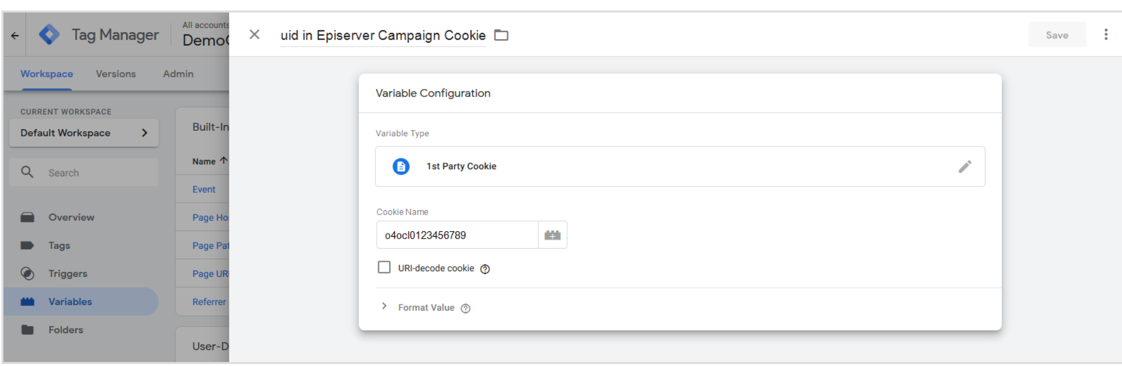
4. Click **Edit** .



5. Click **1st Party Cookie**.



6. Enter *o4oclClient-ID* in the **Cookie Name** field. Replace *Client-ID* with your client ID, for example *o4ocl0123456789*.



7. Click **Save**.

Configuring the data transfer

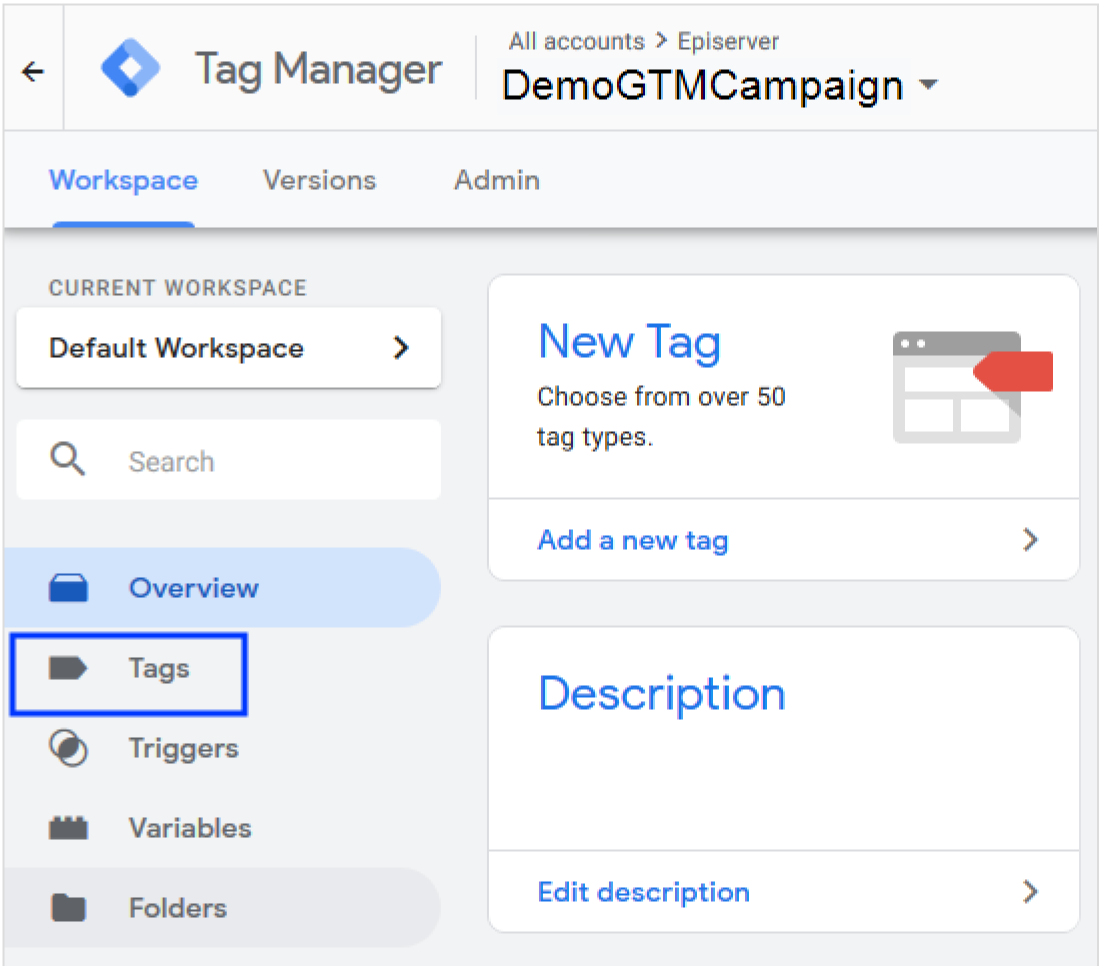
To configure the data transfer, create a tag in the Google Tag Manager as well as associated triggers and variables.

Creating a tag

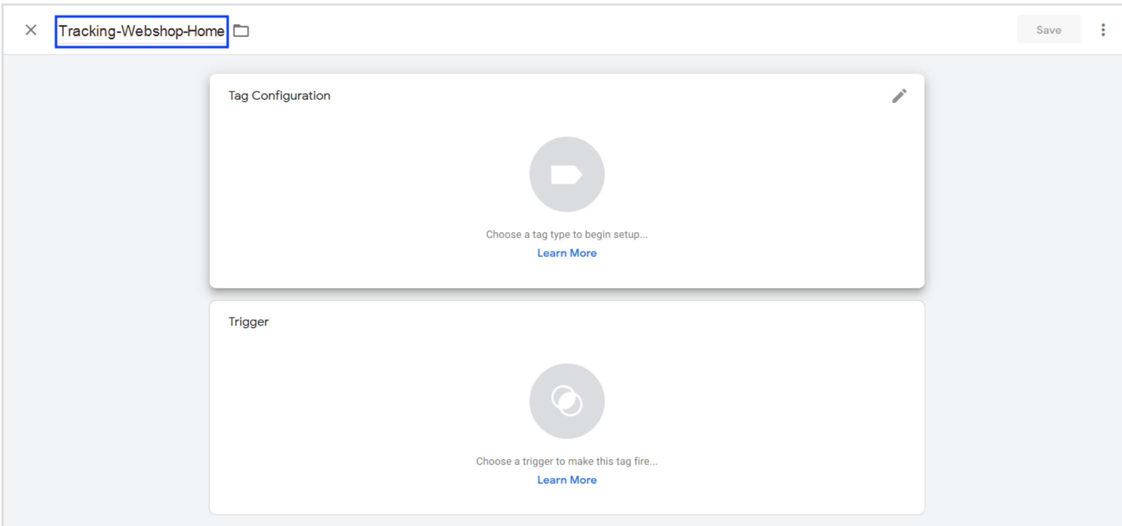
To transfer the action data from your website to Optimizely as post-click data, you have to create a tag. The tag accesses the collected data of the previously created cookie. Do the following:

© Optimizely 2022

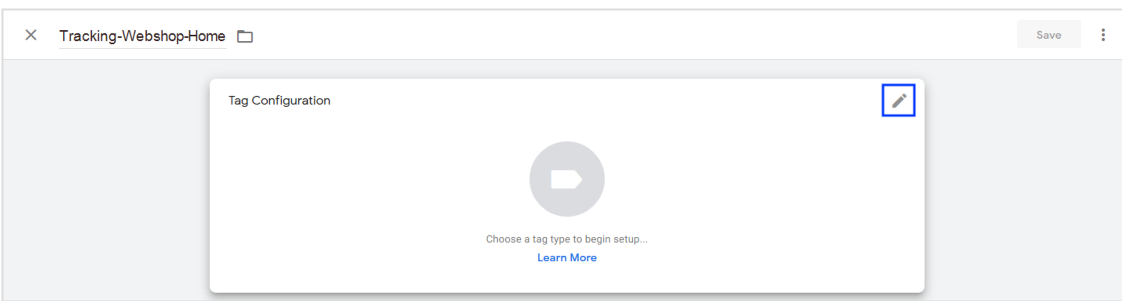
1. In the left menu bar, click **Tags**.



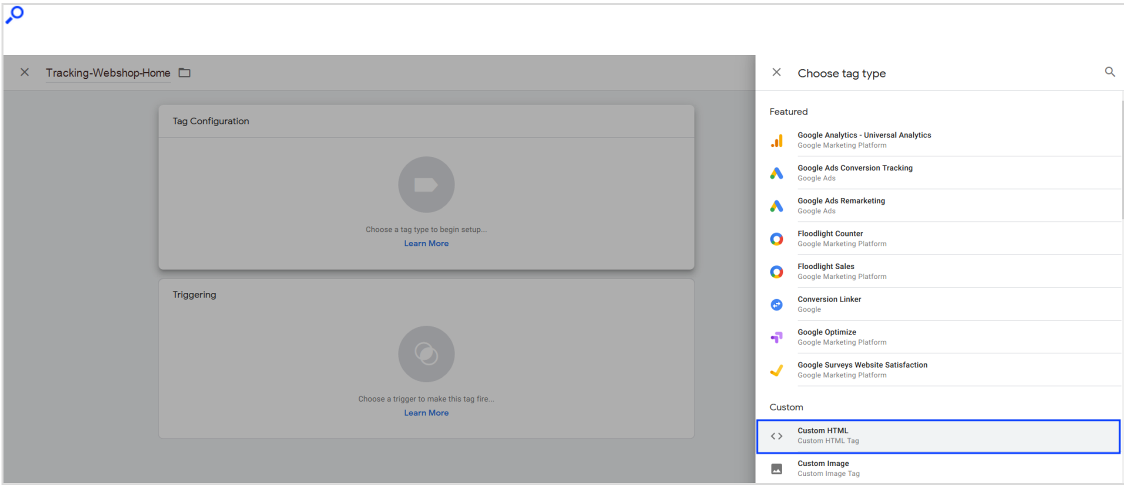
2. Enter a name for the tag, for example *Tracking-Webshop-Home*.



3. In the **Tag Configuration** area, click **Edit** .



4. Select the **Custom HTML** tag type.



5. Enter the following script into the input field:

> **Tip:** The following script represents an exemplary implementation. Depending on how you collect and store customer data, the implementation may differ.

```
</script>
  var campaignCookie = {{uid in Episerver Campaign Cookie}}; // Variable
that stores the cookie name.
  var uid = {{uid}}; // Variable for identifying the user via shop login,
GTM data layer and so on
  var products = {{ecommerce add products}}; // Variable for the inform-
ation of the GTM data layer.

  var standardBasicUrl = "https://domain.tld/pc?mg=ClientID"; // Tracking
URL including the client ID. Replace "ClientId" with your client ID.
  var userEventBasicUrl = "https://-
domain.tld/pc?type=userEvent&authToken=XXX-YYY-ZZZ"; // Tracking URL includ-
ing authentication token.
  var service = "serviceName_ClientId"; // Post-click tracking service used
in Optimizely Campaign. Replace "ClientId" with your client ID.

// Queries whether a cookie is set on the website. If not, user event track-
ing is used.
  if (typeof campaignCookie !== "undefined") {
    var basicUrl = standardBasicUrl
      + "&bi=0"
      + "&service=" + service;
```

```
  } else if (typeof uid !== "undefined") {
    var basicUrl = userEventBasicUrl
      + "&bi=0"
      + "&recipientId=" + uid
      + "&service=" + service;
  }

// Extracts the data in the GTM data layer and merges them into a URL.
  if (typeof basicUrl !== "undefined" && typeof products !== "undefined") {
    for (var i = 0; i < products.length; i++) {
      var product = products[i];
      if (typeof product !== "undefined") {
        var url = basicUrl
          + "&fvalue1="+ product.price
          + "&fvalue2="+ product.quantity
          + "&gvalue1="+ product.name
          + "&gvalue2="+ product.id
          + "&gvalue3="+ product.brand
          + "&gvalue4="+ product.category
          + "&gvalue5="+ product.variant
          + "&gvalue10="+ Date.now();

        var scriptElement = document.createElement("script");
            scriptElement.src = url;
            document.body.appendChild(scriptElement);
      }
    }
  }
</script>
```

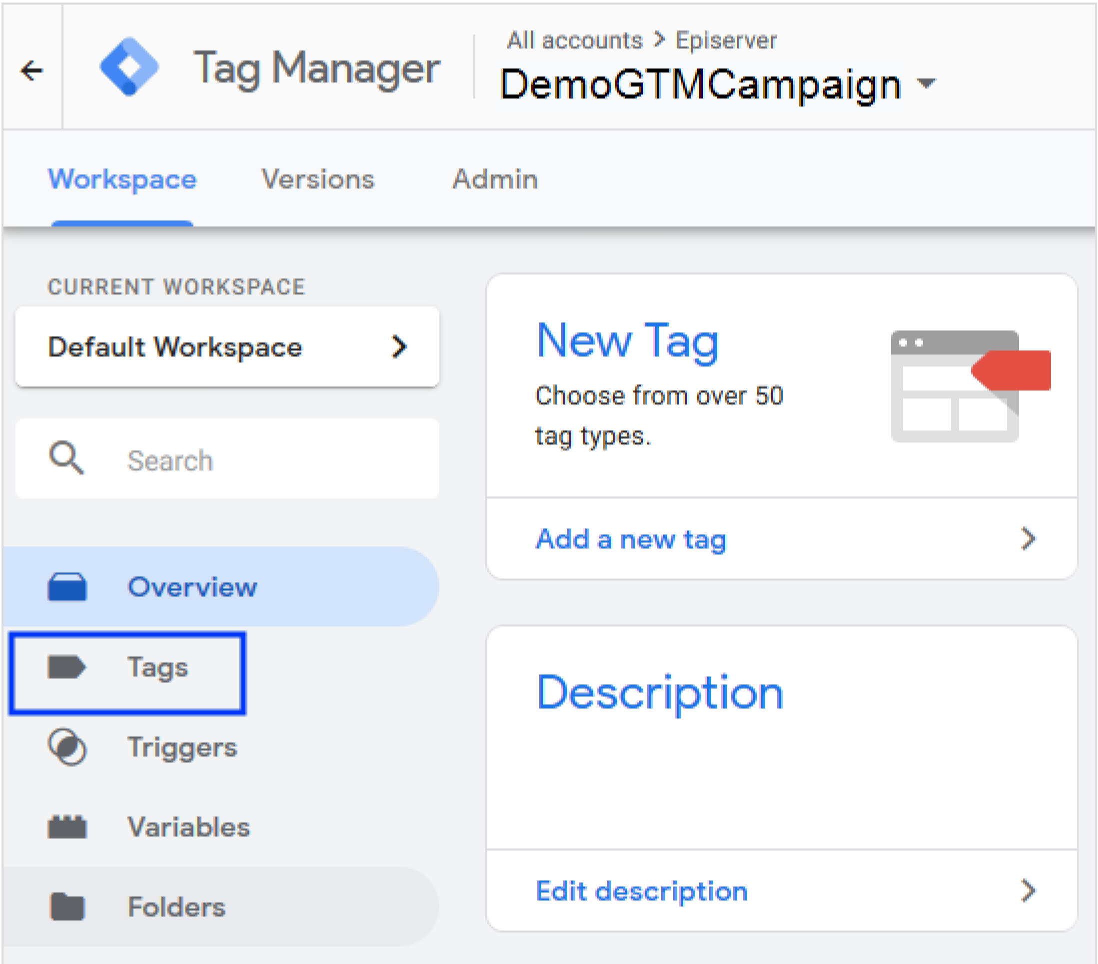
6. Click **Save**.

Creating a trigger

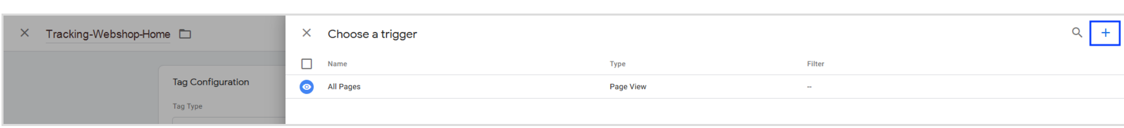
Define when the tag is triggered. You can configure individual triggers, for example for the actions *opened detailed view of a product*, *added a product to the shopping cart*, *removed a product from the shopping cart*, *bought a product*. Do the following:

> **Note:** At least one trigger must be assigned to each tag to be triggered.

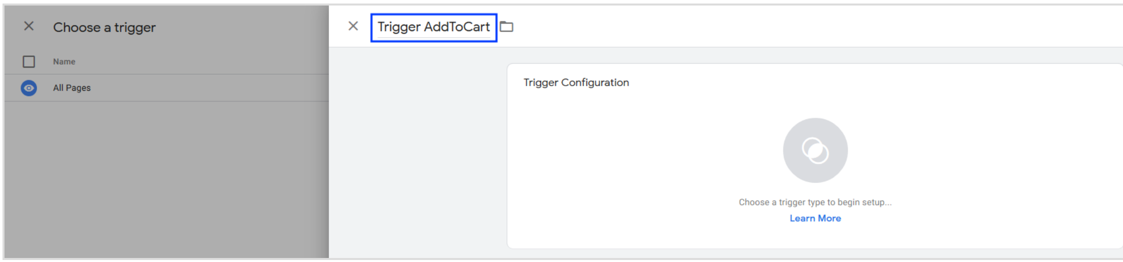
1. In the left menu bar, click **Tags**.



2. Select the created cookie tag.
3. In the **Trigger** area, click **Edit** .
4. To add a new trigger, click **Add** .



5. Enter a name for the trigger, for example *Trigger AddToCart*.



6. In the **Trigger Configuration** area, click **Edit**  .
7. Select a trigger type, for example *Custom event trigger*.

> **Tip:** For information about the different trigger types, see www.support.google.com.

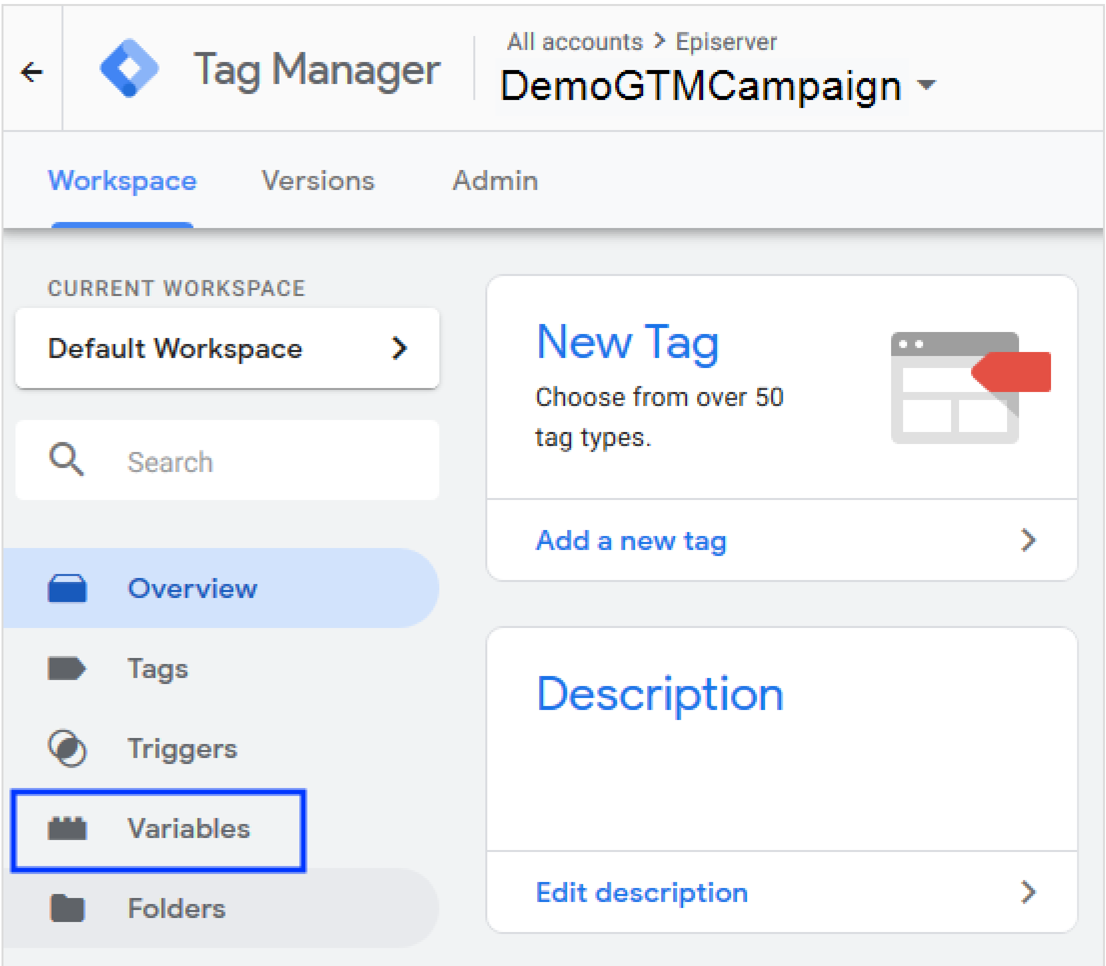
8. Click **Save**.
9. In the tag's window, click **Save**.

Creating variables

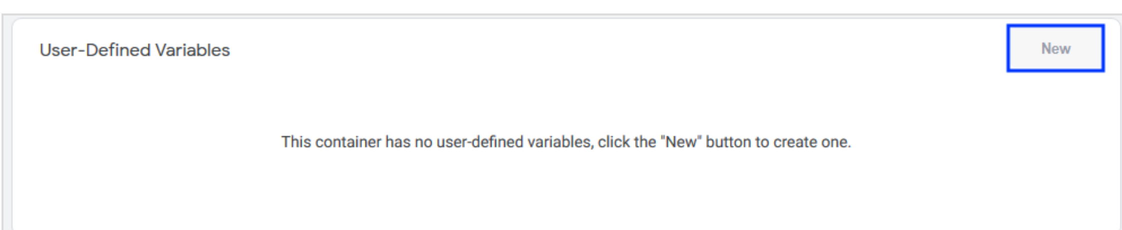
To transfer data to Optimizely Campaign, you have to create user-defined variables for the data in the GTM data layer and for user identification from other sources (shop login, and so on).

GTM data layer

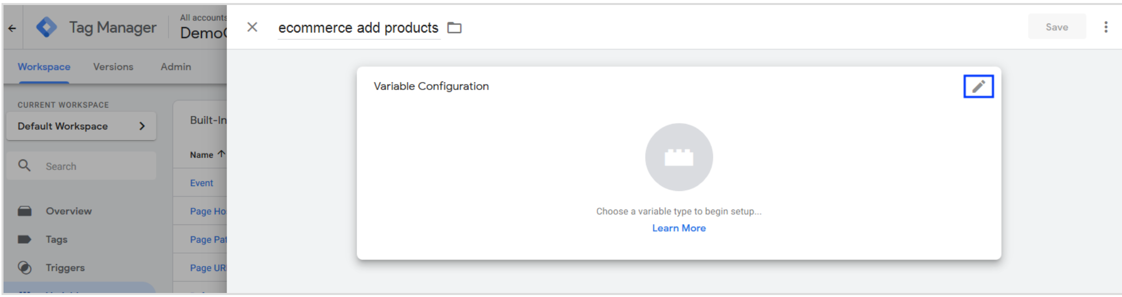
1. In the left menu bar, click **Variables**.



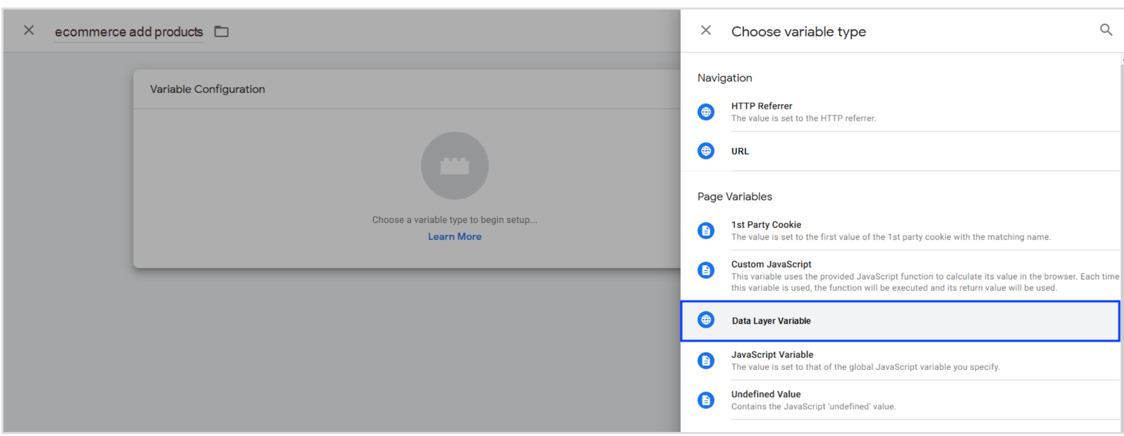
2. In the **User-Definded Variables** area, click **New**.



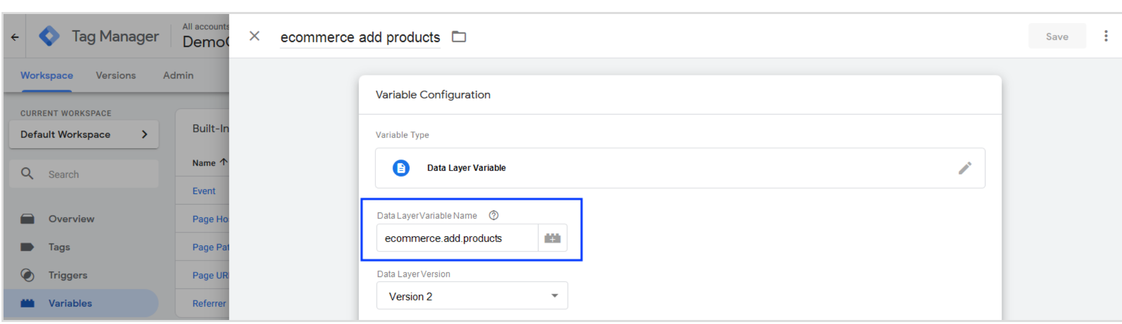
3. Enter *ecommerce add products* as name for the variable.
4. Click **Edit** .



5. Click **Data Layer Variable**.



6. In the **Data Layer Variable Name** field, enter the name that refers to the GTM data layer, for example *ecommerce.add.products*.



7. Click **Save**.

Setting up the data layer on your website

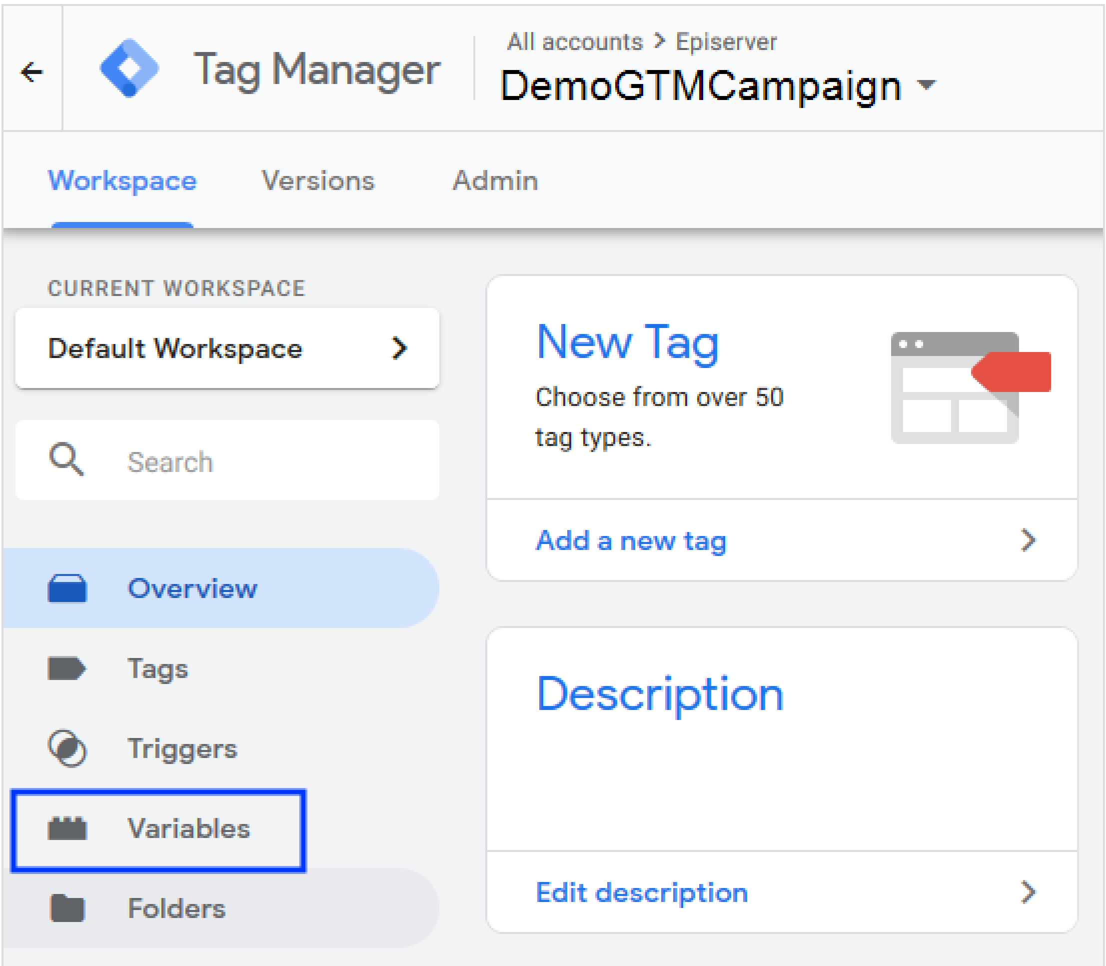
To enable the variables to receive data and transmit it to Epi, your website requires a data layer. See the Enhanced Ecommerce (UA) Developer Guide.

The following script shows an example integration of a data layer for collecting user data when products are added to the shopping cart. Insert the script before the GTM code in the HTML header of your website.

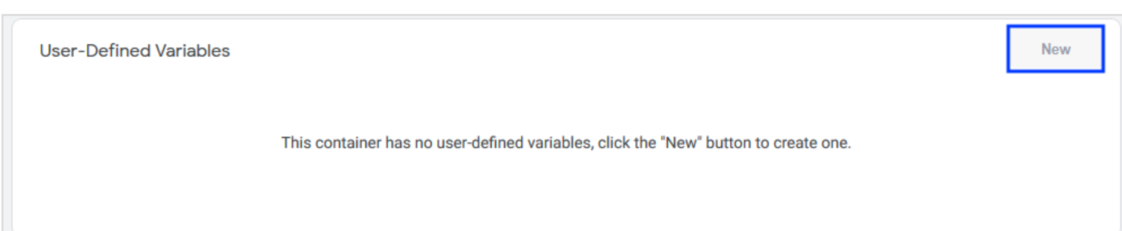
```
</script>
window.dataLayer = window.dataLayer || []; // Creates the data layer object.

dataLayer.push({
  'event': 'addToCart',
  'ecommerce': {
    'currencyCode': 'EUR',
    'add': {
      'products': [{
        'name': 'ProductName',
        'id': '12345',
        'price': '29.99',
        'brand': 'BrandName',
        'category': 'Category',
        'variant': 'Color',
        'quantity': 1
      }]
    }
  }
});
</script>
```

User idetification

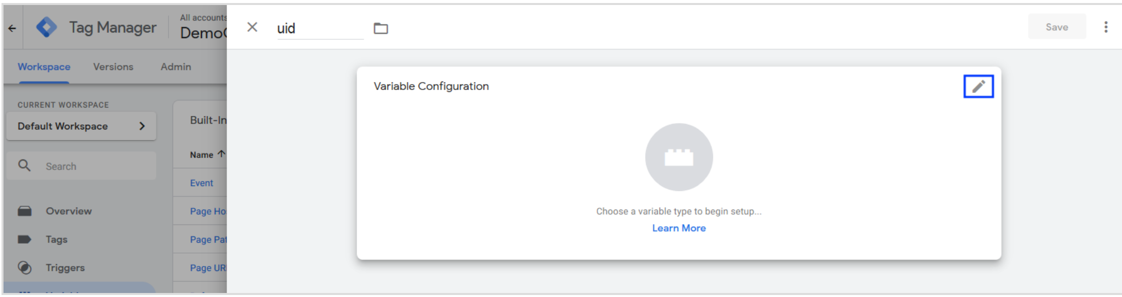
1. In the left menu bar, click **Variables**.



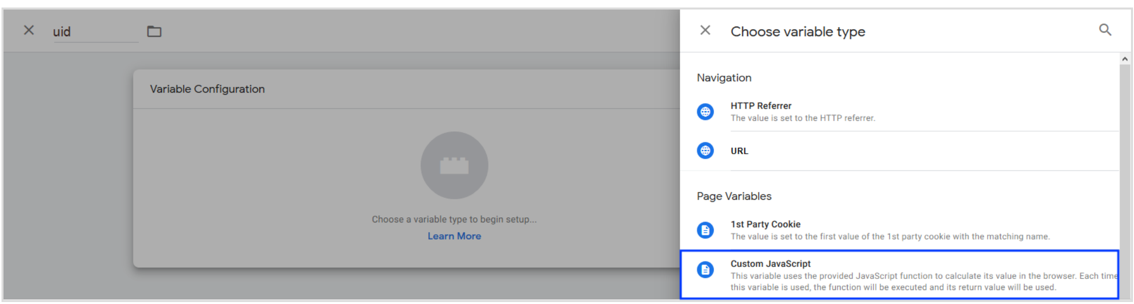
2. In the **User-Definded Variables** area, click **New**.



3. Enter *uid* as name for the variable.
4. Click **Edit** .



5. Click **Custom JavaScript**.



6. Enter the following JavaScript code into the input field:

```
function() {
  var uid = new URLSearchParams(window.location.search).get('uid');
  if (uid) {
    return uid;
  } else{
    return;
  }
}
```

7. Click **Save**.

IntelliAd integration

> **Note:** This topic is for administrators and developers with administration access rights in intelliAd.

This topic describes the intelliAd integration with Optimizely Campaign that lets you evaluate and optimize email campaigns together with other online channels. In addition to the email channel, intelliAd can analyze search engine marketing, affiliate marketing and price search engines. Clicks from newsletters are tracked and assigned to an email channel, and displayed in the campaign overview.

The integration uses link masking to redirect links in a tracked mailing via the intelliAd server. The masked links are automatically generated and include multiple parameters enabling them to be assigned to a specific client. You generate an ID string in intelliAd and enter it in the **intelliAd** tab when creating the mailing. When clicking a masked link, the recipient will first be redirected to the intelliAd tracking server (without noticing). The tracking server analyzes the parameters included in the extension and saves them in the database. The recipient is then redirected to the actual target page.

Setting up the integration

You need an intelliAd account but the integration does not require any direct data exchange between Optimizely Campaign and intelliAd. In Optimizely Campaign, intelliAd is integrated into the mailing creation process.

Extending links

These parameters are added to each mailing link:

- **intelliAdcustomerId**. Identifies the intelliAd customer.
- **marktId**. Identifies Optimizely Campaign as the source of the link.
- **channelId**. Identifies the marketing channel, usually **email** or **newsletter**, for mailing links.
- **campaignId**. Identifies a campaign in intelliAd. Multiple channels can be combined into a single campaign.

  > **Note:** This ID does not belong to a Marketing Automation campaign in Optimizely Campaign.

- **adGroupId**. Identifies an **AdGroup**.
- **subId**. Generated from the mailing ID and the subject of the mailing.

Configuring mailings

When creating a mailing, enter the ID string in the **intelliAd** tab in your intelliAd account. The ID string consists of six blocks of numbers using this format:

```
93539353332363231313O3-100-43637353132363231313O3-101-101-101
```

Each block of numbers encodes one of the link parameters specified above with the exception of the **subId** parameter, which is generated from Optimizely Campaign. The intelliAd tracking is activated when an ID string is saved for a mailing. Links in the mailing are created when the email is delivered, using this format :

```
http://t23.intelliad.de/index.php
   ?redirect=http://www.beispiel.de/shop/products/raincoat-blue
   &cl=12345
   &bm=100
   &bmcl=123
   &cp=111
   &ag=222
   &subid=12345|FirstNewsletter|ProductLink
```

> **Note:** The **redirect** parameter includes the original URL and is URL-encoded. In this example, breaks are added and encoding is omitted for readability reasons.

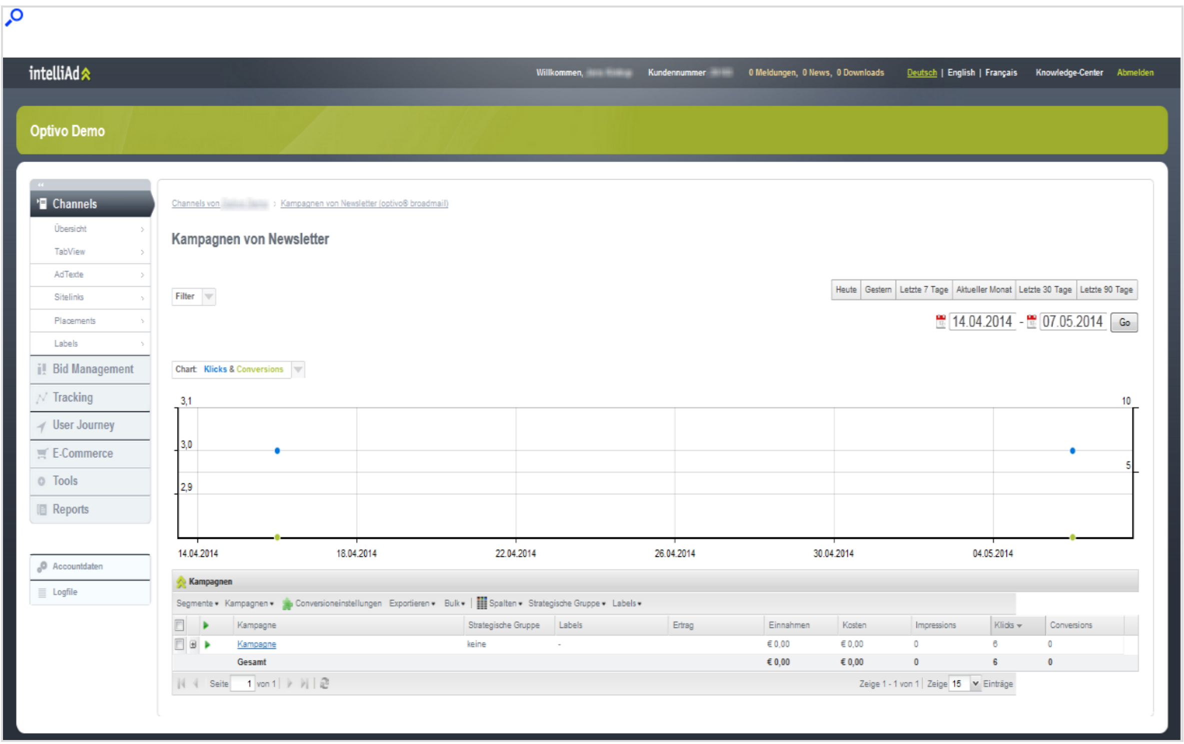
Links without tracking

By default, the following links are **not** tracked via intelliAd.

- Link to the online version
- Unsubscribe link
- double opt-in link
- Links to landing pages
- SWYN links

Analyzing intelliAd performance

Sign in to intelliAd and select the channel **optivo broadmail** in the dashboard. The timeline displays clicks in the selected channel, and you can filter results according to the criteria you defined.



Webtrekk integration

> **Note:** This topic is for administrators and developers with administration access rights in Webtrekk.

> **Note:** Available only in Germany, Austria, and Switzerland.

This topic describes the Webtrekk integration with Optimizely Campaign that makes website visitor action and product data from Webtrekk Q3 available in for designing remarketing campaigns, and adding personalized recommendations or a coupon code to mailings. The integration allows bi-directional exchange of mailing statistics, dispatch and action data.

Setting up the integration

You need a Webtrekk account and the website to be tracked must be configured accordingly. See the Webtrekk documentation or contact the Webtrekk customer support to set up the site tracking. The setup of the data interface integration with Optimizely Campaign is done by Optimizely customer support. When completed, web analytics data is automatically imported into Optimizely Campaign.

Data generation

Key mailing data

The *outbound* channel from Optimizely Campaign to Webtrekk transmits the key mailing data (KPI), triggered automatically after a mailing is dispatched. The data is updated daily.

The following data is available in Webtrekk:

- Creation date
- Mailing-ID
- Mailing name
- Mailing description
- Media code
- Number of sent emails
- Unsubscribes
- Opens (only absolute values -not unique- are transferred)
- Clicks (only absolute values -not unique- are transferred)
- Soft bounces
- Hard bounces

Recipient segments

The *inbound* channel transmits segments based on activities of website visitors to Optimizely Campaign. Each segment contains events (data sets) identical in reference to a defined criterion, for example a product purchase.

The following segments are defined by the integration:

- **orders**. Product purchases.
- **productViews**. Product views.
- **abandonments**. Abandoned shopping cart items.

Each data set contains additional parameters, that can be used to refine target groups in Optimizely Campaign:

- **Mailing-ID**. ID of the mailing from which the action is initiated.
- **Recipient-ID**. ID of the recipient carrying out an action.
- **Mailing-To-User-ID**. Unique ID which combines mailing and recipient IDs.
- **Datum**. A random date, formatted internationally. Actions are stored by the hour.
- **Context**. Product designation or additional context data.

Data security

Personal data security is guaranteed for both output and return channels. Mailing links are expanded with anonymized recipient and campaign data. This prevents parameters from being associated with a recipient, either directly or by fraud via third parties. The return channel re-associates the anonymized data with the mailing recipients and campaigns.

Configuring data exchange

Optimizely customer support configures the key mailing data that you can import into Webtrekk, as well as import of segments generated by Webtrekk. Contact Webtrekk customer support to configure your Webtrekk account.

Creating target groups in Optimizely Campaign

Do the following to create a target group from recipient segments generated by Webtrekk.

1. Open the Optimizely Campaign menu and select **Recipients** > **Target Groups**.
2. Click **Create**.
3. Enter a name for the target group and click **Add +** in the **Target group definition** area.
4. In the second drop-down list, select **Action** and in the third drop-down list, select **has created post click**.
5. If you are using multiple post-click services, select **web analytics** in the **Service** drop-down list.
6. In the **Mailing** drop-down list, select the desired mailings. If nothing is selected, all mailings are analyzed.
7. Select a date or time in the **Period** drop-down list to only select post clicks created within a defined time range or at a certain date. Time entered as a number of days ("Exactly 30 days ago") refer to the current day.
8. In the **Segment** drop-down list, select product purchases (**orders**), product views (**productViews**), or abandonments (**abandonments**) to filter.
9. Optionally, in the **Context** box, enter a product ID to only filter recipients that viewed, bought or placed a certain product in the cart. If nothing is specified, products will be considered.
10. Click **Apply ✓** .
11. To combine multiple categories, click **Add +** and repeat previous steps.
12. Open **Properties**, enter a name for the target group. Optionally, enter a description.
13. Click **Create**.

Example: Creation of the target group Transaction aborted

To define a target group capturing aborted shopping cart transactions during the first quarter of 2022, do the following in the **Create target group** window:

1. Create a new target group and in the **Target group definition** area, click **Add +**.
2. In the second drop-down list, select **Action** and in the third drop-down list, select **has created post click**.
3. In the **Period** drop-down list, select **from... to...** and use the calendar to select the period from 1 January 2022 to 31 March 2022.
4. In the **Segment** drop-down list, select **Abandonments**.
5. Click **Apply ✓** .

6. Open **Properties** and enter *Abandonments* in the **Name** field.
7. Click **Create**.

CRM integrations

The Optimizely Campaign CRM integrations lets you manage campaigns and select leads and contacts as in your CRM system, and work with mailing creation and dispatch in Optimizely Campaign. You can send personalized content and measure campaign performance directly in CRM, and based on the data, design multistage and re-mailing campaigns.

See the **CRM integration guide** for an introduction to working with Optimizely Campaign and CRM systems.

CRM systems

Theme	Integration	Microsoft Dynamics CRM	Salesforce	SAP
DOI Round-Trip	Automatic synchronization of unsubscribes	✓	✓	✓
	Send DOI	✓	✗	✗
	Import DOI	✓	✓	✗
	Multiple DOI per entity	✓	✓	✓
	Flexible DOI mapping — Multi client mapping	✓	✓	✓
Campaigns	Selections in CRM	✓	✓	✗
	Start campaign	✓	✓	✗
	Assign Optimizely Campaign reactions	✓	✓	✗
	Transmission of custom fields	✓	✓	✓
Recipients	Synchronization of recipient	✓	✓	✓

Theme	Integration	Microsoft Dynamics CRM	Salesforce	SAP
	lists			
	Use Marketing Automation	✓	✓	✓
	Use Smart Campaigns functions	✓	✓	✓
	Custom fields	✓	✓	✓
Admin	Flexible client mapping	✓	✓	✓
	Scalability	✓	✓	✓
	Support newest versions	✓	✓	✓
	Full featured admin interface	✓	✓	✗
Messaging	Send transactional-mails	✓	✗	✗
	Omni-channel support (E-Mail, SMS, Mobile Push)	✓	✓	✓
	Bounce management	✓	✓	✓
Platform specific	Support PersonAccounts (Salesforce)	✗	✓	✗
	Support managed packages	✓	✗	✗

CRM integration guide

This section provides an introduction to working with Optimizely Campaign, and integrations with CRM systems. You can integrate email service providers with campaign management, and CRM and business and customer intelligence systems.

Optimizely Campaign provides email sending, and SMS, as well as synchronized advertising consents and recipient lists.

- Campaign management. With its closed-loop interface, Optimizely Campaign automatically captures transfer of recipient data and return of response data, for example opt-out and bounces, for flexible management of recipient data from the CRM system. You can enrich mailing openings, clicks, bounces, and unsubscriptions, so these events become available as leads or contacts in CRM.

- Opt-in management. You can exchange double opt-in information between Optimizely Campaign and a third-party system. Advertising consents can refer to many types of media, for example email, and SMS.
- Synchronize recipient data. Optimizely Campaign's entire range of features is available with the synchronization of recipient lists. Marketing Automation or Smart Campaigns are independent of a CRM system, and can return bounces and unsubscriptions.

Managing campaigns

CRM (customer relationship management) systems generally have the ability to define campaigns. Leads and contacts are added to a campaign – sometimes indirectly via marketing lists or dynamically via machine-learning algorithms – and campaign activities are subsequently defined and executed. Using the *closed-loop service*, you can transfer members of a campaign to Optimizely Campaign. With additional meta-information (Client ID and/or opt-in ID and mailing ID), the appropriate mailing is triggered in Optimizely Campaign. Events that follow the campaign, such as openings, clicks, bounces or unsubscriptions, are then made available to the CRM system. See Closed-loop Interface.

Personalizing and formatting a recipient

> **Note:** Contact customer support to help you define the **recipient list format** - the columns containing information transferred to Optimizely Campaign.

The recipient list must contain the desired personalization information. For example, to use recommendations from CRM, place the product information in the recipient list. To use a personalized greeting and/or complimentary close (so the contact's sales owner appears as point of contact in the salutation), transfer the corresponding sales owner fields.

You can also add recipient list fields to response data, making it easier to assign events in CRM, such as open or click. For example, providing two fields in the recipient list for identifier of entities, these can be transferred back in the response data.

Example: A contact has a unique ID **<contact-id>** and each campaign has a unique identifier **<campaign-id>**. Both fields are added to the recipient list, and the entities are transferred to Optimizely Campaign. When clicking the link in the sent email, the recipient receives the result with the corresponding **<contact-id>** and **<campaign-id>**, so you can assign events to a contact or a campaign response.

The displayed fields depend on the CRM system. Typical identification fields may be **<contact-id>**, **<lead-id>**, **<campaign-id>**, **<campaign-member-id>**, **<member-id>** or **<list-id>**.

Protocols and feedback

You can use either SFTP or SOAP protocols for data transfer. SOAP transfers the data via XML (extensible markup language); you have better performance with sending CSV files via SFTP, especially for large campaigns with several hundred thousand campaign members.

When a campaign is sent, Optimizely Campaign can create feedback messages such as an email notification. Optimizely Campaign can also call up SOAP services and systemically display the processing and send status.

Process sequence

After the CSV file is delivered or data transfer is completed through the SOAP service, no further action is required on the part of the CRM or the requesting party. The following process automatically takes place in Optimizely Campaign:

1. After successful transfer, the recipient data is automatically loaded into a recipient list. The recipient lists used for this purpose are subject to a check by the closed-loop services and have the **Z_CampaignUserList** prefix. Lists with this prefix are automatically created and managed. These special lists may not be used for other purposes – neither through interfaces nor through Optimizely Campaign's front-end. These lists may not be used, filled nor otherwise addressed using an Optimizely Campaign API (application programming interface) method.
2. After the recipient data is fully imported, the specified mailing will automatically be copied. If you start a campaign from the CRM system via the closed-loop service, you will also find a sent mailing in the mailing overview.
3. After the mailing is sent, results are recorded, prepared and made available. These include opens, clicks, bounces and unsubscriptions. Bounces and unsubscriptions are

directly linked to an email address and should be saved at the appropriate entities in CRM. For instance, there is no point in continuing to send messages to an email address that has bounced out. If someone unsubscribes, then this must be saved in the appropriate contact and/or lead and, if necessary, in an advertising consent.

> **Note:** Recipient lists match database tables. These are generally generated individually according to your requirements in a format specified by customer support. This format is static and may not be changed without consulting customer support.

broadmail_ID parameter

The **broadmail_ID** denotes a mailing. The advertising channel (email, SMS) also appears on the mailing. Therefore, the **broadmail_ID** can also be used to trace back the medium. In addition to the mandatory **broadmail_ID**, the CRM system can also issue a numerical **wave-ID** for a mailing, with which the mailing wave is identified. If a mailing is sent in multiple steps, then the mailing identity can be inferred using the **wave_ID**. The **broadmail_ID** and the **wave_ID** must be unique Grouping different mailings into one mailing wave is not possible. Furthermore, the recipient's email address is a mandatory field in the recipient list.

Example: The following code block shows an implementation example of how a campaign with two recipients can be started by Optimizely Campaign using SOAP services. The surrounding category provides the necessary member variables, for instance, the **closedLoopWebservice** object makes available the methods documented in the SOAP API.

```
/**
 * Use case: Initialise and start campaign
 * The following class is an implementation on how to start a campaign
 * via Closed Loop Webservice.
 */
private class ImportRecipientsAndStartCampaign extends UseCase {

    @Override
    void runExceptional() throws Exception {
        // create a waveId, fix the template mailing
        _waveId = _closedLoopWebservice.prepareNewWave(
                    _session.getSessionId(), TEMPLATE_CAMPAIGN_ID);
        // The recipient field names can be different for every client
```

```
        // and are defined once during the configuration process in
        // optivo broadmail. Within the example code we used
        // recipientFieldNames are for demo purposes with most common
        // used fields.
        String[] recipientFieldNames =
            { "salutation"
            , "firstname"
            , "lastname"
            , "title"
            , "birthday"
            , "mobile"
            , "email"
            , "street"
            , "zipcode"
            , "city"
            , "state"
            , "country"
            , "extentityid"
            , "extcampaignid"};
        String[][] recipientFieldValues =
            {
              { "Mr."
              , "John"
              , "Doe"
              , "Phd"
              , "17.2.1956"
              , "0049307680780"
              , "it-demo-mr@example.com"
              , "Wallstrasse 16"
              , "10179"
              , "Berlin"
              , "Berlin"
              , "Germany"
              , "SAP-321XWZ654987"
              , "SAP-987ABG654223"
              }
            , { "Mrs."
              , "Jane"
              , "Doe"
              , "Phd"
              , "17.2.1952"
              , "0049307680780"
              , "004930768078199"
              , "it-demo-mrs@example.com"
              , "Wallstrasse 16"
              , "10179"
              , "Berlin"
              , "Berlin"
              , "Germany"
              , "SAP-321XWZ654988"
              , "SAP-987ABG654223" } };
        _closedLoopWebservice.importRecipients(
            _session.getSessionId()
            , _waveId
```

```
            , recipientFieldNames
            , recipientFieldValues);
        // initialise the point in time the campaign will start to
        // generate response data
        _since = _closedLoopWebservice.getCurrentTime(
            _session.getSessionId());
        _closedLoopWebservice.importFinishedAndScheduleMailing(
            _session.getSessionId(), _waveId);
    }
}
```

You can request the mailing status after transferring a campaign. The following category shows the methods that need to be invoked.

```
/**
 * Use case: Receive campaign status.
 * Use this code to ask campaign status from optivo broadmail. This
 * makes sense after calling the use case "Initialise and start campaign"
 */
private class DetermineCampaignStatus extends UseCase {

    @Override
    void runExceptional() throws Exception {
        if (_waveId <= 0) {
            throw new IllegalStateException("waveId not positive.");
        }

        // Since the campaign is copied before it is started, we
        // have to translate the wave id to the campaign id that
        // was actually sent ...
        long campaignId;
        do {
            campaignId = _closedLoopWebservice.getMailingIdByWaveId(
                _session.getSessionId(), _waveId);
            if (campaignId <= 0) {
                sleepOneMinute();
            }
        } while (campaignId <= 0);

        // customise this to your needs. After a campaign switched to
        // status SENT, the status will be immutable
        while (true) {
            String campaignStatus = _mailingWebservice.getStatus(
                _session.getSessionId(), campaignId);
            if ("DONE".equals(campaignStatus)) {
                break;
            }
            if ("PAUSED".equals(campaignStatus) || "CANCELED".equals(
                campaignStatus))
            {
                throw new RuntimeException(
```

© Optimizely 2022

```
                    "Campaign is " + campaignStatus);
            }

            String campaignName = _mailingWebservice.getName(
                _session.getSessionId(), campaignId);
            // Log status for messages of campaign too.
            long[] messageIds =
                _splitMailingWebservice.getSplitChildIds(
                    _session.getSessionId(), campaignId);
            for (long messageId : messageIds) {
                String messageStatus = _mailingWebservice.getStatus(
                    _session.getSessionId(), campaignId);
                String messageName = _mailingWebservice.getName(
                    _session.getSessionId(), messageId);
            }
            sleepOneMinute();
        }
    }

    private void sleepOneMinute() throws InterruptedException {
        Thread.sleep(TimeUnit.MINUTES.toMillis(1));
    }
}
```

You can also show your campaign manager the available templates. The following example shows a query for the Smart Campaigns.

```
/**
 * Use case: Read available campaigns for closed loop scenario
 * This is a usability method. You can show available Smart Campaigns
 * to your campaign manager. Scenario for smart campaigns only.
 */
private class GetCampaignData extends UseCase {

    @Override
    void runExceptional() throws Exception {
        String campaignType = "regular";
        String campaignStatus = "ACTIVATION_REQUIRED";
        long[] campaignIds = _mailingWebservice.getIdsInStatus(
            _session.getSessionId(), campaignType, campaignStatus);
        for (long campaignId : campaignIds) {
            String campaignName = _mailingWebservice.getName(
                _session.getSessionId(), campaignId);
            String description = _mailingWebservice.getDescription(
                _session.getSessionId(), campaignId);
            long[] messageIds =
                _splitMailingWebservice.getSplitChildIds(
                    _session.getSessionId(), campaignId);
            for (long messageId : messageIds) {
                String messageName = _mailingWebservice.getName(
                    _session.getSessionId(), messageId);
```

```
                String messageDescription =
                    _mailingWebservice.getDescription(
                        _session.getSessionId(), messageId);
            }
        }
    }
}
```

Processing response data

Response data processing must be implemented when a campaign is being executed. Bounces, unsubscriptions and replies are part of these processes. You have the choice of using Optimizely Campaign's features for managing unsubscriptions or implementing proprietary processes in CRM. Processing unsubscriptions and replies is mandatory due to applicable rules on advertising consents and competition law.

Unsubscribing via Optimizely Campaign

An unsubscribe link must be included in every email. If the link points to Optimizely Campaign, the recipient is added to the unsubscribed list in Optimizely Campaign, and receives no more email. The unsubscribed list in Optimizely Campaign has precedence over additional mailings. This means that recipients do not receive emails even if they are included in a CRM selection which is transferred to Optimizely Campaign. The unsubscription can only be revoked using a new double opt-in process.

If the recipient has unsubscribed using the Optimizely Campaign processes, the unsubscription is sent back to the CRM using the closed-loop interface. The CRM system must process the unsubscriptions obtained in this manner and save them in applicable entities. The transferred selections may not contain any recipients that have effectively revoked their advertising consent.

If an unsubscription is performed via another method, such as through the customer center in a shop system, then these unsubscriptions do not necessarily have to be sent to Optimizely Campaign, provided that the unsubscriptions are actively saved in the referentially-leading system. In any case, it must be ensured that active unsubscriptions are not included in selections and campaigns sent to Optimizely Campaign.

© Optimizely 2022

Unsubscribing via third-party systems

If you use your own unsubscription links, Optimizely Campaign will not receive any information about unsubscriptions. Forwarding is not possible. In this case, the systemic responsibility for properly using advertising consents lies fully with CRM.

Reply emails

Recipients can answer emails and express additional requests such as an unsubscription. Either of these returned emails are processed in the Optimizely Campaign's user interface, or forwarded to the inbox of your choice, as configured in Optimizely Campaign.

Data formats

Each field in the recipient list can be filled via the closed-loop interface or HTTP API. The data format in the transferred files can be mapped to fields in the recipient list, irrespective of the set-up of the closed-loop interface. Therefore, the format of the recipient list does not necessarily match the one that the closed-loop interface expects. Contact customer support for exact data formats.

Conversely, the HTTP API can directly fill fields in the recipient list. The names of the HTTP parameters here must directly match the ones stated in the recipient list. See HTTP API.

Event emails

Event emails are typically triggered by a certain event. For instance, this can be a registration, or an order placement or cancellation. This type of email can ideally be sent over the HTTP API. Here, you can save a decided recipient list suitable for sending these special mailings. You can link as many mailings as you want to this recipient list and send result-based emails individually. This type of integration is also suitable for Marketing Automation campaigns triggered based on events and points in time.

Implementation example

The following code block shows an example of how response data can be retrieved.

```
/**
 * Use case: Get response data
 * This use case shows how to receive and process reponse data.
 * Response data are fetched within a certain interval, usually
 * 1-4 h, and processed according to your system needs.
*/
private class GetResponseData extends UseCase {

    @Override
    void runExceptional() throws Exception {
        long until = _closedLoopWebservice.getCurrentTime(
            _session.getSessionId());
        int numberOfRows = 1000;
        int startRow = 0;

        String[][] recipients;
        do {
            recipients = _closedLoopWebservice.getRecipients(
                _session.getSessionId(),
                _since, until, startRow, numberOfRows);
            processData(recipients);
            startRow += numberOfRows;
        } while (recipients.length >= numberOfRows);

        startRow = 0;
        String[][] clicks;
        do {
            clicks = _closedLoopWebservice.getClicks(
                _session.getSessionId(),
                _since, until, startRow, numberOfRows);
            processData(clicks);
            startRow += numberOfRows;
        } while (clicks.length >= numberOfRows);

        startRow = 0;
        String[][] opens;
        do {
            opens = _closedLoopWebservice.getOpens(
                _session.getSessionId(),
                _since, until, startRow, numberOfRows);
            processData(opens);
            startRow += numberOfRows;
        } while (opens.length >= numberOfRows);

        startRow = 0;
        String[][] links;
        do {
            links = _closedLoopWebservice.getLinks(
                _session.getSessionId(),
                _since, until, startRow, numberOfRows);
            processData(links);
            startRow += numberOfRows;
        } while (links.length >= numberOfRows);
```

```
        startRow = 0;
        String[][] responses;
        do {
            responses = _closedLoopWebservice.getResponses(
                _session.getSessionId(),
                _since, until, startRow, numberOfRows);
            processData(responses);
            startRow += numberOfRows;
        } while (responses.length >= numberOfRows);

        startRow = 0;
        String[][] unsubscribes;
        do {
            unsubscribes = _closedLoopWebservice.getUnsubscribes(
                _session.getSessionId(),
                _since, until, startRow, numberOfRows);
            processData(unsubscribes);
            startRow += numberOfRows;
        } while (unsubscribes.length >= numberOfRows);

        startRow = 0;
        String[][] mailingUnsubscribes;
        do {
            mailingUnsubscribes =
                _closedLoopWebservice.getMailingUnsubscribes(
                    _session.getSessionId(),
                    _since, until, startRow, numberOfRows);
            processData(mailingUnsubscribes);
            startRow += numberOfRows;
        } while (mailingUnsubscribes.length >= numberOfRows);

        _since = until;
    }

    // customize this method according to your needs. This
    // includes creating campign reactions or upsert subscription-
    // or bounce status to your entities.
    private void processData(String[][] values) {
        if (values.length == 0) {
            // process no values here
        } else {
            for (String[] click : values) {
                // process your business logic/campaign reactions here
            }
        }
    }
}
```

The following code demonstrates how a recipient's bounce status can be reset.

```
/**
 * Use case: Reset bounce status
```

```
 * This is an example of how to reset the bounce status
 * of a recipient.
 */
private class ResetBounceStatus extends UseCase {

    @Override
    void runExceptional() throws Exception {
        resetBounceCounter(EMAIL_ADDRESS);
    }

    private void resetBounceCounter(String emailAdress)
        throws WebserviceException {
        _responseWebservice.resetBounceCounter(
            _session.getSessionId(), emailAdress);
    }
}
```

Managing opt-ins

Optimizely lets you display multi-channel advertising consents, which can also be synchronized with different fields in the CRM (customer relationship management) system provided it has this feature. This lets a contact or a lead issue multiple different advertising consents for different newsletters, to get an overview of consents for channels in your CRM.

How it works

You can connect multiple clients in Optimizely Campaign from your CRM. The advertising consents in CRM are already saved or you already performed the necessary adjustments for them. In either case, the CRM provides a full view of recipients, and changes to the advertising consents from third-party systems carry over.

For example, the advertising consents can be represented by Boolean fields or a check box at the contact, lead, or account entities. They can refer to a channel (email, SMS) and/or a certain newsletter. The CRM does not have to make any content-related distinctions, and can immediately handle the consents. The types of consents (contact, lead, account) must be the same for relevant entities (Boolean value check box or tick box). The types of consents required depend on your campaign plans and data structure. You are responsible for depicting it in your CRM.

Events such as unsubscriptions or bounces relate to a specific advertising consent. For the systems involved to be consistently aware of the consent and related medium, you must save the appropriate information in CRM. The easiest way is using a table with the advertising consents you are using. In this table, each row represents an advertising consent where you can assign the consent using a unique identification. If you need to process an unsubscription from Optimizely Campaign, the transferred identification is used to determine the affected advertising consent. You can also delete advertising consents for the appropriate marketing channel for a contact or lead in case of a hard bounce. An email address bouncing has nothing to do with a specific advertising consent.

Data structure

This list shows a data structure for advertising consents:

- **opt-in-ID**. Generic field for a unique ID issued by CRM (not visible, quasi an AUTO-INCREMENT field, sequence or GUID).
- **description**. Unique name displayed to the user and used for identification (visible).
- **media-type**. Marketing channel. The user can select email, email and SMS in this drop-down list (visible).
- **broadmail-client-id**. Reference to a client-ID in Optimizely Campaign configured in CRM (visible).
- **reference-bounce**. Reference to a bounce field (visible). If empty, then no bounce is managed for the channel. Mandatory for email channel.
- **reference-opt-in**. Reference to an advertising consent in the contact, lead, or account entity. You can save the contact or lead field that needs to be administrated.

Instead of saving tables and references, you can archive the logic in code or XML files for simple applications. The data model in this example shows what advertising consents may look like when linking advertising consent to a client in Optimizely Campaign.

CRM-ID	Name	Reference field	Typ-e	Client	Reference bounces
AS103457612-04	Fan news-letter	crm.-custom.lead.fan-opt-in	Emai-l	1034452341-2435	crm.-custom.lead.fan-bounces
FG1045714561-2104	Premiu-m fur-	crm.-cus-tom.lead.premium-	Emai-l	14351098251-023	crm.-cus-tom.lead.premium-

CRM-ID	Name	Reference field	Typ-e	Client	Reference bounces
	niture	opt-in			bounces
SMS10016784-235	SMS ticker	crm.-custom.lead.sms-ticker-opt-in	SMS	14561234610-25	crm.-custom.lead.sms-ticker-bounces

Controlling campaigns and transferring data

If a campaign needs to be sent from CRM, select the advertising consent and the message template. You can determine the client to use in Optimizely Campaign by using the data model for advertising consents.

The technical connection of the closed-loop services must be expanded by additional fields in this scenario. The following additional parameters are transferred to Optimizely Campaign, in addition to the data of the determined recipient list: **consent description**, **opt-in ID** and **media type** (marketing channel). The opt-in ID and the media type are sent back to CRM as a component of the closed-loop circle for bounces, unsubscriptions, and so on. When an unsubscription or bounce occurs, CRM enters the cancellation of the advertising consent or the bounce into the appropriate entity (i. e. lead, contact) accordingly. Using the transferred parameters, you can tell which contacts/leads/accounts and which advertising consent are affected. You also can carry out additional actions through the **media-type** field, as described above.

Changing bounce or subscription status

Optimizely Campaign blocks an email address from sending more messages when there are too many bounces. You can change the *bounce status* of a recipient in CRM, for example when the recipient has ensured that the error would be resolved after a temporary problem. The usual design patterns for implementing this functionality as part of CRM are save interceptors or observers with which you can respond to data changes. This is only an example, if required the CRM will use its own design pattern for this case.

The bounce counter is set per client in Optimizely Campaign. Therefore, unlock clients in which the bounce counter was exceeded. You must save the appropriate information to CRM or, alternatively, reset the bounce counter in configured clients. To do this, use the resetBounceCounter method from the **responseWebservice**, carefully following the instructions in the documentation on changing the media type (marketing channel).

To set the *subscription status*, use the advertising consent to determine the correct client, then trigger a new DOI process for the subscription in question. Unless the unsubscriptions are also processed in Optimizely Campaign, you should manage the DOI process using Optimizely Campaign also. In this case, an unsubscription is re-delivered after a successful DOI.

Synchronizing recipient data

Data such as reports, marketing lists, or comparable filters in recipient lists, contained in CRM (customer relationship management) , should be individually copied into Optimizely Campaign, for example with a daily transfer.

To manage campaigns in Optimizely Campaign, copy the recipient data from your CRM into the regular recipient lists. Depending on requirements and the CRM data structure, you can define fixed export formats. CRM users can filter contacts, leads and/or accounts through reports or marketing lists, which are automated and regularly transferred to Optimizely Campaign. Using a CMS database, you can fill recipient lists in clients in Optimizely Campaign, and use the data for Smart Campaigns and other Optimizely Campaign features.

Implementation

- Relate the selection of recipients to precisely one advertising consent.
- Do not mix advertising consents.
- Specify the desired fields with customer support beforehand.
- Transfer technical fields: opt-in-id, description, media-type, entity-type (contact, lead, account, ...), entity-id (ID of the contact/lead/account from CRM).

Incremental export processes have proved less robust. You should clear the list daily using the clear method from **RecipientWebservice**, and fully re-fill it using the addAll3 method from **RecipientWebservice**.

Unsubscriptions and bounces from Optimizely are imported into CRM before the data transfer using two CSV files (bounces and unsubscriptions), requested by Optimizely Campaign via SOAP. This prevents unsubscribed and bounced out subscribers from being re-added to the recipient list during the copy process.

Response data

Response data is asynchronously prepared through regular, ongoing jobs (once a day by default). Shorter intervals can also be configured depending on your requirements. The lifetime of the response data is set between 14 and 30 days. The recipient list is recycled after a certain period of time when using the closed-loop interface. Response records are still available, but can no longer be clearly categorized.

If recipient data from synchronized recipient lists is used for campaigns in Optimizely Campaign, then the respective campaign context is unknown in CRM and it does not make sense to make information such as opens or clicks available to CRM in the feedback channel. This data can be made available if the CRM can process it.

In contrast, bounces and unsubscriptions refer to entities such as contact, lead, or account in CRM. This data is made available and needs to be processed by CRM. The applicable bounce status or the advertising consent must be then set to the applicable entities.

If a response data flow is configured, then the response data is exported for a client's mailings, which you can import into CRM. It does not matter whether an email is sent via the HTTP API, as a campaign email via closed-loop, or as a standalone mailing in Optimizely Campaign. The opens and clicks are ignored for campaign responses that did not have any campaign in the CRM.

Concluding information

- Blocklists use the email address as a primary criterion. If an email address is entered into the blocklist, then no emails are sent to the address. You can manage blocklists using Optimizely Campaign's front-end.
- All features can be used in parallel in Optimizely Campaign. Note the limitations for the recipient lists.
- Use UTF-8 as data format.
- Use unique file names, including when delivering campaign data.
- If you use the file API, use the header rows to make troubleshooting easier.

© Optimizely 2022

Salesforce add-on

> **Note:** This topic is for administrators and developers with administration access rights in Salesforce.

With the Salesforce add-on, you can send mailings from Salesforce, and use contact and lead data to automatically personalize the content. You can transfer customer-specific fields (up to the third level) to recipient lists, and personalize salutations for leads and contact owners. After the mailing is sent, you receive response data such as openings, clicks, outbounces, direct replies and unsubscriptions for each recipient.

Features and supported versions

The following features are supported for Enterprise, Unlimited, and Performance Editions:

- Campaign management.
- Transfer of recipient data.
- Transfer of response data: Openings, clicks, direct replies.
- Synchronization of unsubscriptions and bounces.
- Support for contacts, leads, and personal accounts.
- Administration of advertising permissions for the marketing channels of email and text message.
- Import of advertising permissions (double opt-in) submitted via Optimizely Campaign.
- Synchronization of contacts, leads, and personal accounts with Optimizely Campaign recipient lists.

Setup

To set up the Salesforce add-on, contact customer support. Provide Optimizely with the following information:

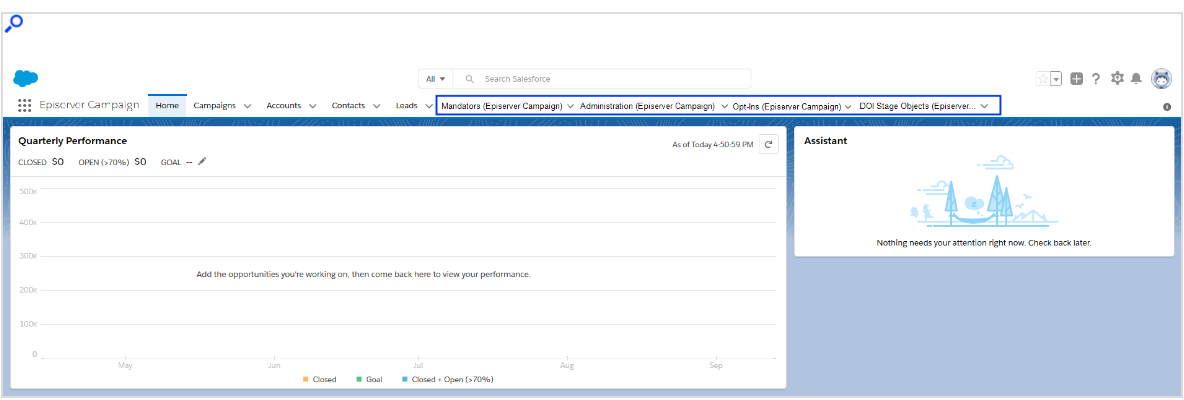
- Your SOAP API user name in Optimizely Campaign. If you do not have a SOAP API user account, contact customer support. Use a separate email address that is not used for logging into Optimizely Campaign.

- Any additional CRM data in addition to the standard data you want to be transferred to the Optimizely Campaign recipient list. See Configuring the integration.
- The client IDs for the integration. To see the client ID, open the Optimizely Campaign menu and select **Administration** > **API overview** > **SOAP API**.

Installation

The Salesforce add-on is delivered as an **Unmanaged Package**. Install this package independently in your Salesforce Org according to the standard Salesforce approach. If you need help with the installation, contact customer support. After the installation is complete, you can access the Salesforce add-on features via the following tabs:

1. **Mandators (Episerver Campaign)**: Store the access data for your Optimizely Campaign clients in this tab.
2. **Administration (Episerver Campaign)**: This tab contains options for configuring, starting, and stopping the data exchange between Optimizely Campaign and Salesforce.
3. **Opt-Ins (Episerver Campaign)**: Configure and manage the advertising permissions for your leads, contacts, and personal accounts in this tab.
4. **DOI Stage Objects (Episerver Campaign)**: In this tab, manually assign double opt-in advertising permissions (see Manual assignment of double opt-ins) that cannot be automatically linked to a lead, contact, or personal account. This is the case if a data set – for example an email address – exists multiple times in Salesforce and is therefore not unambiguous.



Configuring advertising permissions

> **Note:** This topic is for administrators and developers with administration access rights in Salesforce.

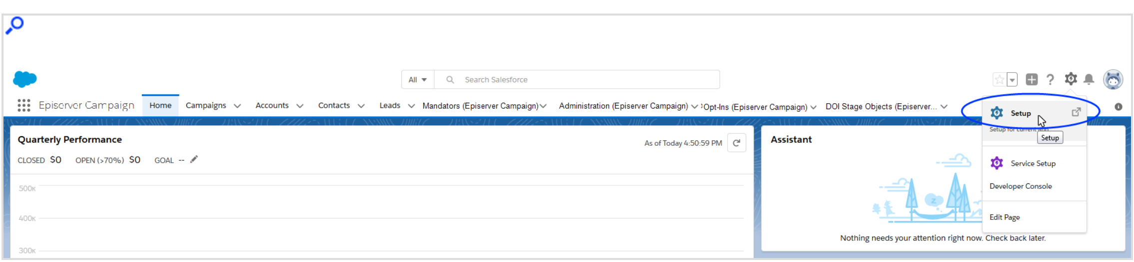
The Salesforce add-on supports the administration of advertising permissions for the marketing channels of email and text message in your Salesforce Org. It is also possible to import double opt-ins from Optimizely Campaign.

The configuration of advertising permissions consists of the following steps:

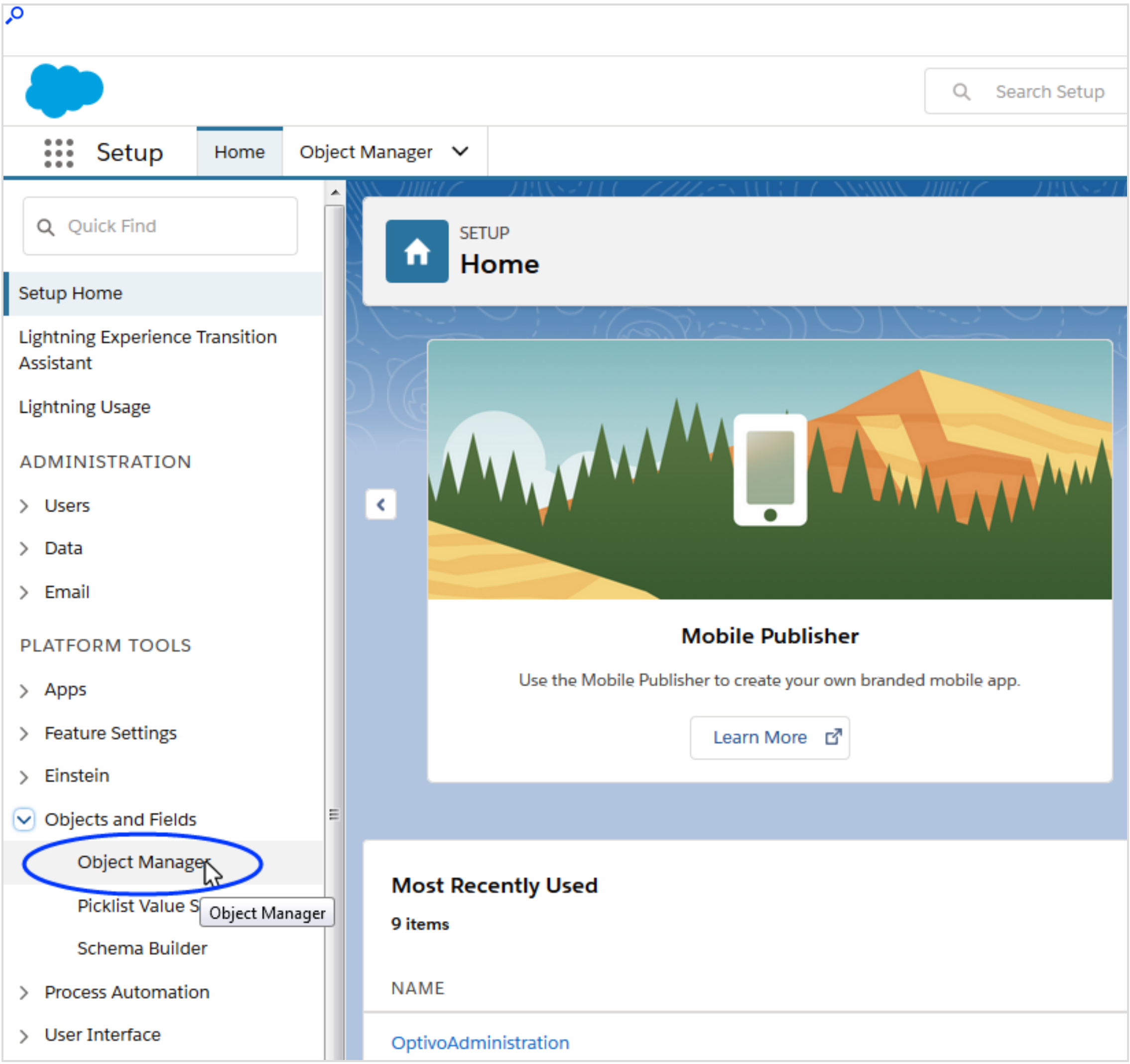
1. Create Boolean reference fields (true/false) for the marketing channels you use (email, text message) for your leads, contacts, and personal account. The reference fields will later be displayed in the personal information of your leads, contacts, and personal accounts as check boxes (**Advertising permission present** or **Advertising permission not present**).
2. In Salesforce, configure your Optimizely Campaign clients.
3. Assign the created reference fields to an advertising permission with the corresponding marketing channel.
4. Enable automatic import to import completed double opt-ins from Optimizely Campaign.
5. Alternatively, you can assign double opt-ins manually.

Creating reference fields

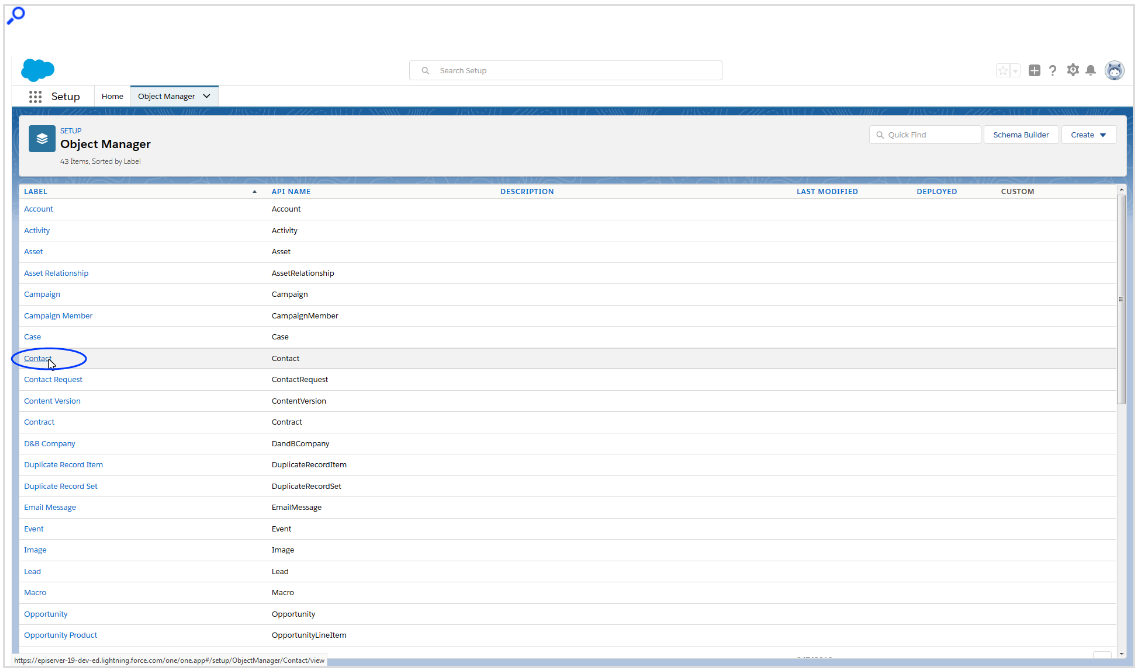
1. Go to the **Setup** area in Salesforce.



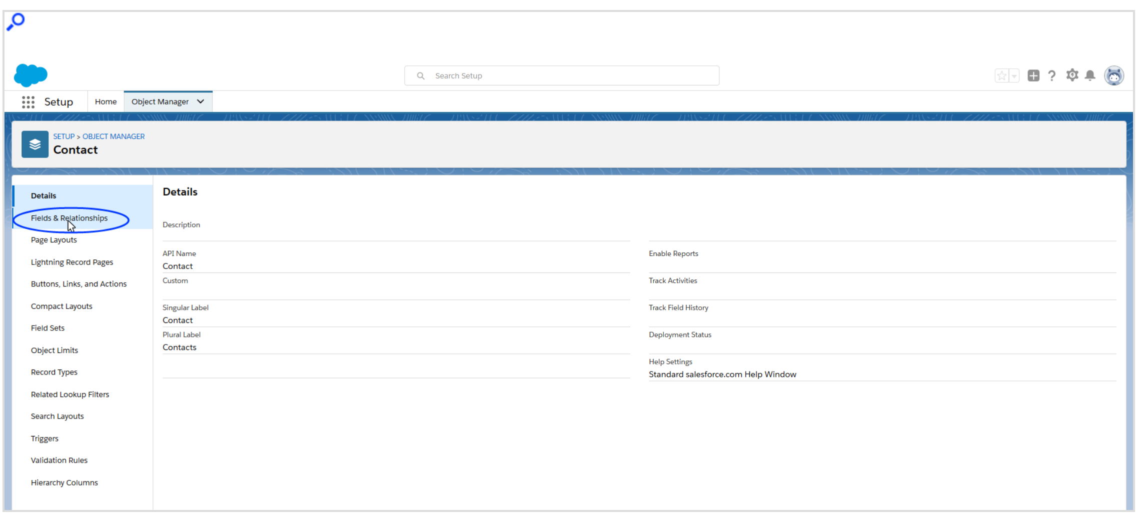
2. In the left menu bar, click **Objects and Fields** > **Object Manager**.



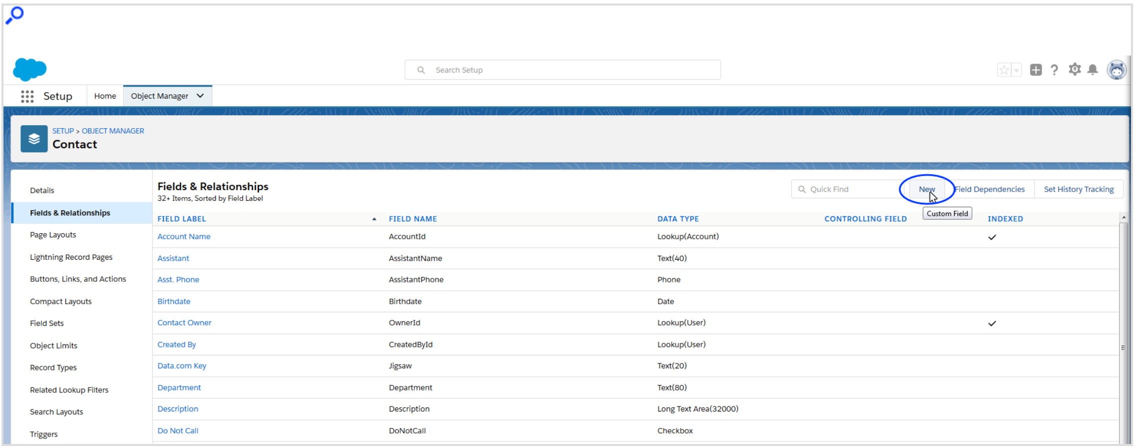
3. In the **Object Manager** window, select the entity that you want to create a new reference field for, such as **Contact**.



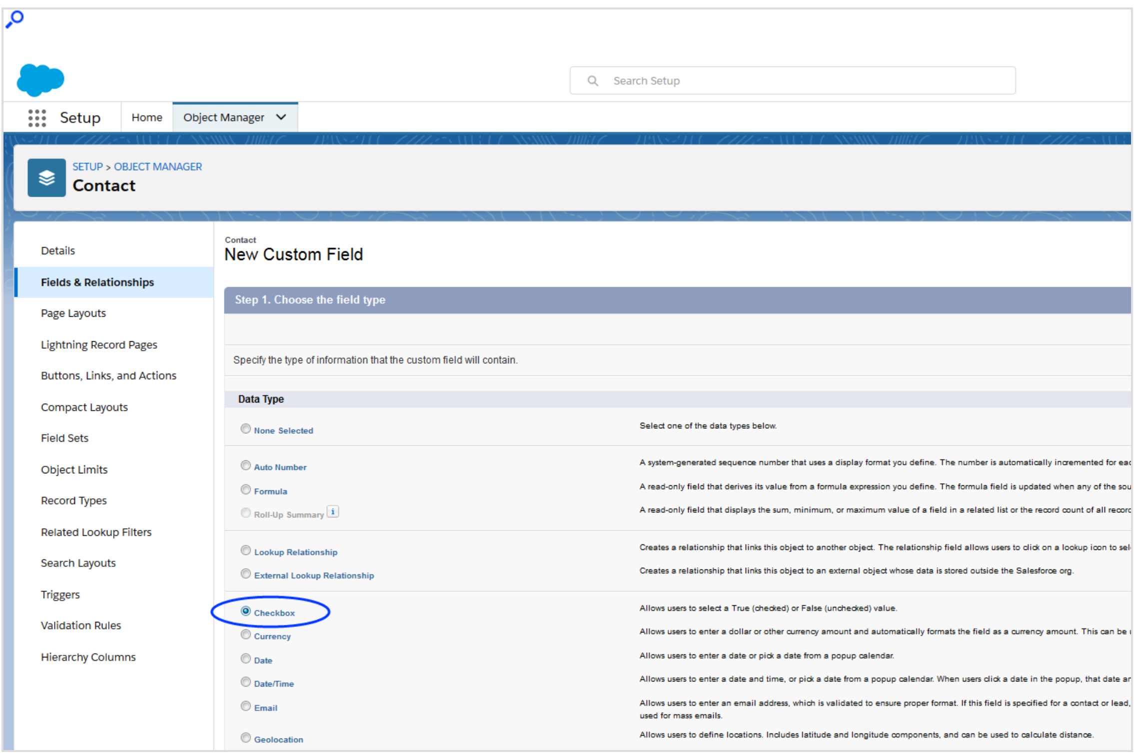
4. In the **Object Manager** window of the selected entity, click **Fields & Relationships**.



5. Click **New**.

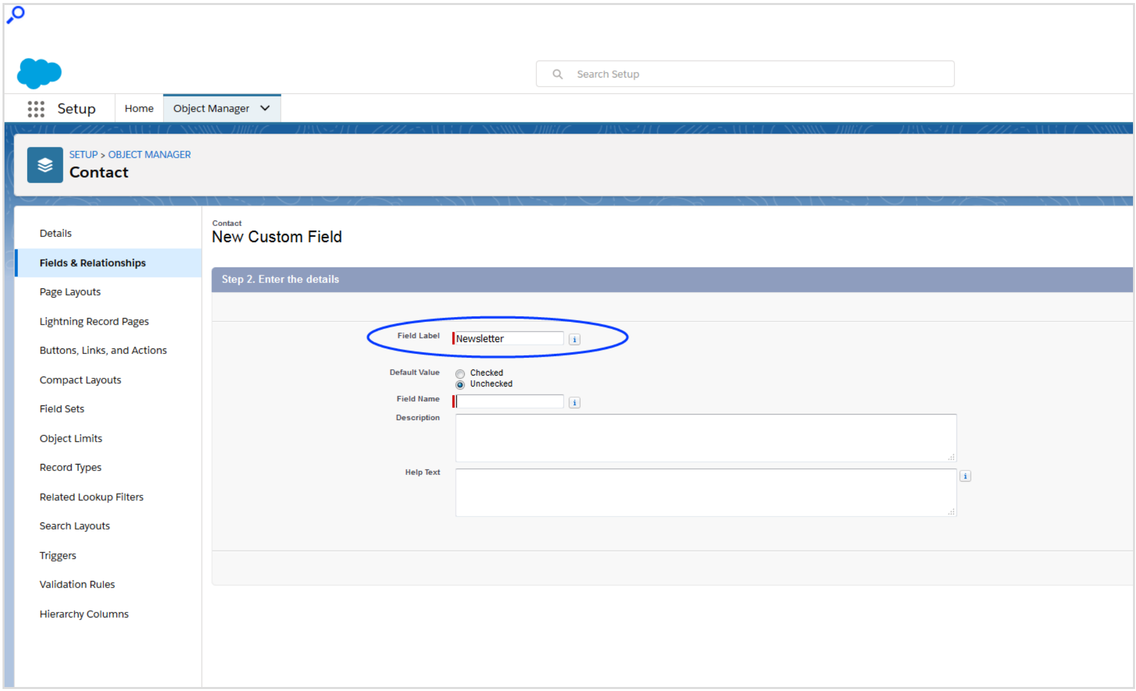


6. In the **New Custom field** window, select the **Checkbox** option under **Data Type**.



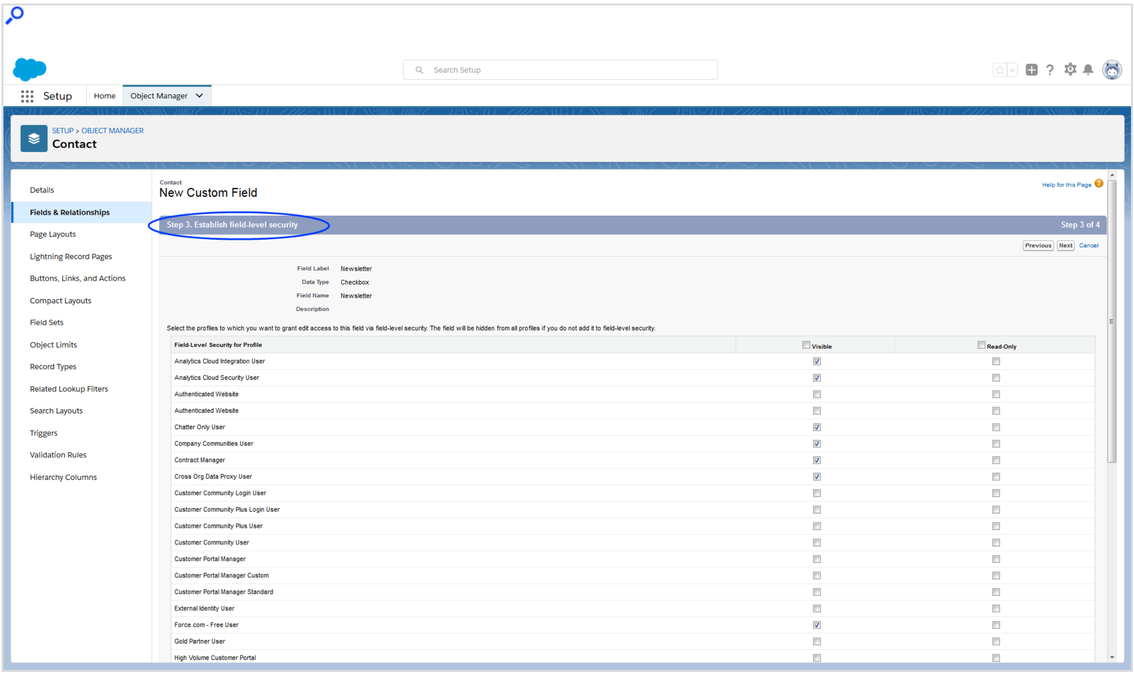
7. Click **Next**.

8. Enter a name for the new field in the **Field Label** field, for example *Newsletter*.

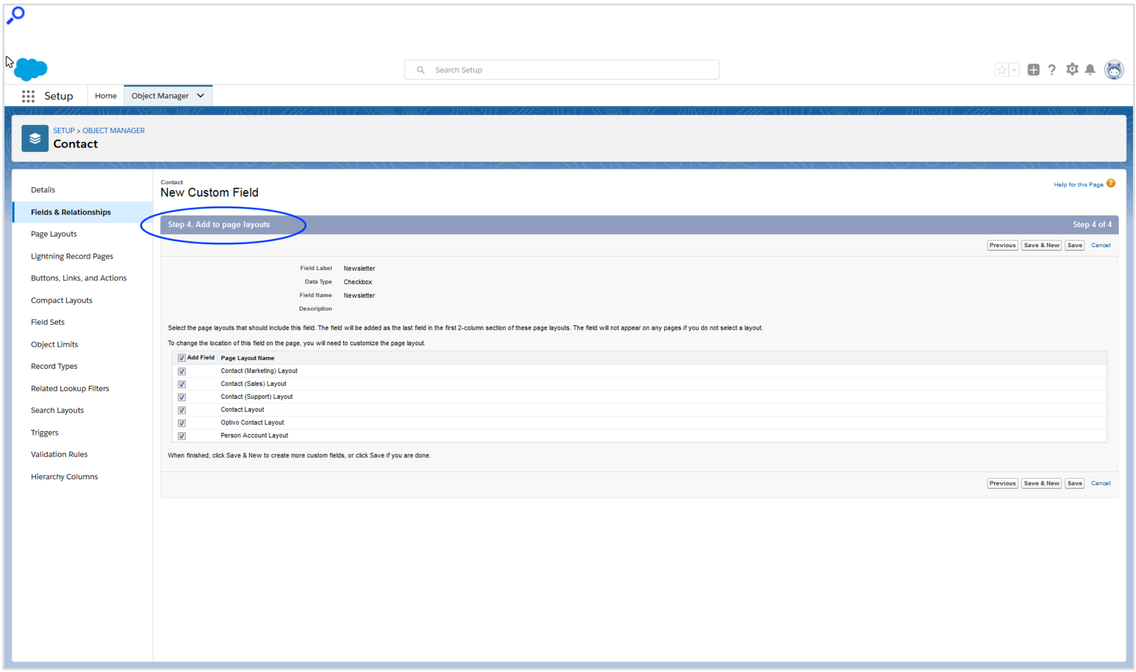


9. Under **Default value**, leave the option on **Unchecked**.
10. The selected field name will automatically be added in the **Field name** field. Optionally, enter another field name.
11. Optional: Enter a description in the **Description** field.
12. Optional: Enter a help text in the **Help Text** field.
13. Click **Next**.

14. Configure the field level security according to your requirements.



15. Click **Next**.
16. Add the page layouts according to your requirements or remove unneeded page lay-outs.



17. Click **Save**.

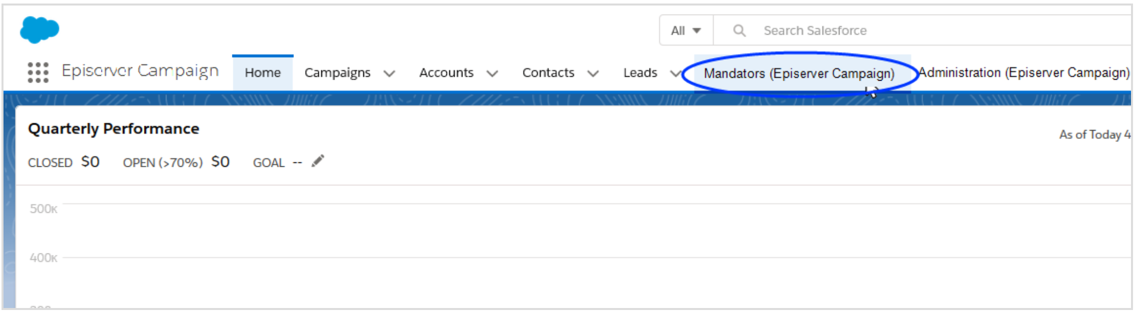
Repeat the steps for the other marketing channels you use and for the corresponding entities (leads, contacts, personal accounts).

> **Tip:** Create identical fields for leads, contacts, and personal accounts. In this way, advertising permissions will be automatically transferred if a lead becomes a contact, for example. If you create different fields, you need to use **Rules** to transfer the advertising permission (such as from a lead that has become a contact).

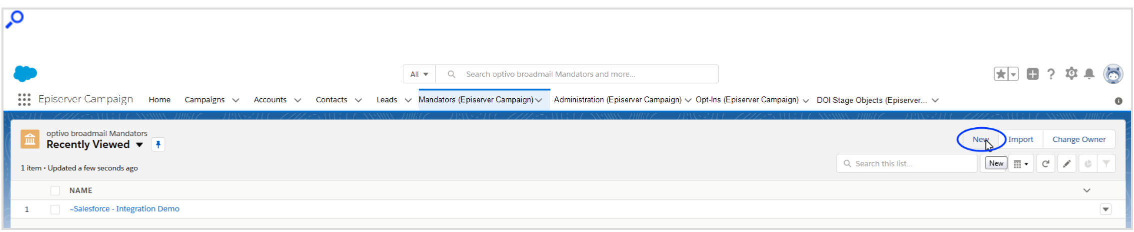
Storing client IDs and SOAP API user data

> **Note:** If you do not have a SOAP API user account, contact customer support.

1. Log in to Salesforce CRM.
2. Open the **Mandators (Episerver Campaign)** tab.

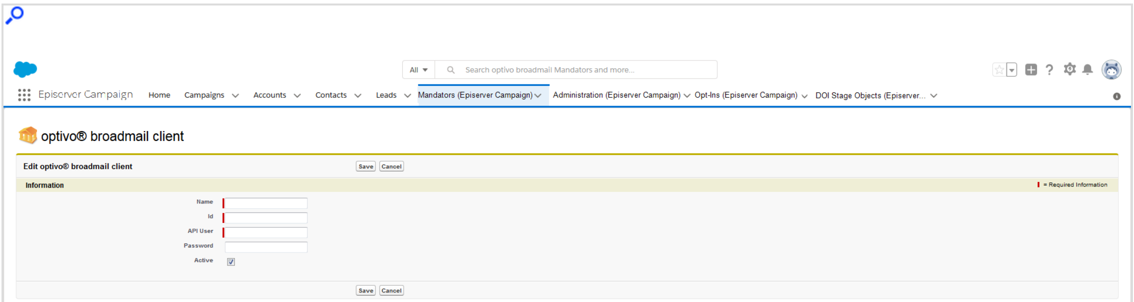


3. Click **New** to create an Optimizely Campaign client in Salesforce.



> **Tip:** If you would like to change the settings of a previously created client, click the respective client and then **Edit**. The list views in Salesforce may hide clients. If necessary, click **All** in the list views.

4. In the Optimizely Campaign **Client** window, specify the following fields:
   a. **Name**. Name of the client (as it should be displayed in Salesforce). You can chose the name freely. For greater clarity, use the same name as in Optimizely Campaign.
   b. **Client ID**. Client ID. To see the client ID, open the Optimizely Campaign menu and select **Administration** > **API Overview** > **REST API**.
   c. **API User**. Your SOAP API user name.
   d. **Password**. Your SOAP API password.
   e. **Active**. Select the check box.

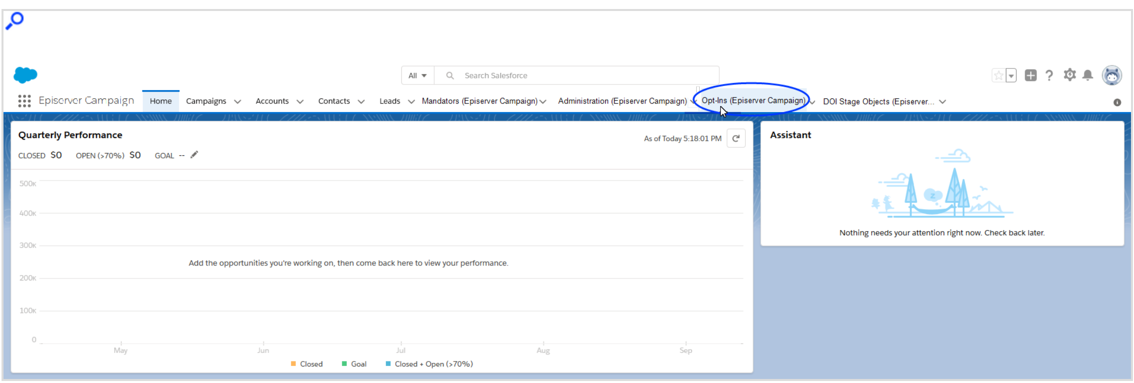


5. Click **Save**.

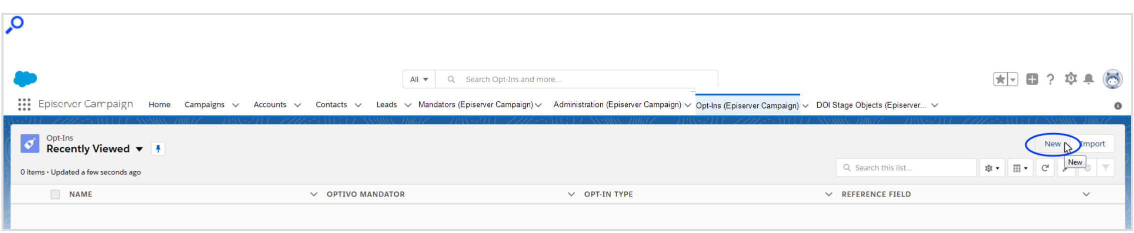
Repeat these steps for additional clients to connect to Salesforce CRM.

Assigning reference fields

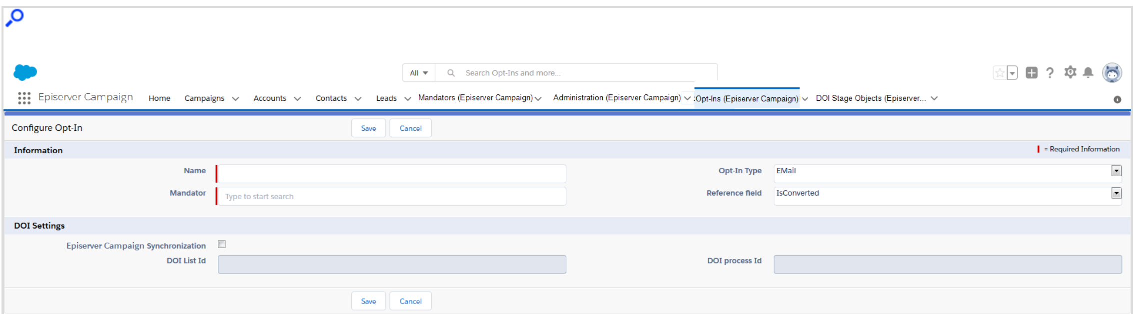
1. Open the **Opt-Ins (Episerver Campaign)** tab.



2. In the **Opt-Ins (Episerver Campaign)** window, click **New**.



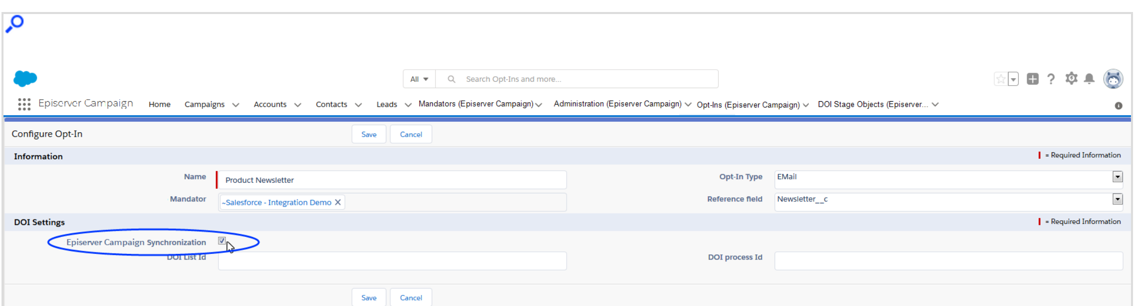
3. In the **Configure advertising permission** window, specify the following fields:
    a. **Name**. Name for the advertising permission (for example *Product newsletter*).
    b. **Mandator**. Optimizely Campaign client to which the advertising permission is to be assigned.
    c. **Opt-In Type**. In the drop-down list, select the marketing channel for which the advertising permission applies (for example *Email*).
    d. **Reference field**. In the drop-down list, select the reference field that you want to assign the advertising permission to (the Boolean field that you have created the advertising permission for, see Creating reference fields).



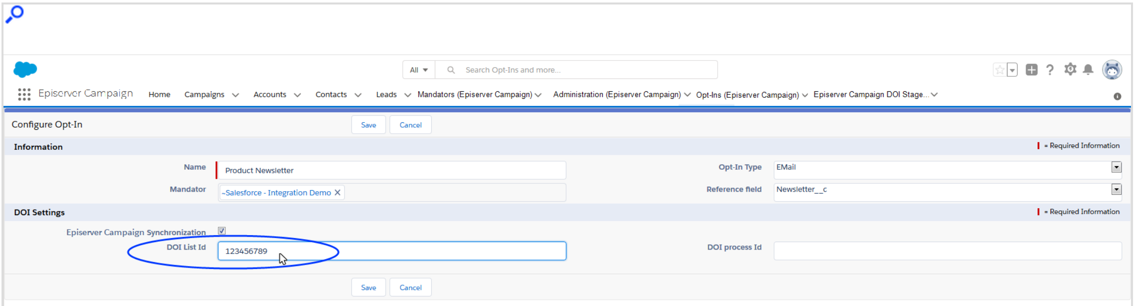
4. Click **Save**.

Importing opt-ins from Optimizely Campaign

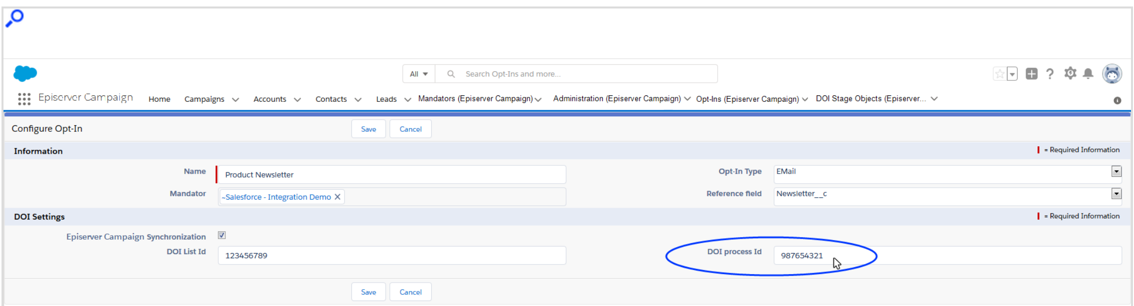
1. Select the check box **Episerver Campaign Synchronization**.



2. In the **DOI list Id** field, enter the ID of the recipient list containing the double opt-ins. To see the recipient list ID, open the Optimizely Campaign menu and select **Administration** > **API overview** > **Recipient lists**.



3. In the **DOI process Id** field, enter the ID of the opt-in process. To see the opt-in ID, open the Optimizely Campaign menu and select **Administration** > **API overview** > **Opt-in processes**.

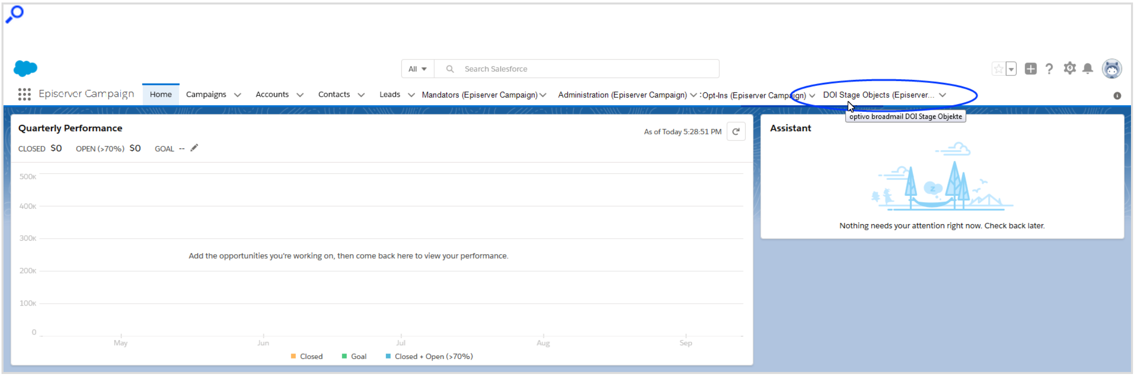


4. Click **Save**.

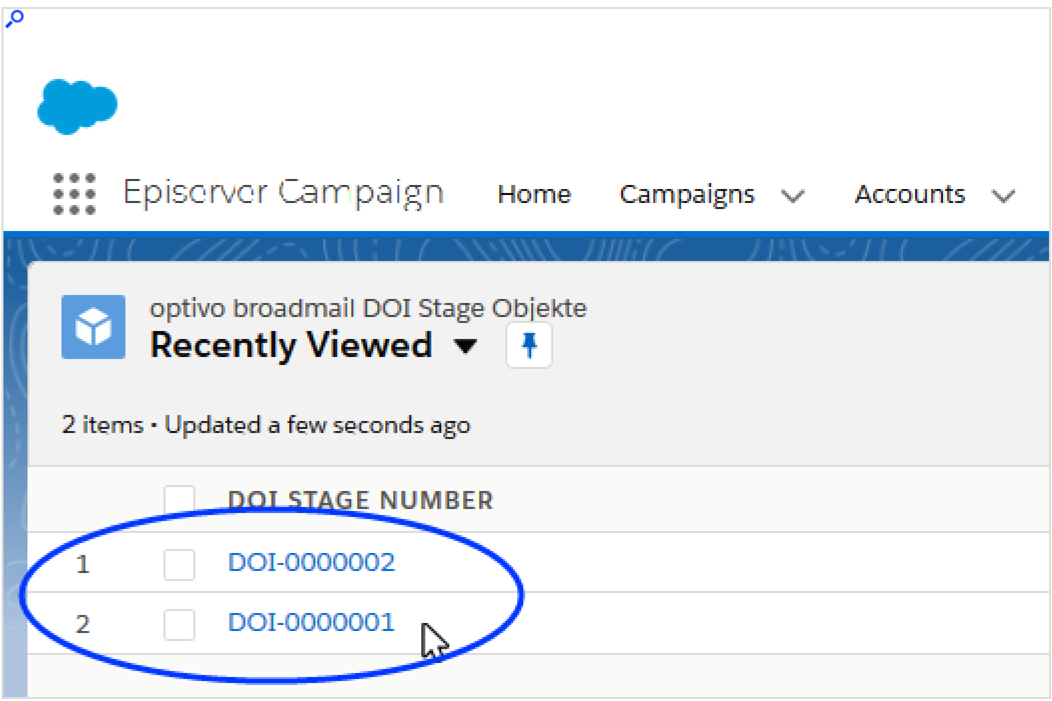
Manual assignment of double opt-ins

If a double opt-in advertising permission via Optimizely Campaign has not been assigned – because it has multiple contacts or leads for the same email address, for example – you need to assign it manually. Perform the following steps:

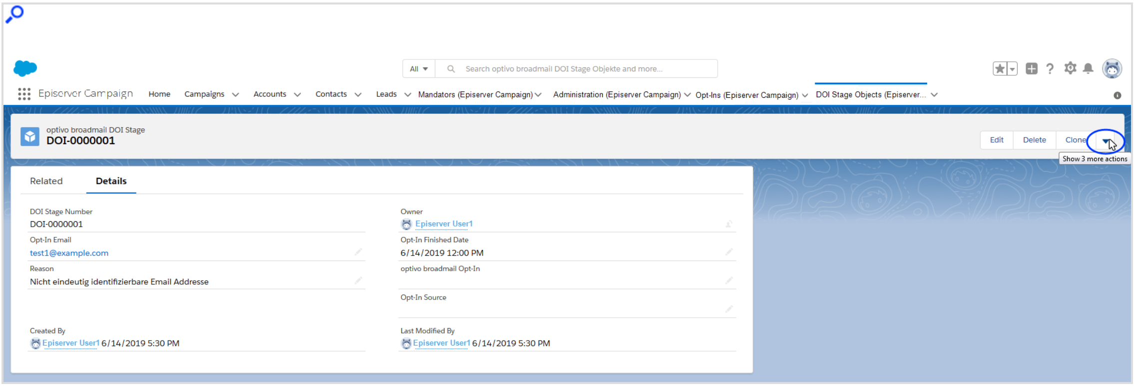
1. Open the **DOI Stage Objects (Episerver Campaign)** tab.



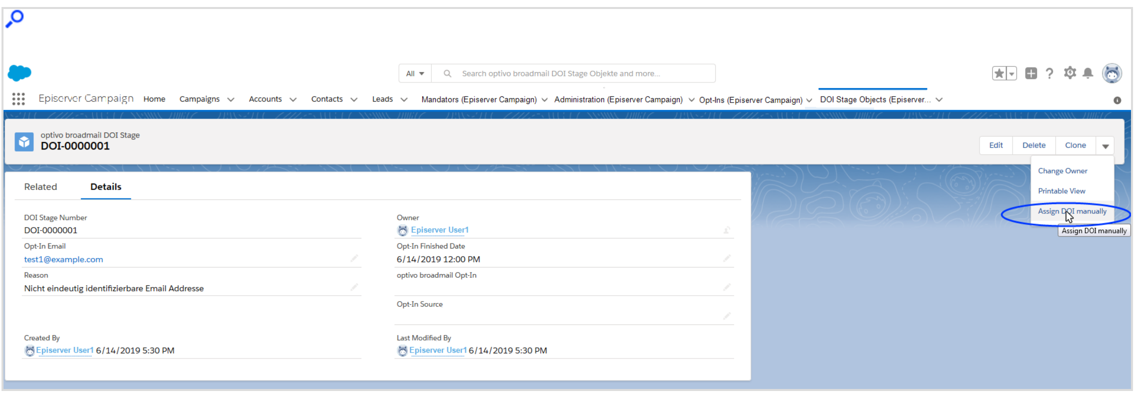
The **DOI Stage Objects (Episerver Campaign)** window shows you the advertising permissions that were unable to be assigned automatically.

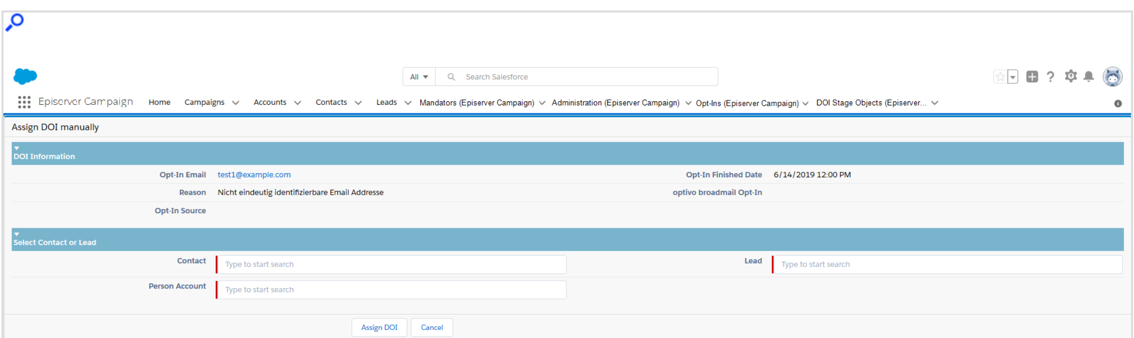


2. To see detailed information about an advertising permission, click the unassigned advertising permission.
3. To assign the advertising permission, click the downward-pointing triangle on the upper right.

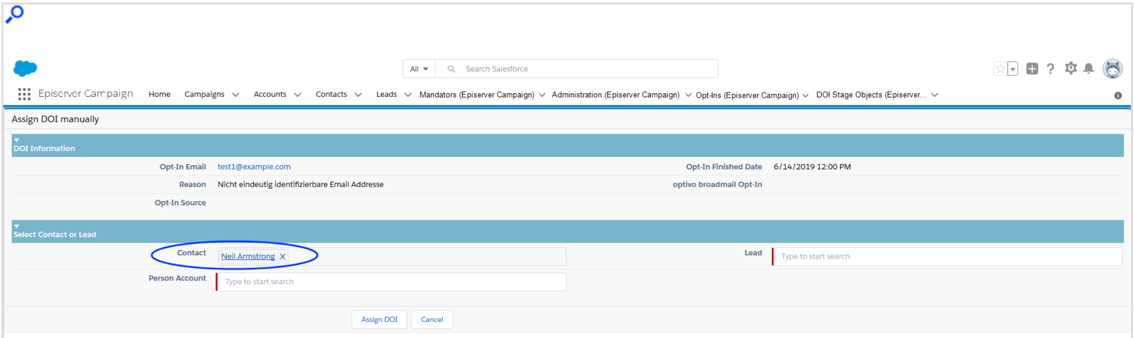


4. Select **Assign DOI manually** in the drop-down list.

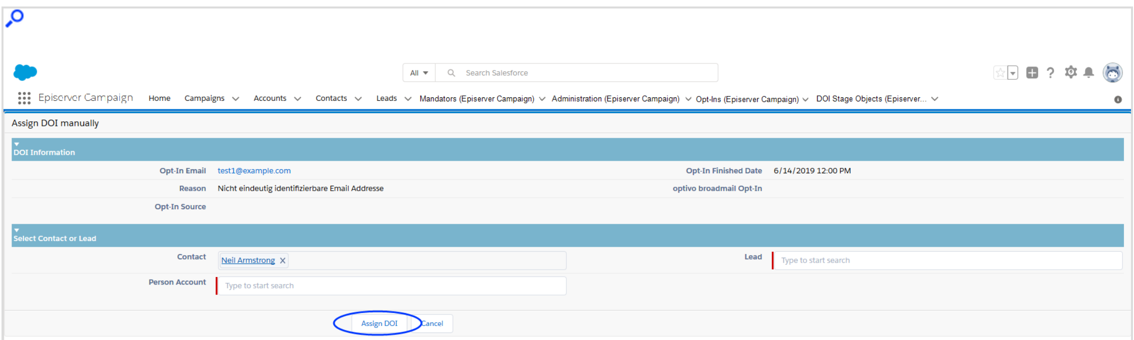




5. Under **Select Contact or Lead**, search for the person to whom you want to assign the double opt-in advertising permission.



6. Click **Assign DOI**.



Repeat the steps for every advertising permission that has not been assigned.

Tip: Check regularly whether marketing permissions are unable to be assigned and then assign them manually. This keeps your database updated at all times.

Configuring data fields

Note: This topic is for administrators and developers with administration access rights in Salesforce.

This topic describes how to configure data fields in Salesforce to send contact data of leads or contacts to Optimizely Campaign.

Transferring default data fields

You can use contact data of leads or contacts to personalize mailings and for target group segment in Optimizely Campaign. See Field functions and Target groups.

By default, the following data is sent from Salesforce to Optimizely Campaign:

Field name	Data type	Description
email	String	Email address of the contact or lead
salesforceid	String	Unique ID for the contact/lead in Salesforce
sfcampaignid	String	Unique ID of the Salesforce campaign
entity_type	String	Contains the type of the **Lead**, **Contact**, or **Personal Account** type
optinname	String	Name of the opt-in
optintype	String	Media type of the opt-in
salutation	String	Recipient's salutation
firstname	String	Recipient's first name
lastname	String	Recipient's last name
title	String	Recipient’s title (for example Dr., Prof. and so on)
mobilephone	String	Recipient's mobile telephone number
fax	String	Recipient's fax number
street	String	Recipient’s street and house number from the **Lead** type
postalcode	String	Recipient’s postal code from the **Lead** type

Field name	Data type	Description
city	String	Recipient’s place of residence from the **Lead** type
state	String	Recipient’s state from the **Lead** type
country	String	Recipient’s country from the **Lead** type
birthdate	Date	Recipient’s date of birth from the **Contact** type
mailingstreet	String	Recipient’s street and house number from the **Contact** type
mailingpostalcode	String	Recipient’s postal code from the **Contact** type
mailingcity	String	Recipient’s city from the **Contact** type
mailingstate	String	Recipient’s state from the **Contact** type
mailingcountry	String	Recipient’s country from the **Contact** type

Transferring additional fields

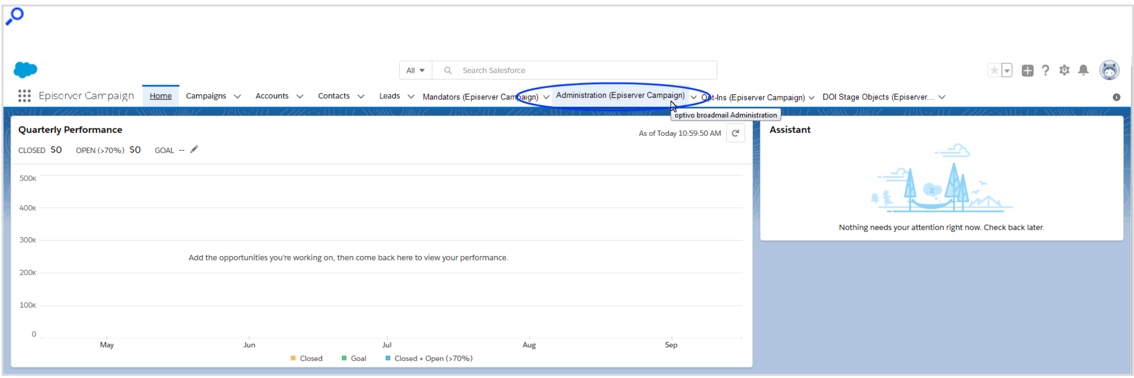
In addition to the standard setup, you can transfer other Salesforce data fields to Optimizely Campaign. The Salesforce add-on can directly access linked data sets (Salesforce objects up to the third level). For example, the contact person who manages the contact or lead in your organization, or the name of the department head, in addition to contact or lead data and attributes.

This lets you, for example, customize greetings, so that a contact or lead is greeted by the member in your organization that manages the lead or contact.

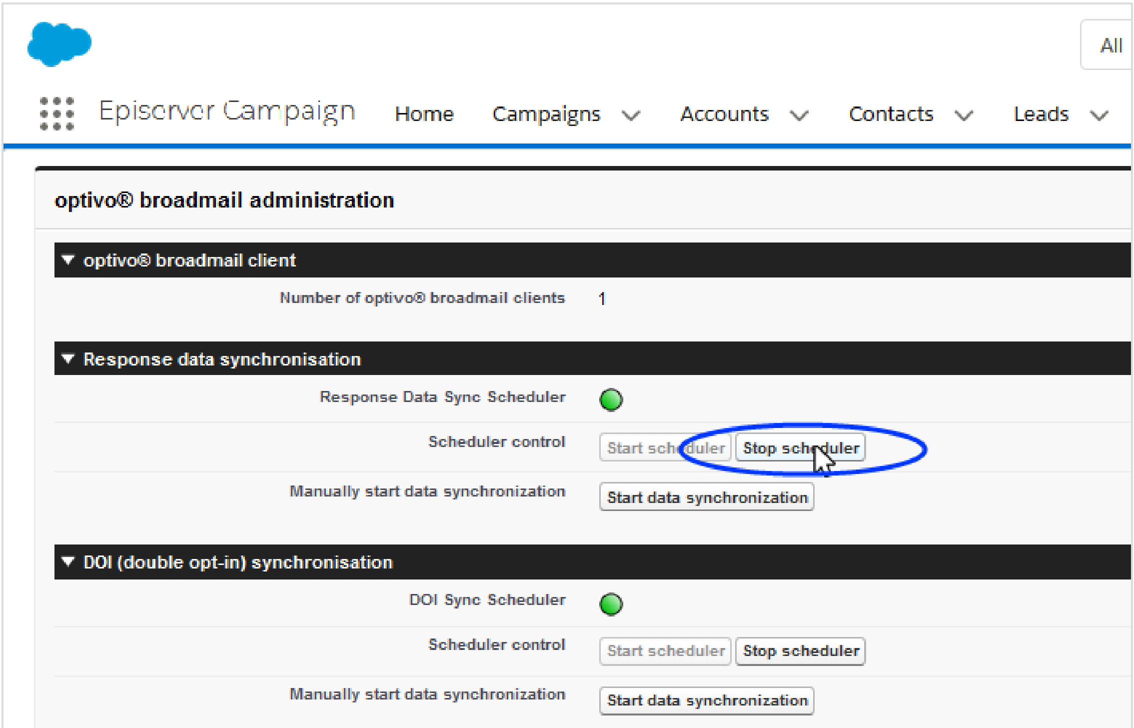
To set up the transfer, first configure the additional data fields in Salesforce. Then, contact Optimizely customer support to request the addition of these fields to your recipient lists.

Configuring additional data fields

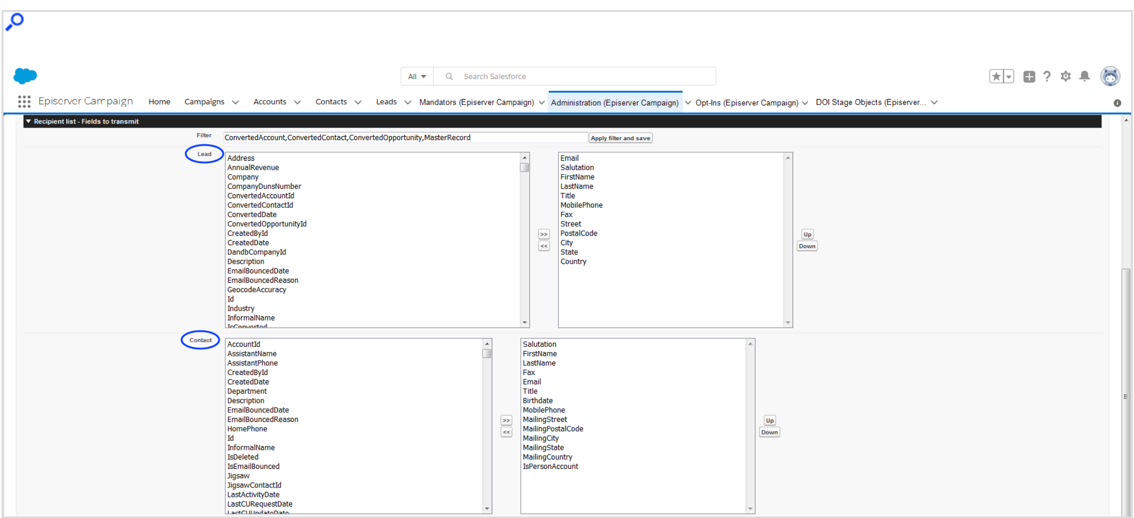
1. Log in to Salesforce CRM.
2. Open the **Administration (Episerver Campaign)** tab.



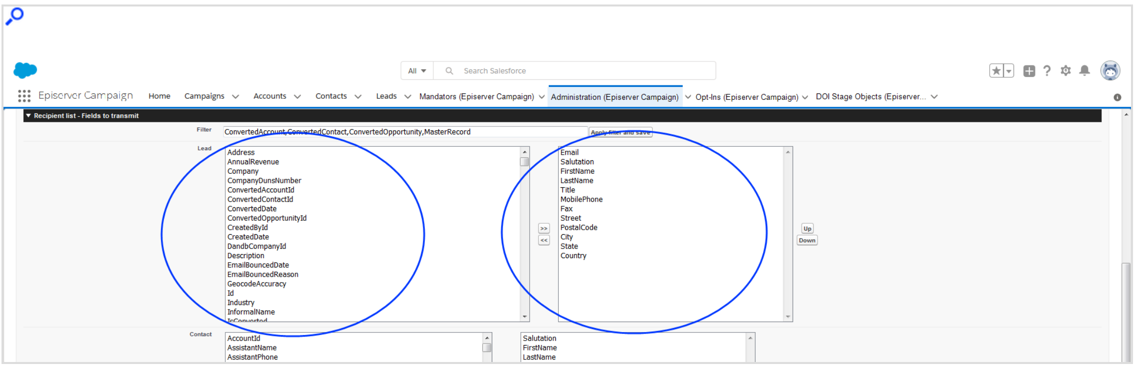
   The **Administration (Episerver Campaign)** window opens. In the fields area, you can find the data fields that can be transferred to Optimizely Campaign, separated by leads, contacts, and personal accounts.
3. When data synchronization is enabled, you can disable data synchronization by clicking **Stop scheduler** next to **Scheduler control**.



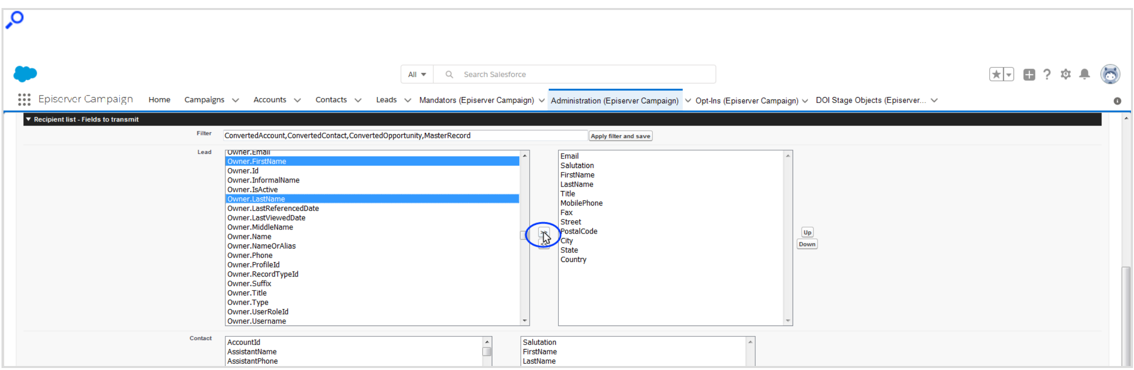
4. In the lists on the left under **Lead**, **Contact**, or **Personal Account**, select the data field that you want to transfer to Optimizely Campaign. To select multiple data fields at the same time, hold down the **CTRL** key on your keyboard.



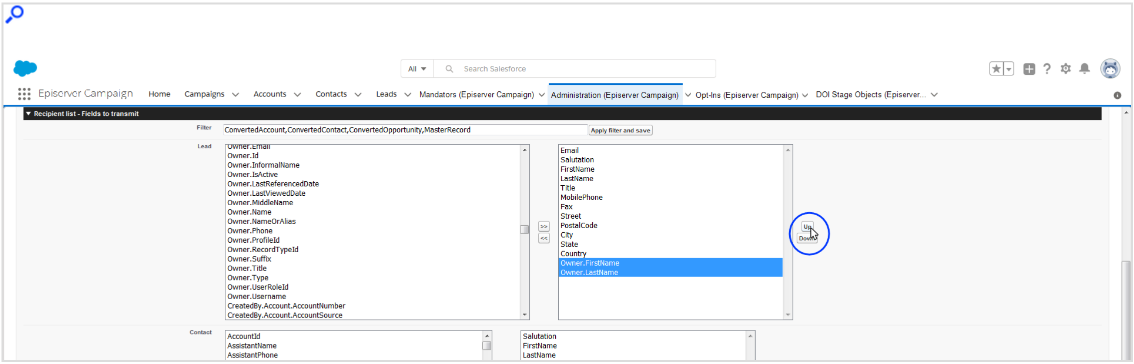
Note: The lists on the left contain Salesforce objects that can be transferred. Lists on the right contain objects that are currently transferred.



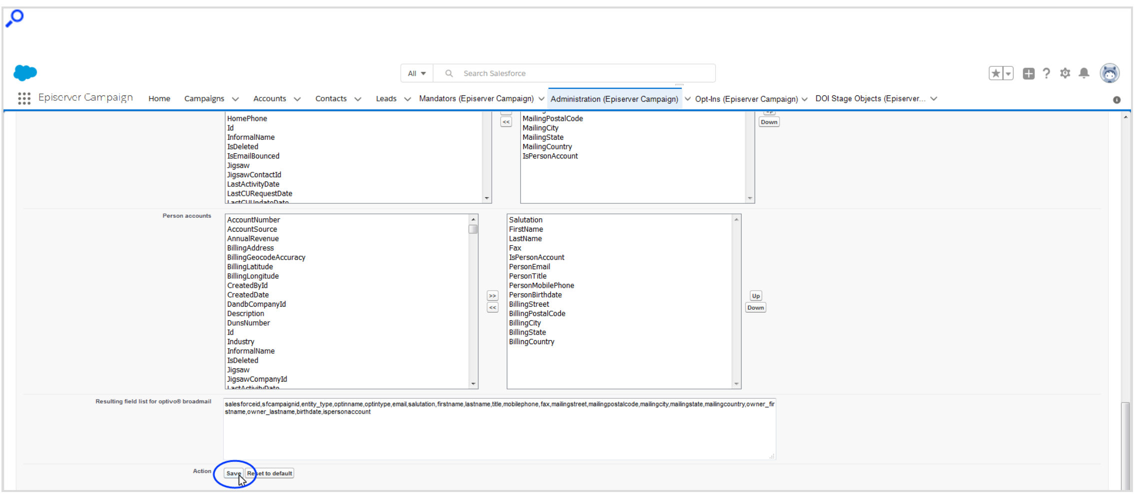
5. To add one or more data fields, click the right arrows **>>**.



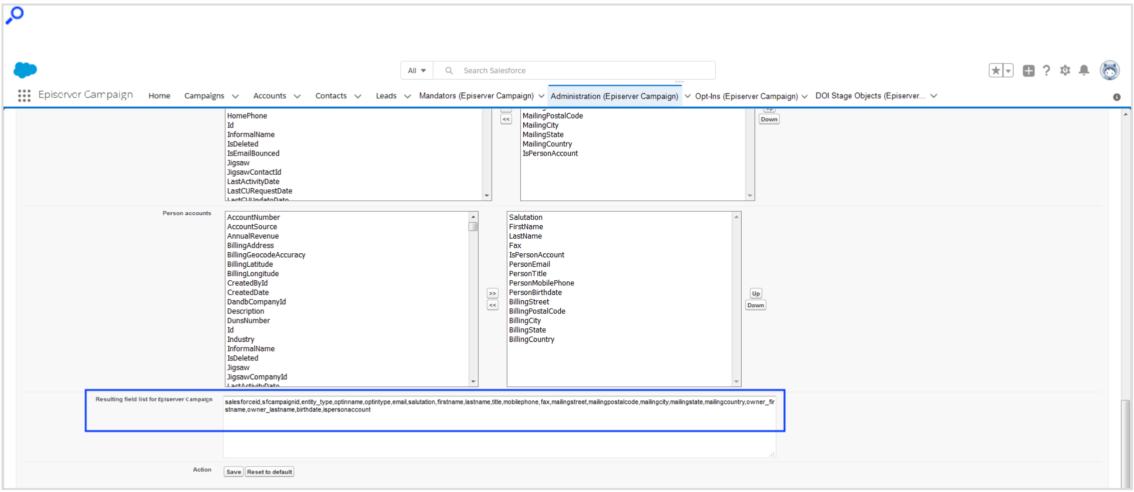
6. Optional: Select a data field and click **Up** or **Down** to change the order in which the data fields are transferred.



7. Click **Save**.



Under **Resulting field list for Episerver Campaign**, the list of data fields that are to be transferred are expanded by the newly-added data fields. If you want to discard your changes and return to the default settings, click **Reset to default**.



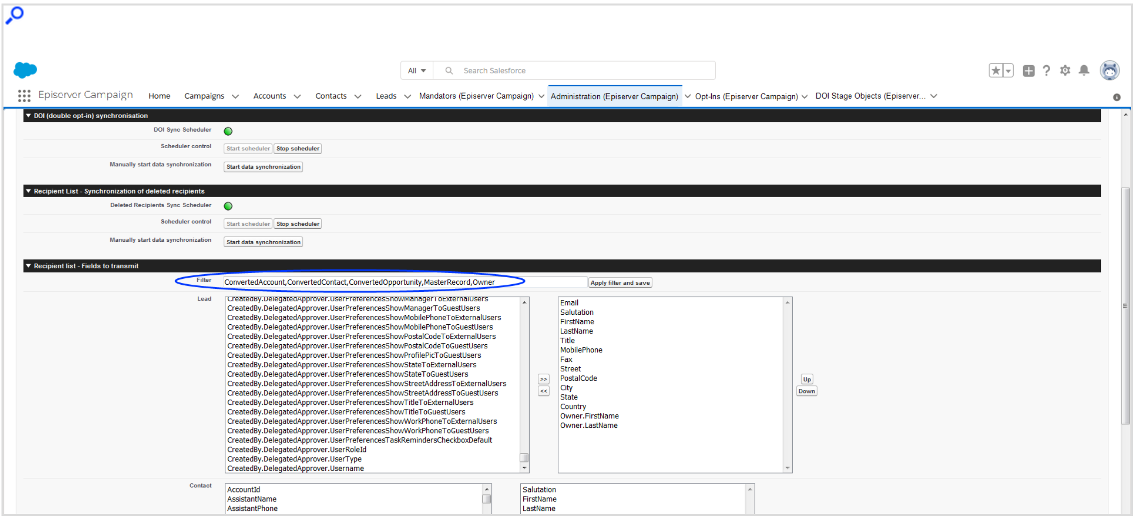
Tip: Keep this window open, as it is needed when Requesting additional fields to be added to recipient lists.

Since all Salesforce objects cannot be displayed in the **Lead**, **Contact** and **Personal Accounts** lists at the same time, you can use a filter to hide data fields or data field groups to display other Salesforce objects. If data fields that you want to transfer are missing from the list, you can hide the data field group **Owner**:

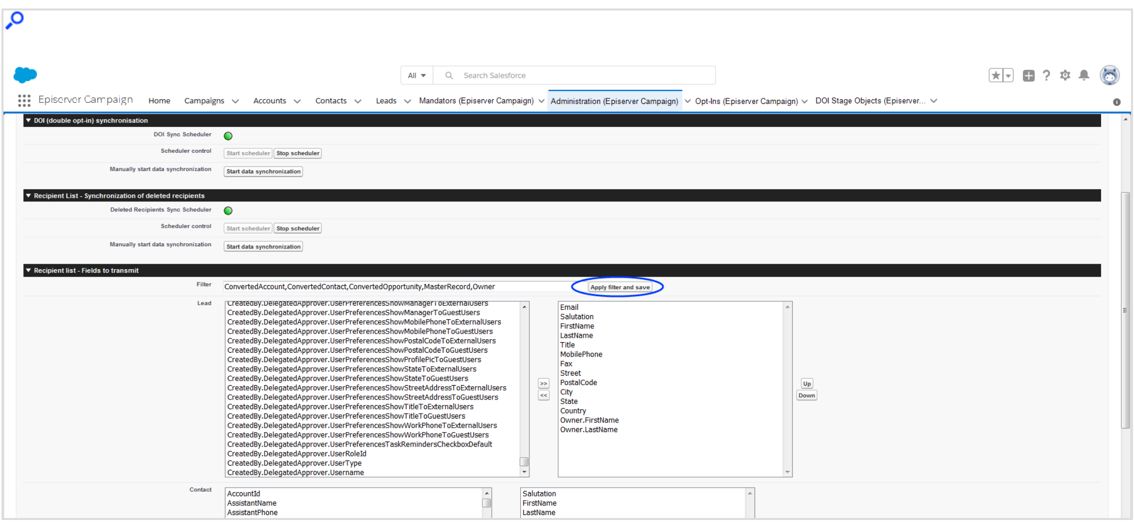
1. Be sure to save all changes to the data fields to be transferred.

Warning: When you edit and apply the filter, unsaved changes to the data fields are lost. Save any changes prior to editing the filter.

2. In the **Filter** field, add the entry **Owner**, separated by a comma; do not use spaces.



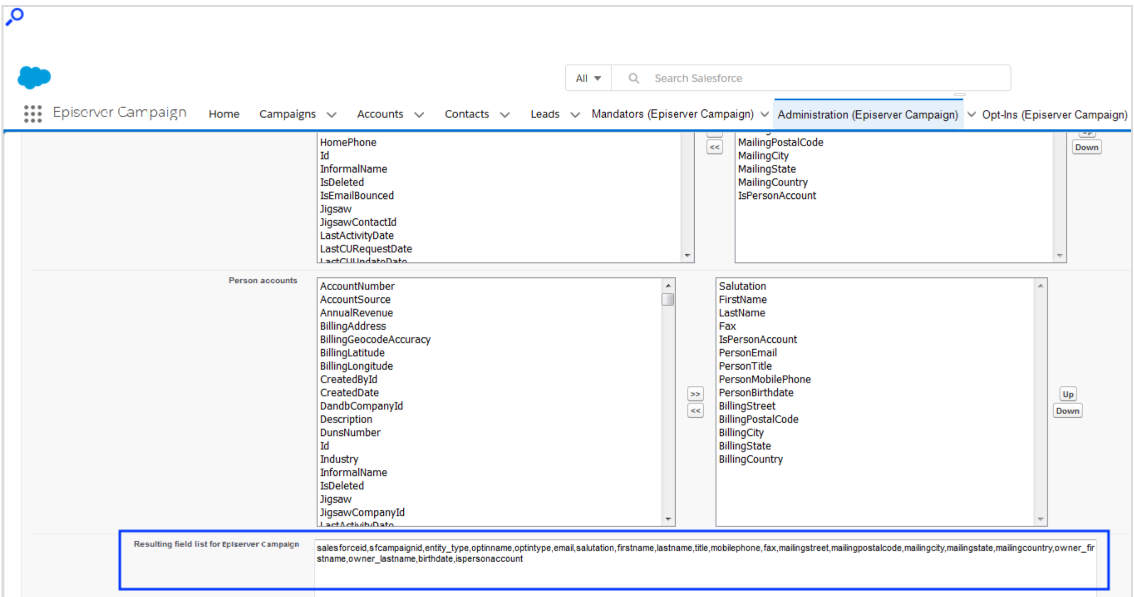
3. Click **Apply filter and save**. Data fields that start with **Owner** are now hidden and previously invisible Salesforce objects are displayed.



4. Locate the desired field and add it to the data fields to be transferred using the arrow button **>>**.

Requesting additional fields to be added to recipient lists

1. Under **Resulting field list for Episerver Campaign**, highlight the entire, comma-separated list of data fields to be transferred.



2. Copy the highlighted list to the clipboard.
3. Insert the copied list into the message text of an email and send to customer support.
4. When you receive the confirmation email, click **Start scheduler** in the **Administration (Episerver Campaign)** tab to enable automatically data synchronization.

Once data exchange is enabled, the additional data fields are automatically transferred to Optimizely Campaign. You can use the corresponding Salesforce objects to personalize your mailings via field functions.

Sending campaign mailings

> **Note:** This topic is for administrators and developers with administration access rights in Salesforce.

This topic describes how to send mailings via Optimizely Campaign from your Salesforce CRM. After the mailing is sent, response data (openings, clicks, direct replies, unsubscriptions and outbounces) are automatically imported into Salesforce from Optimizely Campaign.

> **Note:** Response data can not be transferred for campaigns initiated directly in Optimizely Campaign or the activities of Marketing Automation.

These are the steps to send a mailing:

1. Prepare a Smart Campaign with at least one mailing in Optimizely Campaign.
2. Create a CRM campaign in Salesforce and add members.
3. Start the dispatch of the Optimizely Campaign mailing in Salesforce.

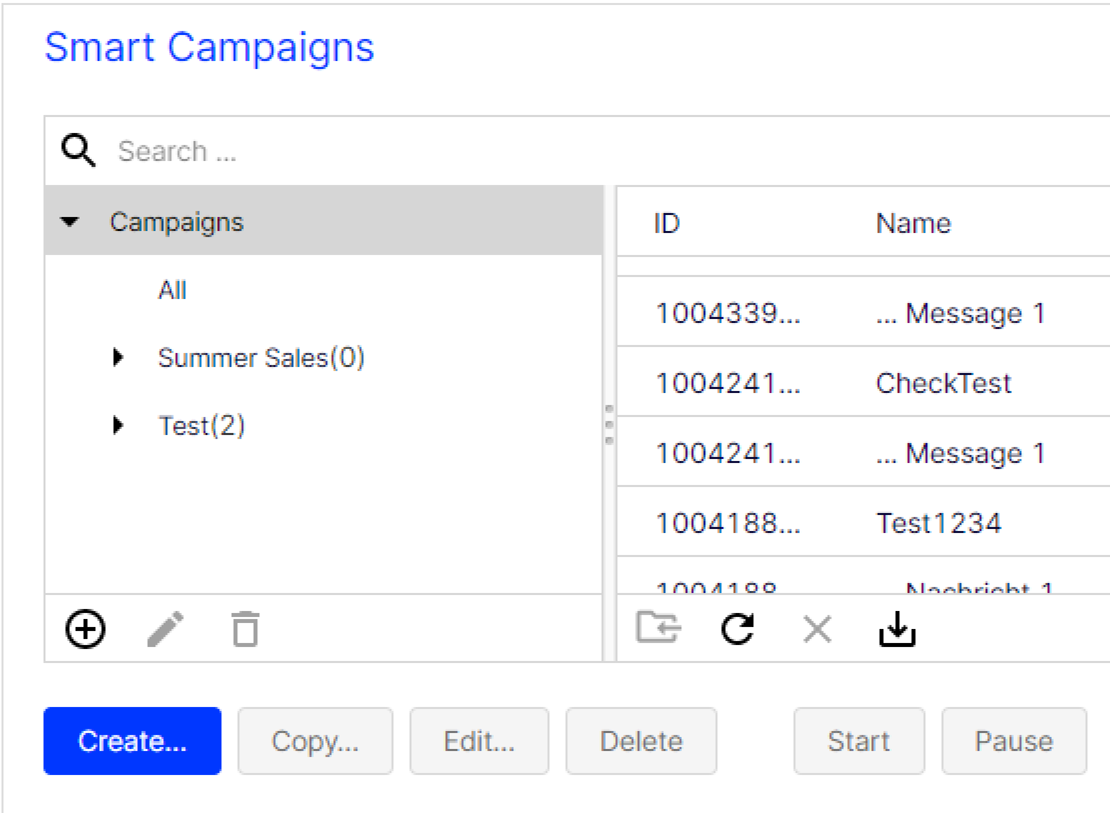
Preparing a Smart Campaign in Optimizely Campaign

The Smart Campaign set up requires at least these nodes:

- **Recipients** node, to which you assign the **Master recipient list** of the closed-loop interface. This is set up by the Optimizely customer support, when your client is configured.
- **Wait** node, to enable the **Wait until import has been finished** option.
- Message node, containing the mailing to be sent.

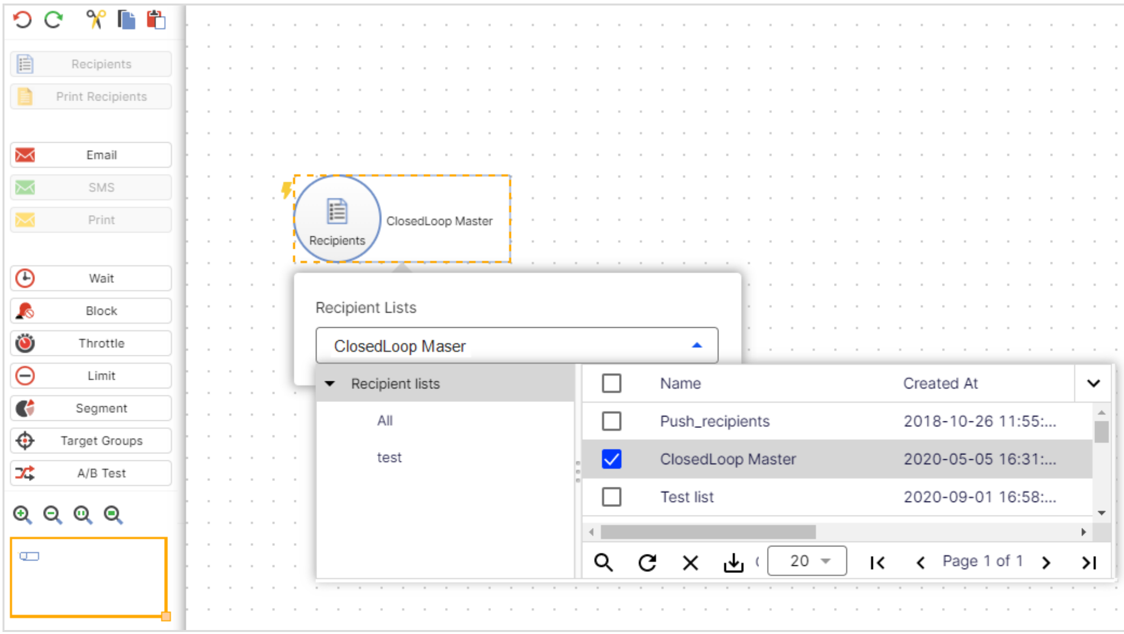
To configure a Smart Campaign, do the following:

1. Open the Optimizely Campaign menu and select **Campaigns** > **Smart Campaigns**.
2. In the **Campaigns** window, click **Create...**.

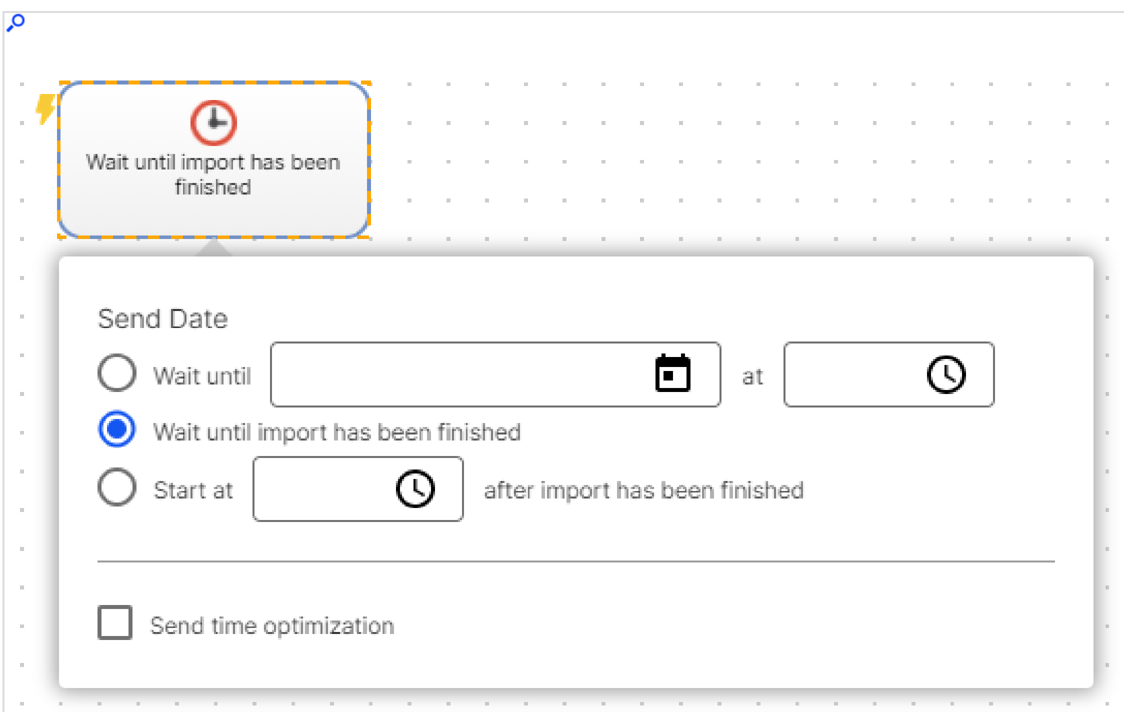


3. Drag the **Recipients** node from the left action area to the working area on the right.
4. Select the master recipient list in the **Recipient lists** drop-down list of the context menu.

> **Note:** Only use the master recipient list and no other recipient list.



5. Drag the **Wait** node from the left action area to the working area on the right.
6. In the context menu, enable the option **Wait until import has been finished**.



7. Drag a message node (Email, SMS) from the left action area to the working area on the right.
8. Click **Edit Content...**, select a template and insert your message content into the mailing. Design your Smart Campaigns mailing as usual, using available tools and features. See Edit mailing content.
9. Click **Close**.
10. Connect the campaign nodes.
11. Click **Save and Close**, enter a campaign name and click **Save**.

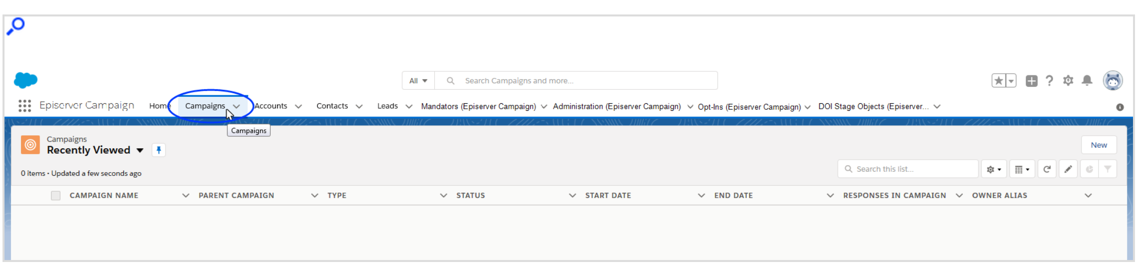
> **Note:** Do not activate and send the campaign mailing. If you do, you cannot start and send it from Salesforce anymore. If you start and send the mailing from Salesforce later, the mailing is automatically duplicated. You can delete the original in Optimizely Campaign after it is sent.

Creating a CRM campaign and adding members

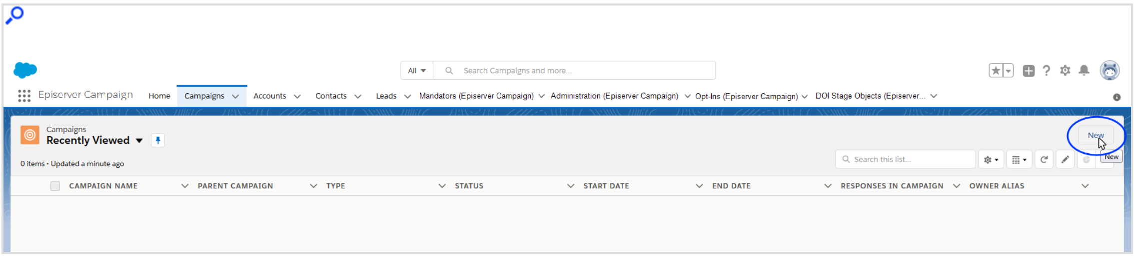
The CRM campaign in Salesforce controls the Smart Campaign created in Optimizely Campaign. With the CRM campaign, you trigger the mailing dispatch in Optimizely Campaign and transfer the selected contacts and leads (members of the CRM campaign) into the Optimizely Campaign recipient list.

Use the regular features in Salesforce to create a CRM campaign and assign members. The following steps shows an example of how to do this.

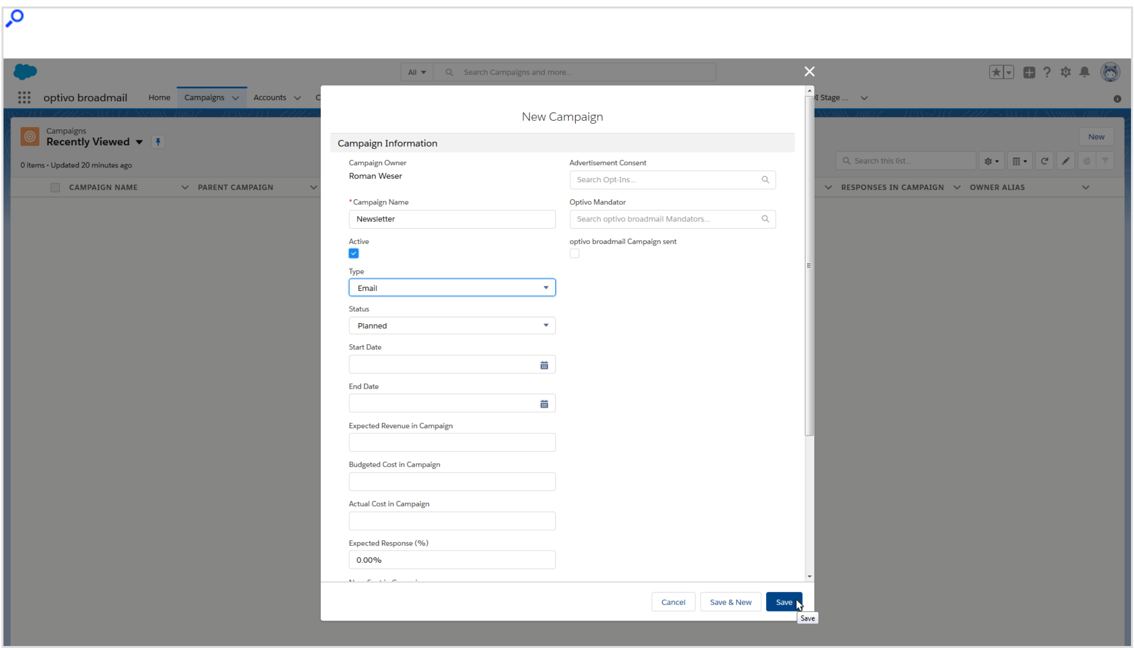
1. Log in to Salesforce CRM.
2. Click **Campaigns**.



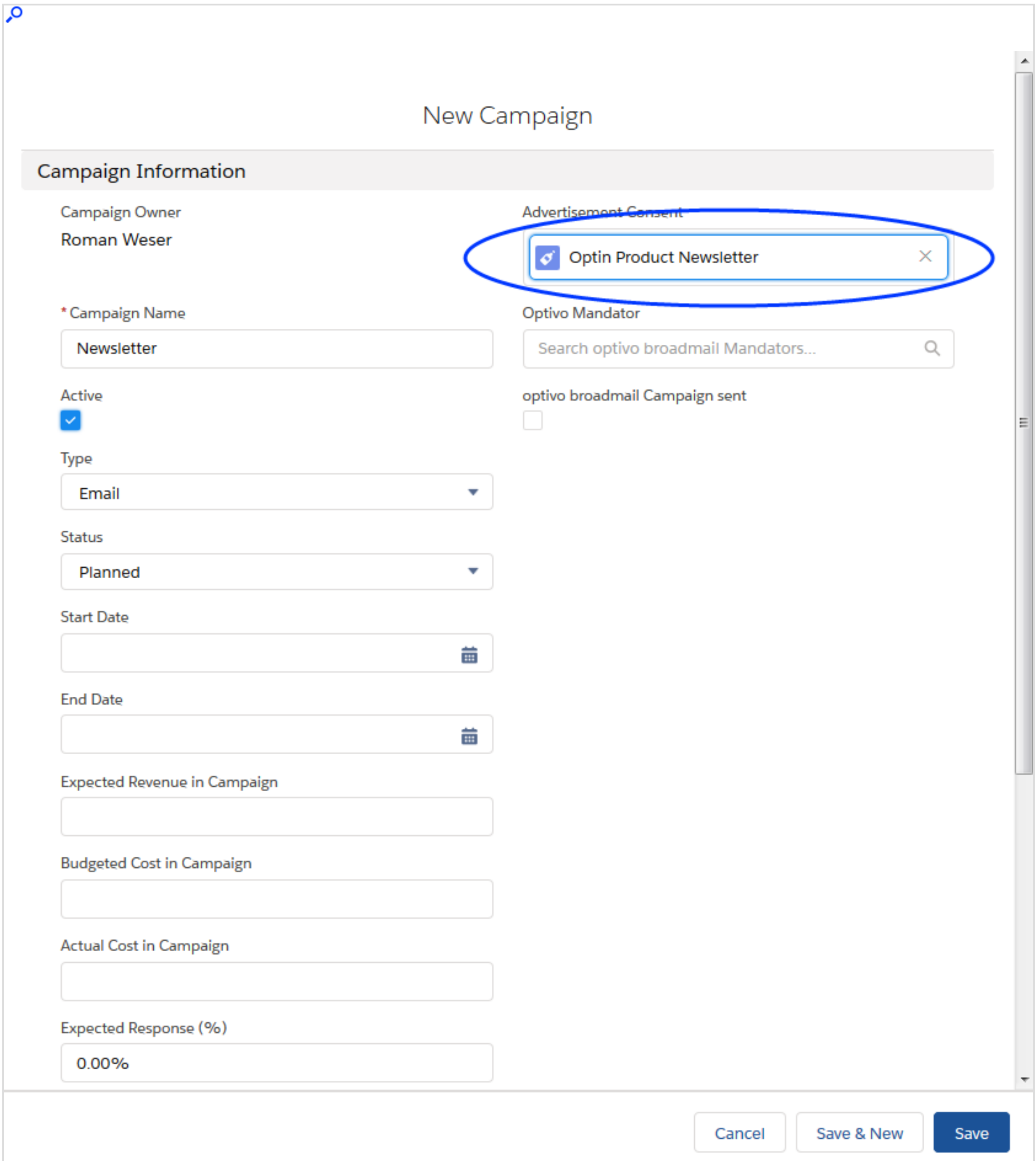
3. Click **New**.



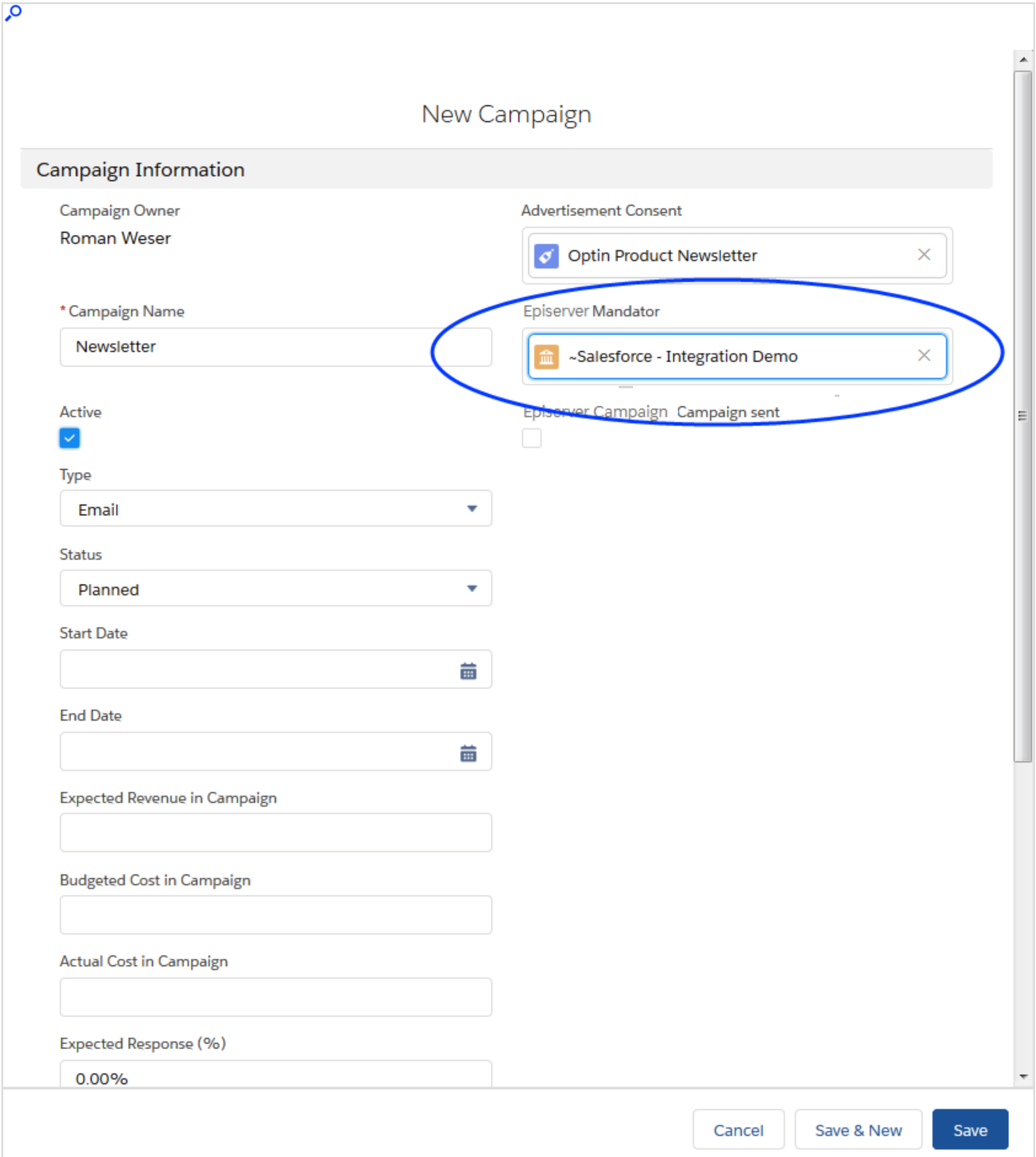
4. Enter the desired campaign information and description.



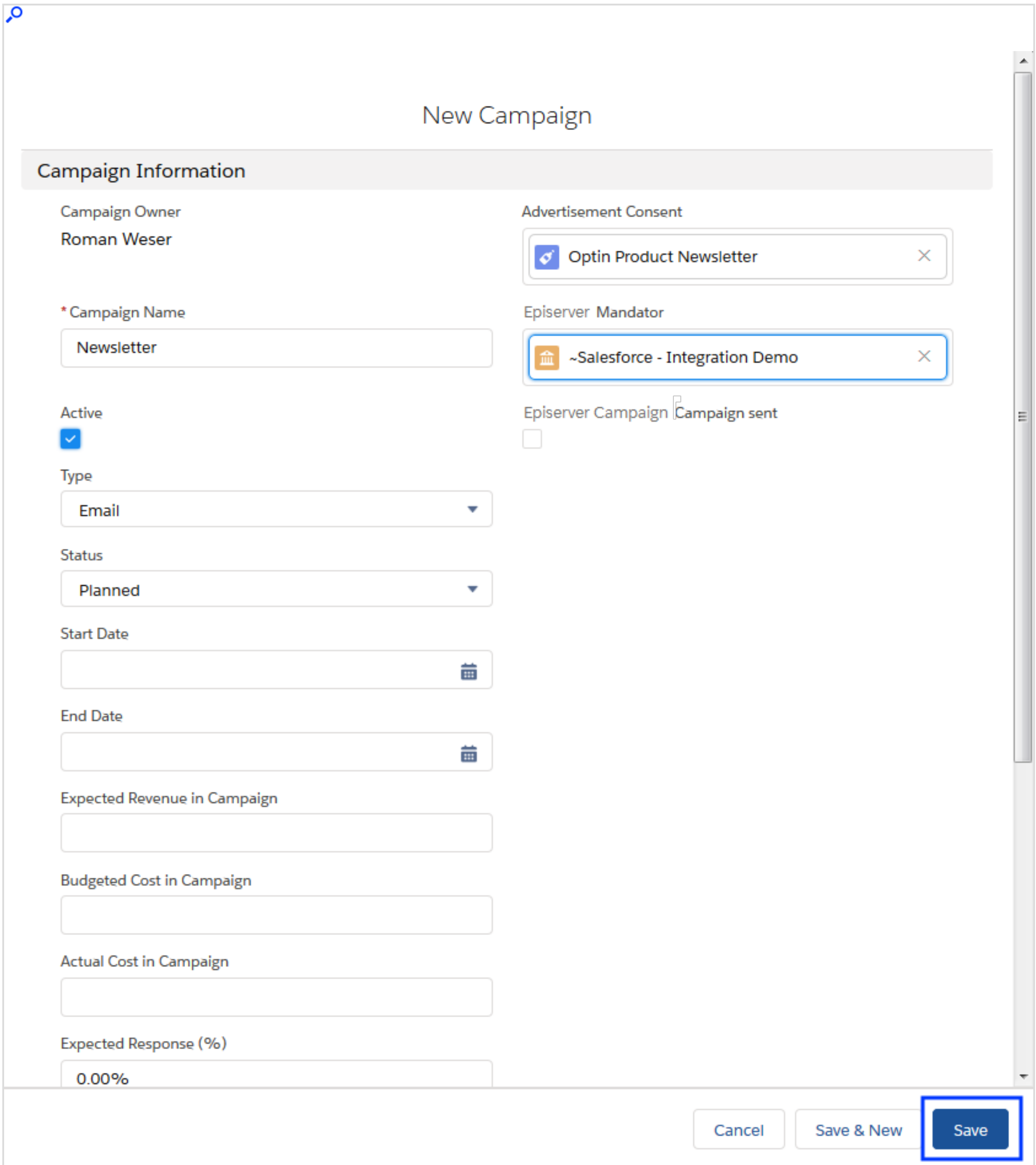
5. In the **Advertisement Consent** field, enter the advertising permission that you want to assign to the campaign.



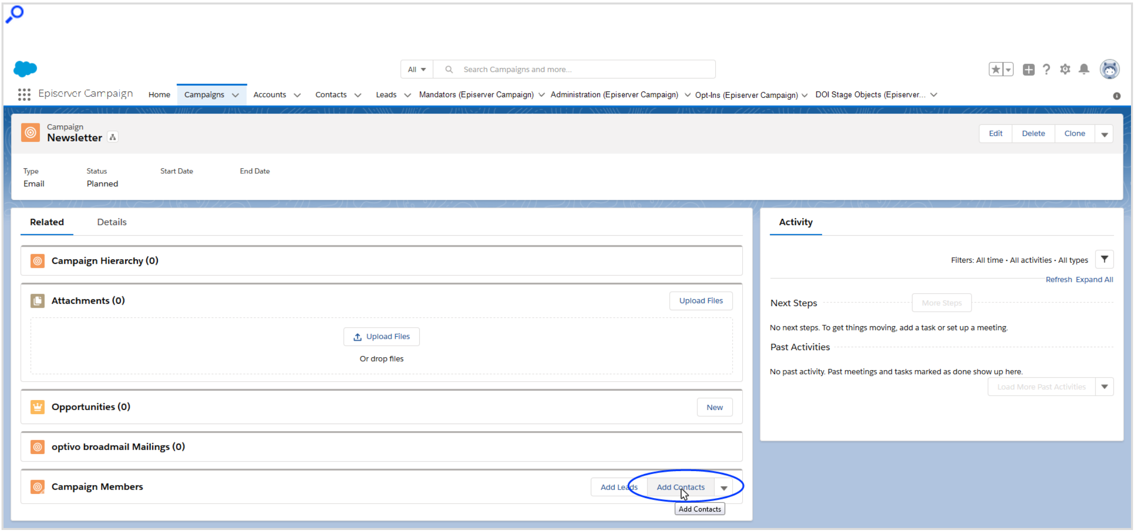
6. In the **Episerver Mandator** field, select the client in which you have prepared the mailing that is to be sent. (In the example, the client's name is *Episerver Campaign*).


New Campaign
Campaign Information
Campaign Owner
Roman Weser
Advertisement Consent
Optin Product Newsletter
* Campaign Name
Newsletter
Episerver Mandator
~Salesforce - Integration Demo
Active
Episerver Campaign Campaign sent
Type
Email
Status
Planned
Start Date
End Date
Expected Revenue in Campaign
Budgeted Cost in Campaign
Actual Cost in Campaign
Expected Response (%)
0.00%
Cancel
Save & New
Save

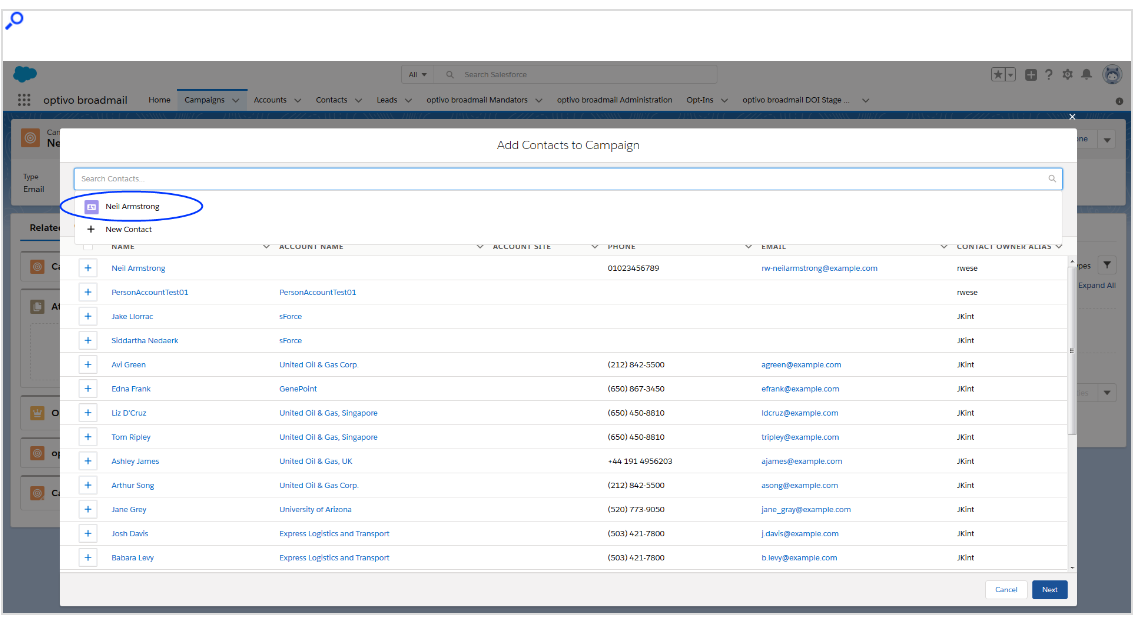
7. Click **Save**.



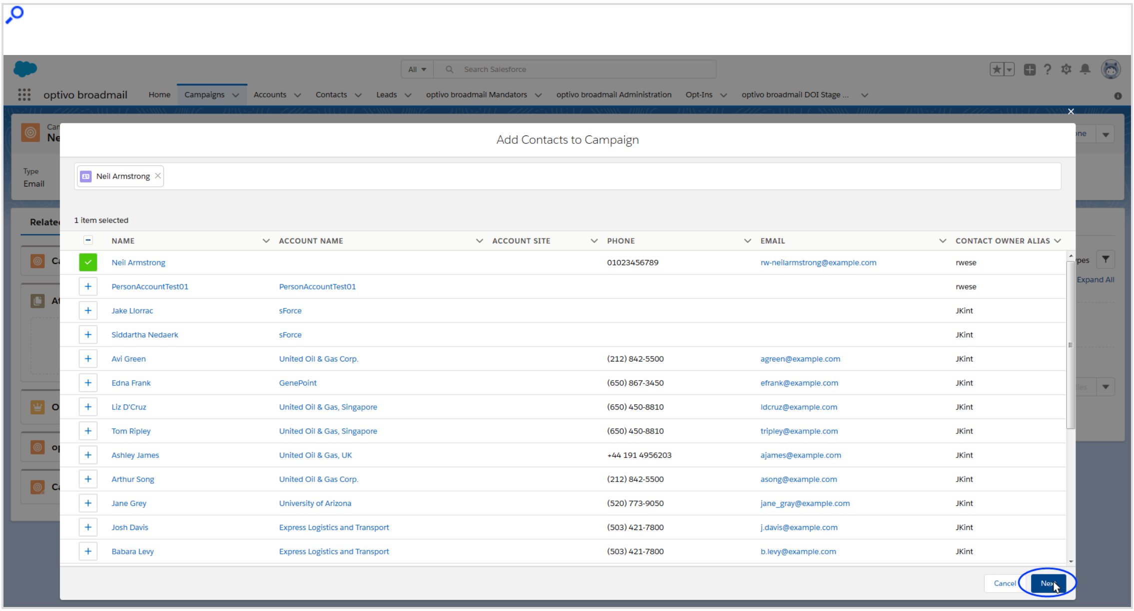
8. In the **Campaign Members** area, click **Add Contacts** or **Add Leads** or **Add Person Accounts**.



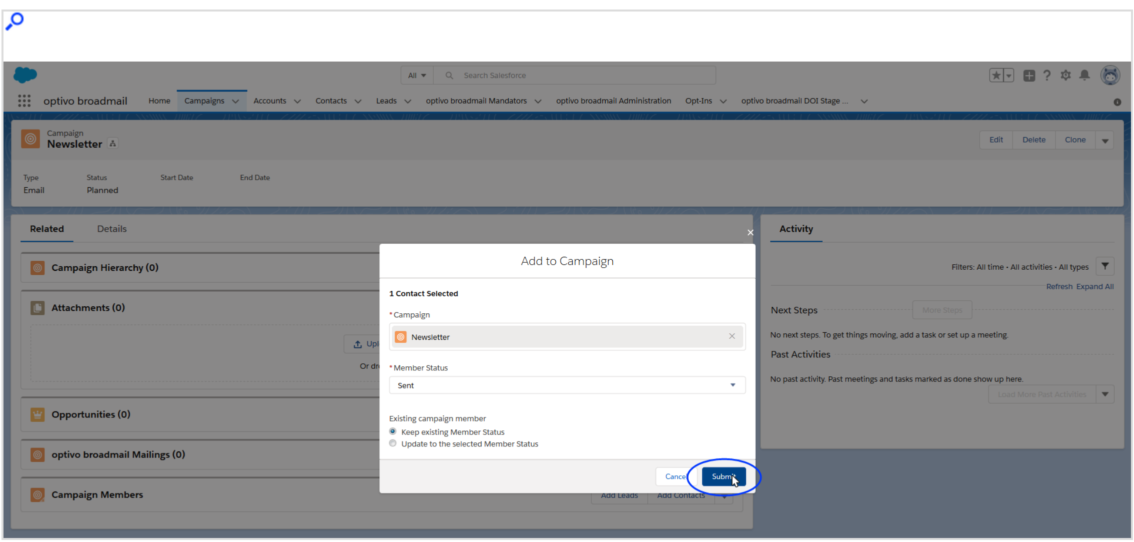
9. Select the contacts or leads or personal accounts that you want to add to the campaign.



10. Click **Next**.



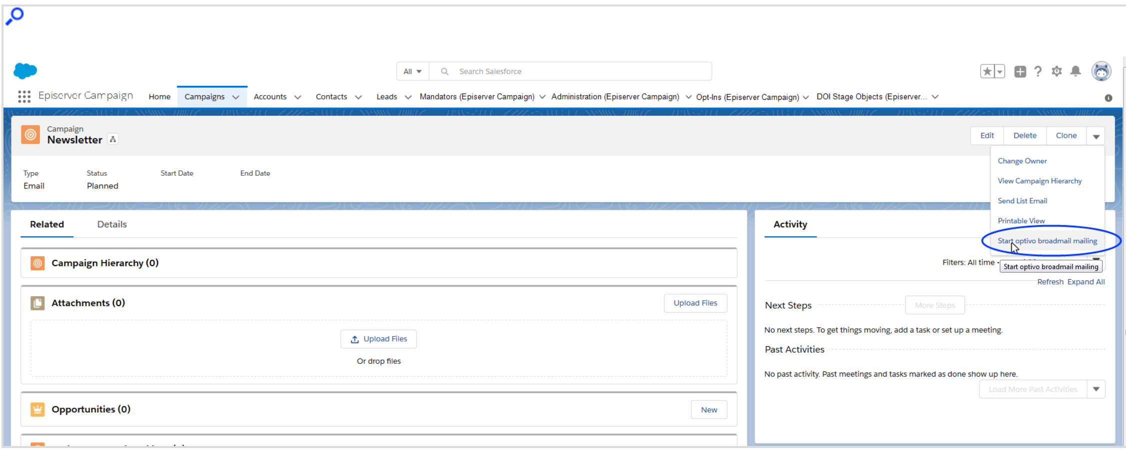
11. Click **Submit**.



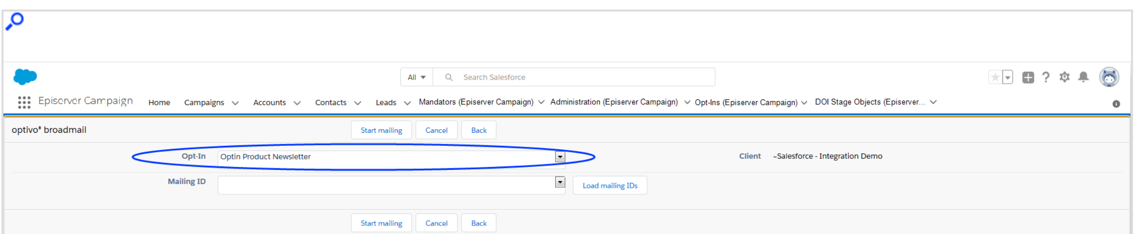
The **<Your campaign name> Campaign** window opens again. Keep this window open as it is needed in the next step: **Starting the mailing dispatch in Salesforce**.

Starting the mailing dispatch in Salesforce

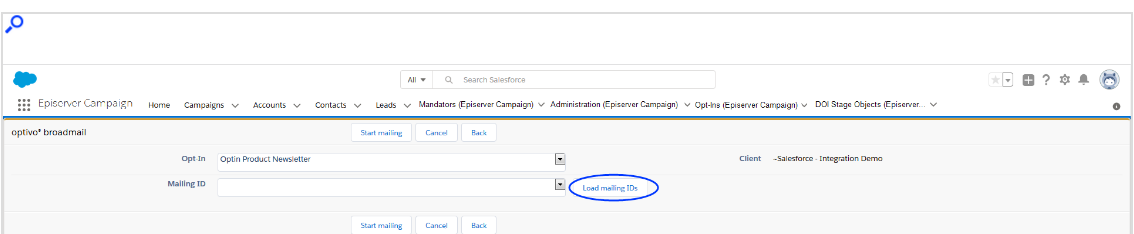
1. In the **<Your campaign name> Campaign** window, click the downward-pointing triangle on the upper right side and select the **Start mailing** option.



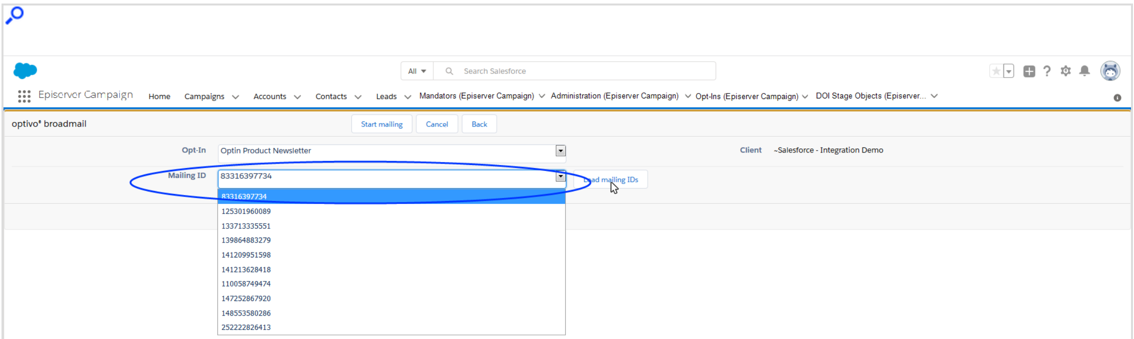
2. In the **Episerver Campaign** window, check under **Opt-In** that the correct advertising permission has been selected. Use the drop-down list to change the advertising permission if necessary.



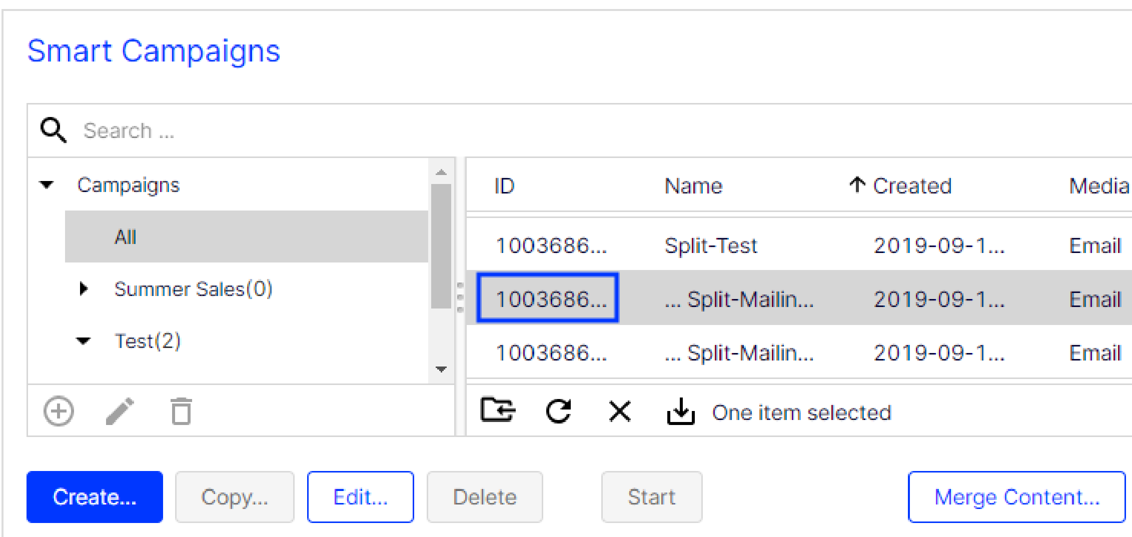
3. Click **Load mailing IDs**.



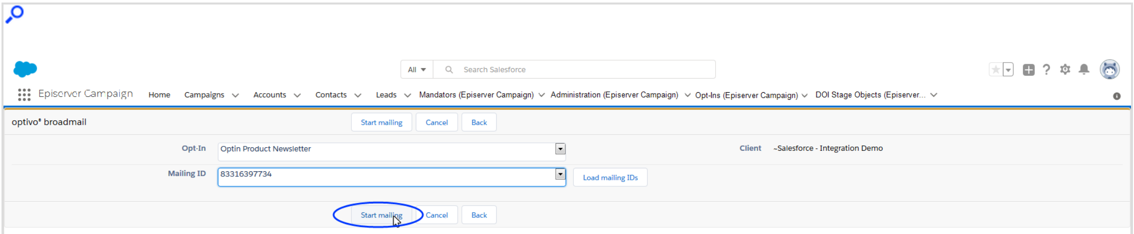
The **Mailing ID** drop-down list loads the mailing ID of the mailings you prepared. For multiple mailings, the IDs for these are loaded.



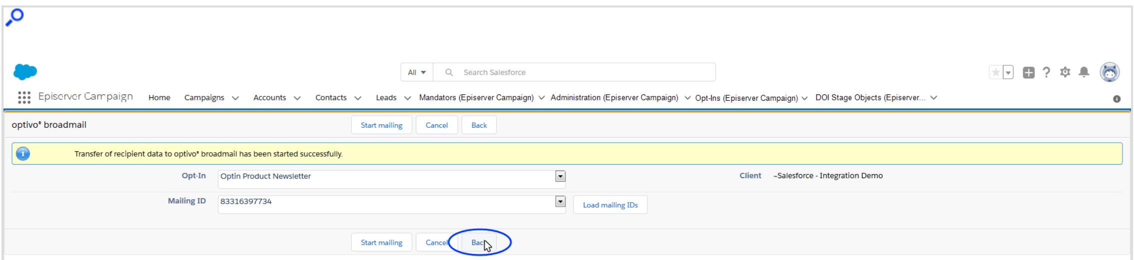
4. For multiple mailings, select the ID for the desired mailing from the **Mailing ID** drop-down list. To see the mailing IDs, open the Optimizely Campaign menu and select **Campaigns** > **Smart Campaigns**. Copy the relevant mailing ID from the **ID** column of the campaigns overview.



5. Click **Start mailing** (in Salesforce). The contacts/leads that you added to your CRM campaign as members are transferred to Optimizely Campaign.

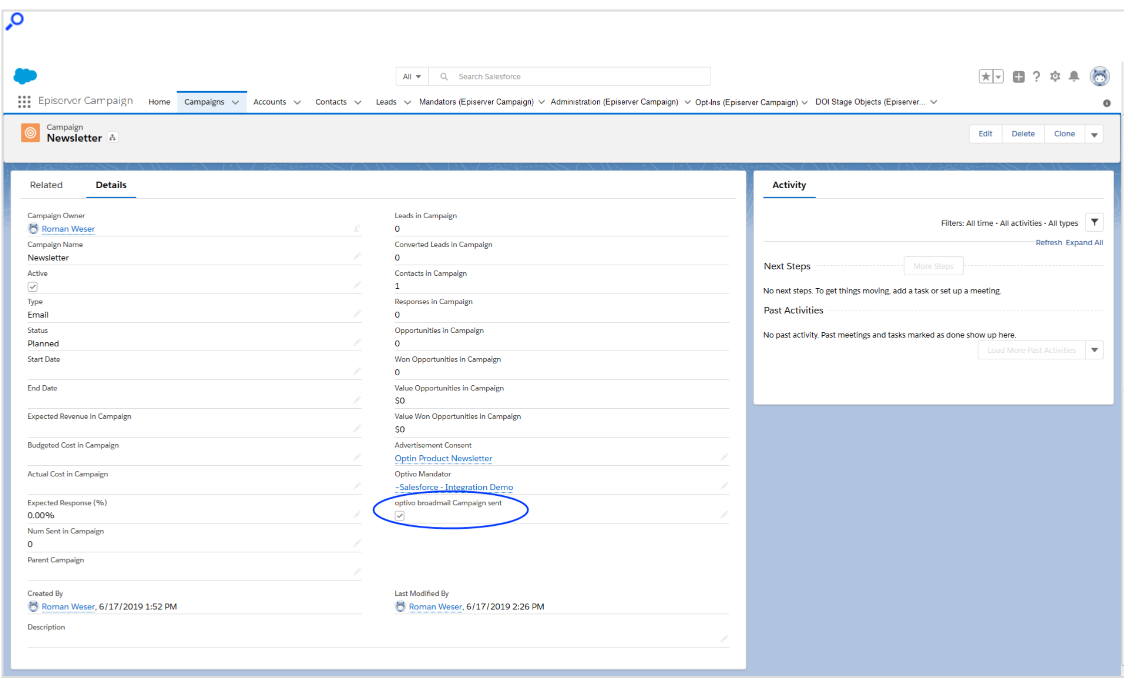


6. To check the current dispatch status for the mailing, click **Back**.



The **<Your campaign name> Campaign** window opens.

7. Check the sending status in the **Details** tab. A selected check box indicates that the mailing was sent successfully.



Copying data sets in recipient lists

> **Note:** This topic is for administrators and developers with administration access rights in Salesforce.

This topic describes how to copy and synchronize Salesforce data sets of contacts, leads, and personal accounts with your Optimizely Campaign recipient lists. For this purpose, the Salesforce add-on adds two Apex classes to the Salesforce Process Builder:

- **Upsert Recipient**. Updating recipients or adding new recipients.
- **Delete Recipient**. Deleting leads, contacts, and personal accounts from an Optimizely Campaign recipient list.

Requirements

Optimizely customer support must prepare your Optimizely Campaign recipient lists for the Salesforce synchronization. Provide information about the client in which you want to use recipient lists for the Salesforce synchronization.

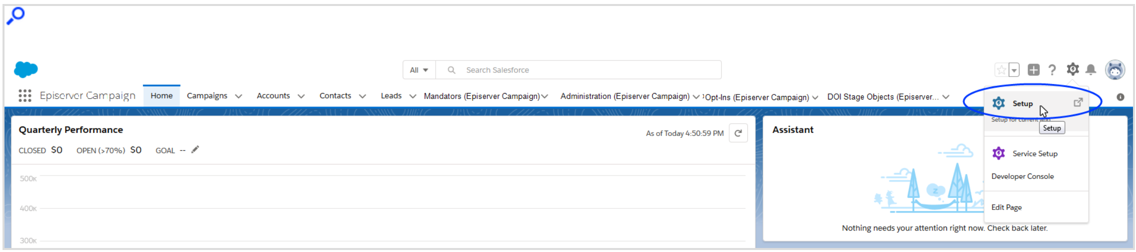
Generating processes and using Apex classes

Once customer support has prepared the desired recipient lists, set up processes in Salesforce to automatically copy contacts, leads, and personal accounts in Optimizely Campaign recipient lists. For example, you can set up processes that filter customers according to a certain status and transfer them to a corresponding recipient list, such as *new customers* in a recipient list that only contains new customers.

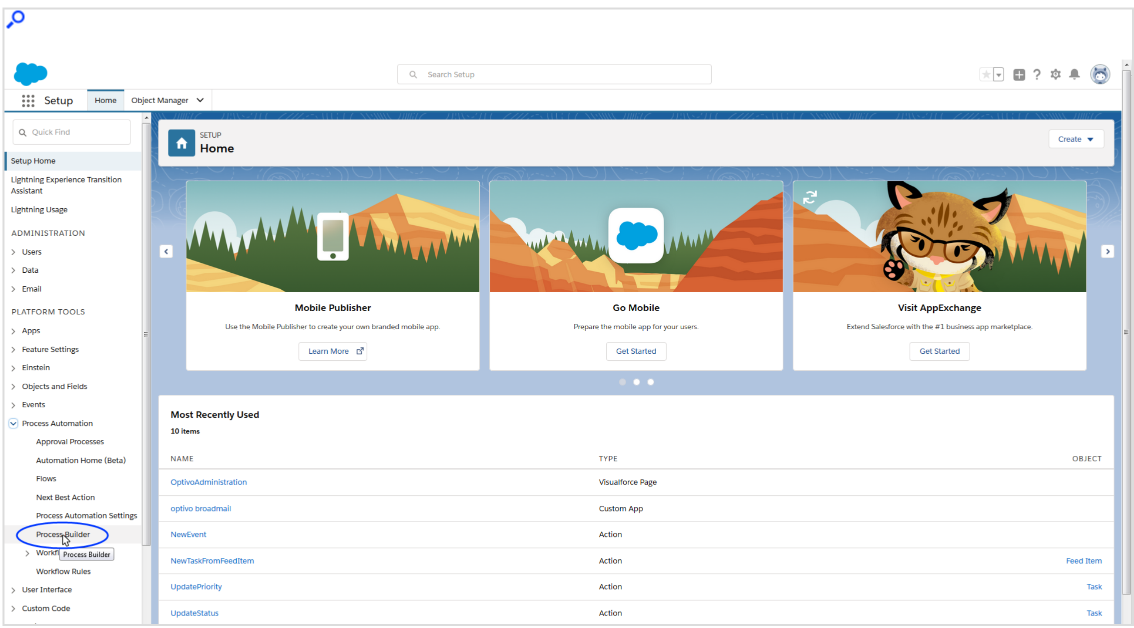
For contacts, leads, and personal accounts in this example, a Boolean reference field (true/-false) called **Premium Customer** was created first that you will need for configuring the process. See Creating reference fields.

Setting up processes

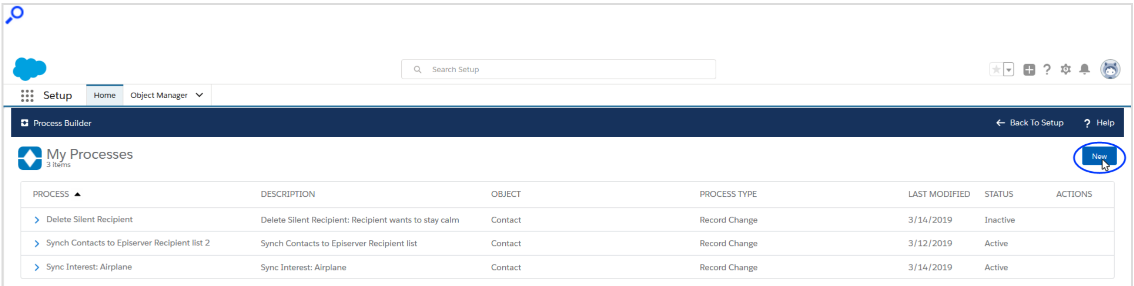
1. Go to the **Setup** area in Salesforce.



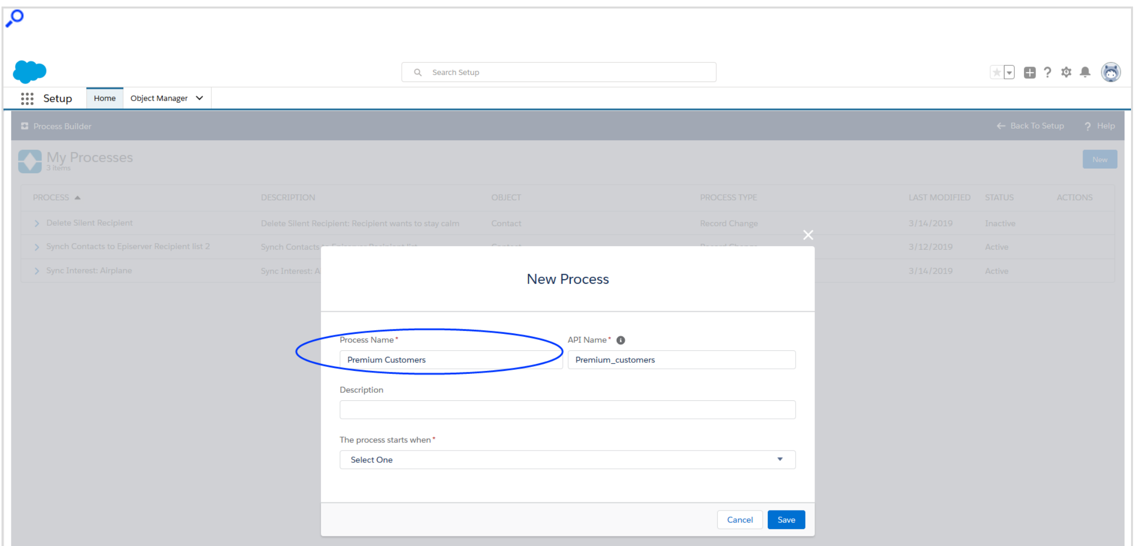
2. In the left menu bar, click **Process Automation** > **Process Builder**.



3. In the **My Processes** window, click **New**.

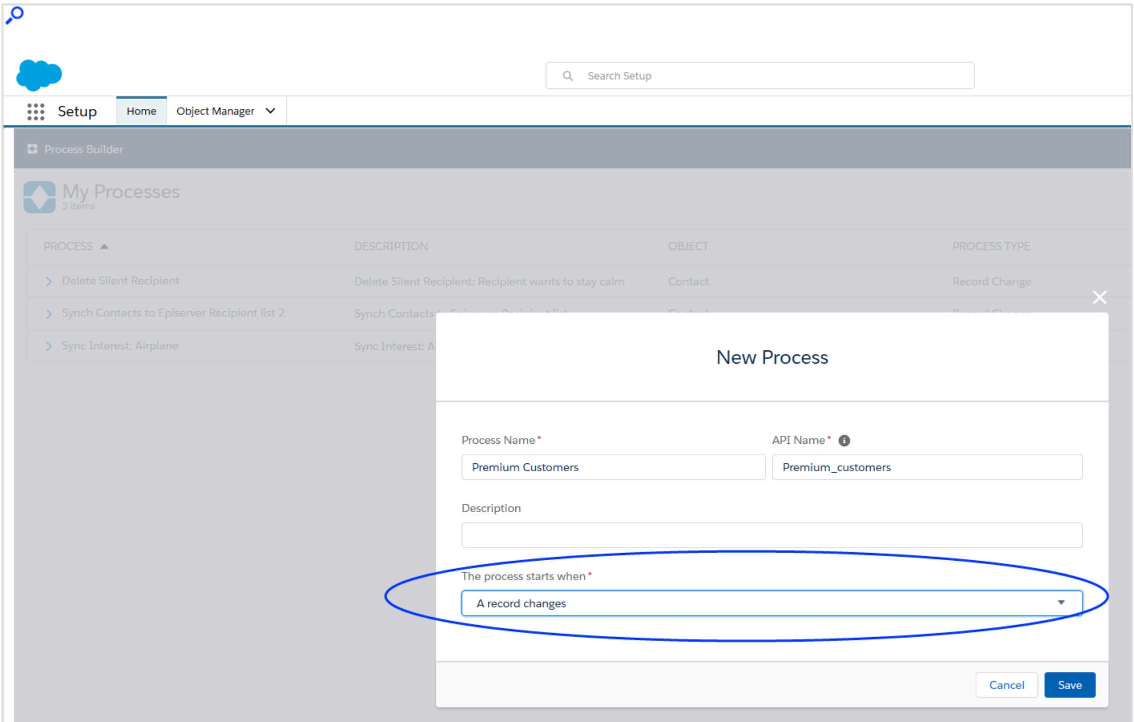


4. In the **Process Name** field, enter a name for the process, such as *Premium Customers*.



5. Enter a name under **API Name**, such as *Premium_Customers*.
6. Optional: Enter a description in the **Description** field.

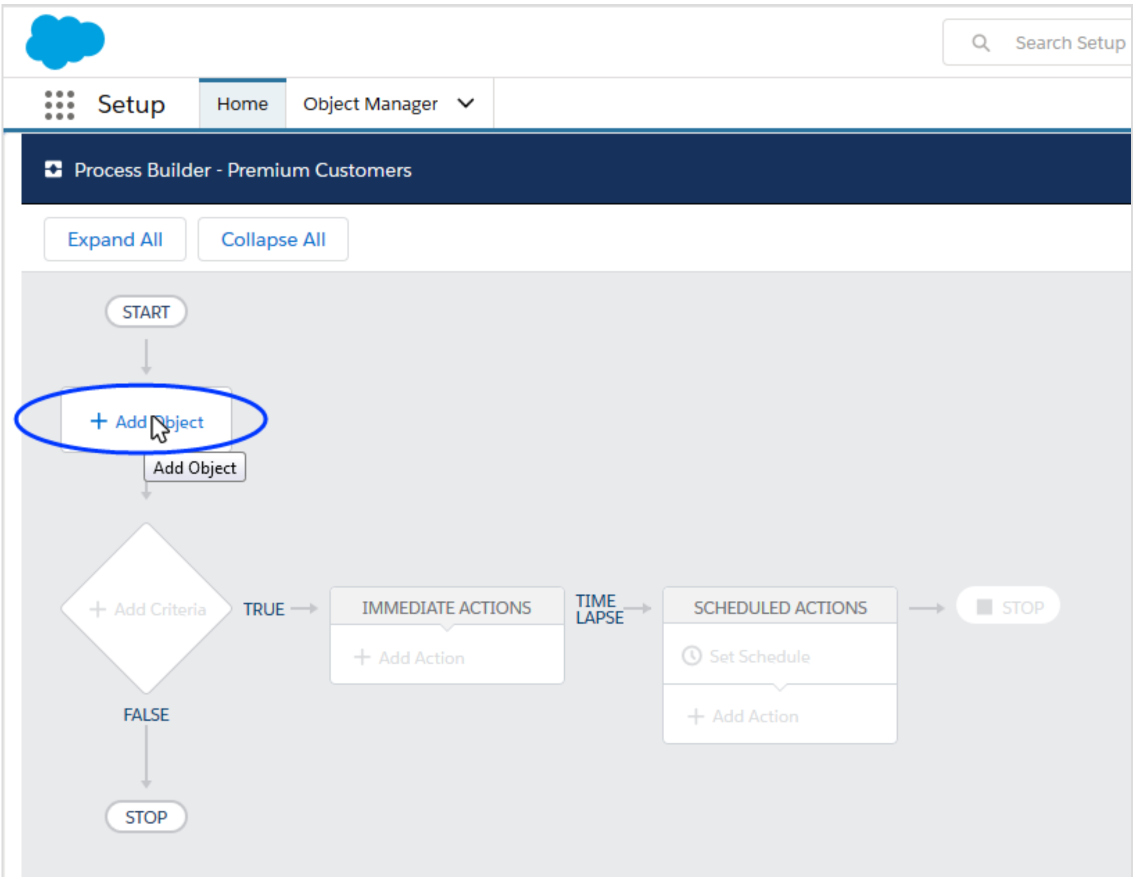
7. Select **A record changes** in the **The process starts when** drop-down list.



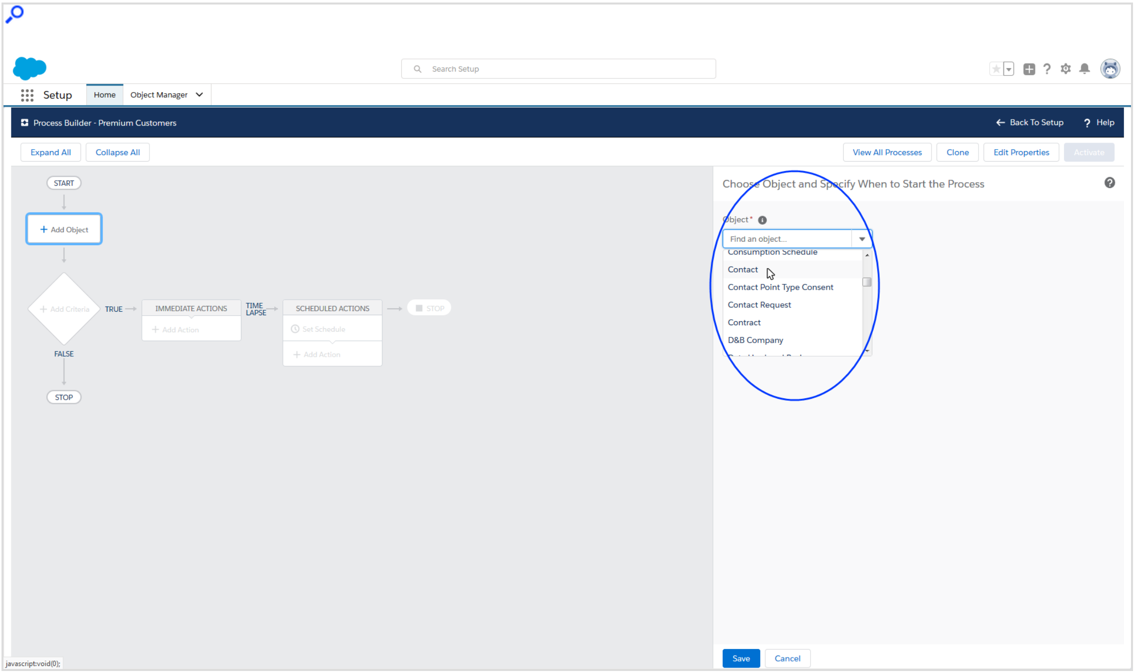
8. Click **Save**.

Adding criteria and defining Apex classes

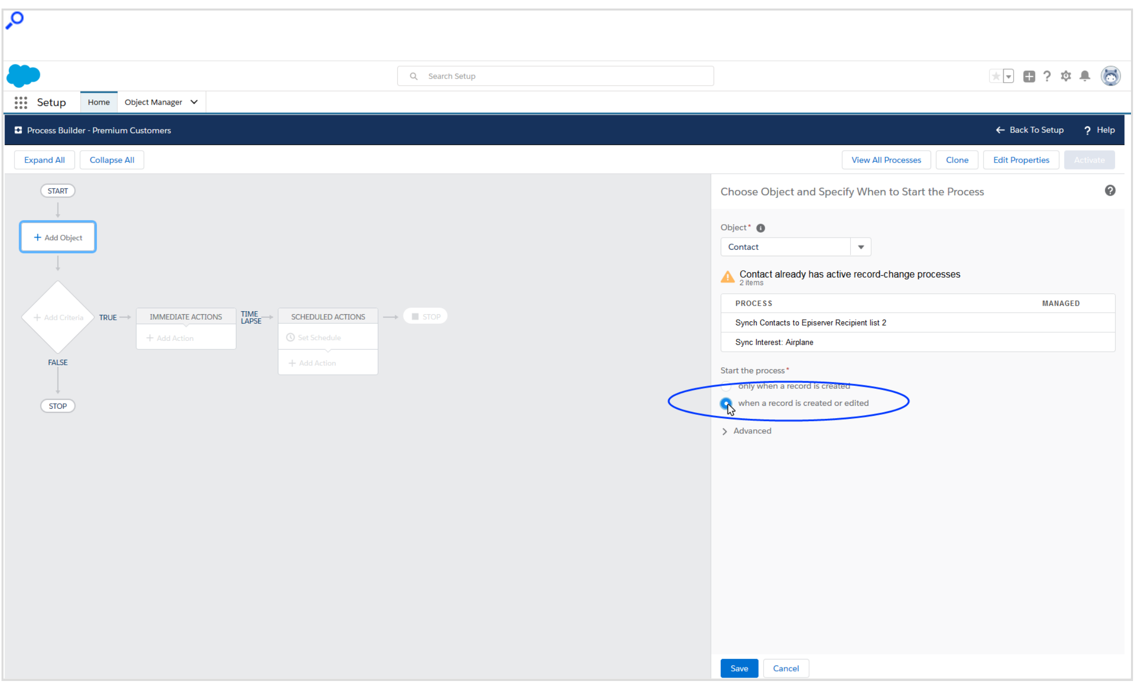
1. Click **Add object** in the flowchart.



2. In the **Choose Object and Specify When to Start the Process** window, select the entity in the **Object** drop-down list that you want to set up the process for: **Lead**, **Contact**, or **Person Account**.

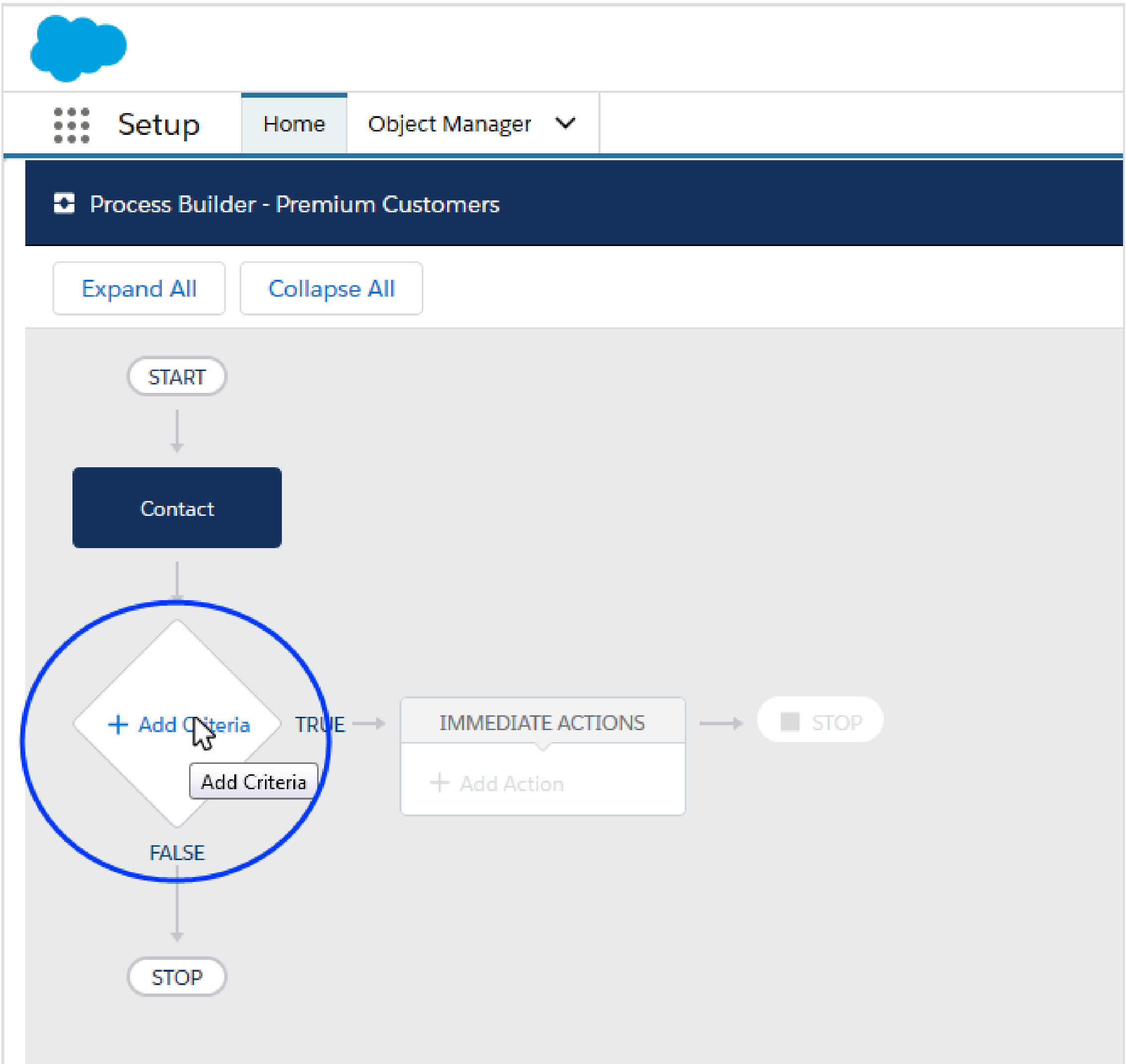


3. Under **Start the process**, enable **when a record is created or edited**.

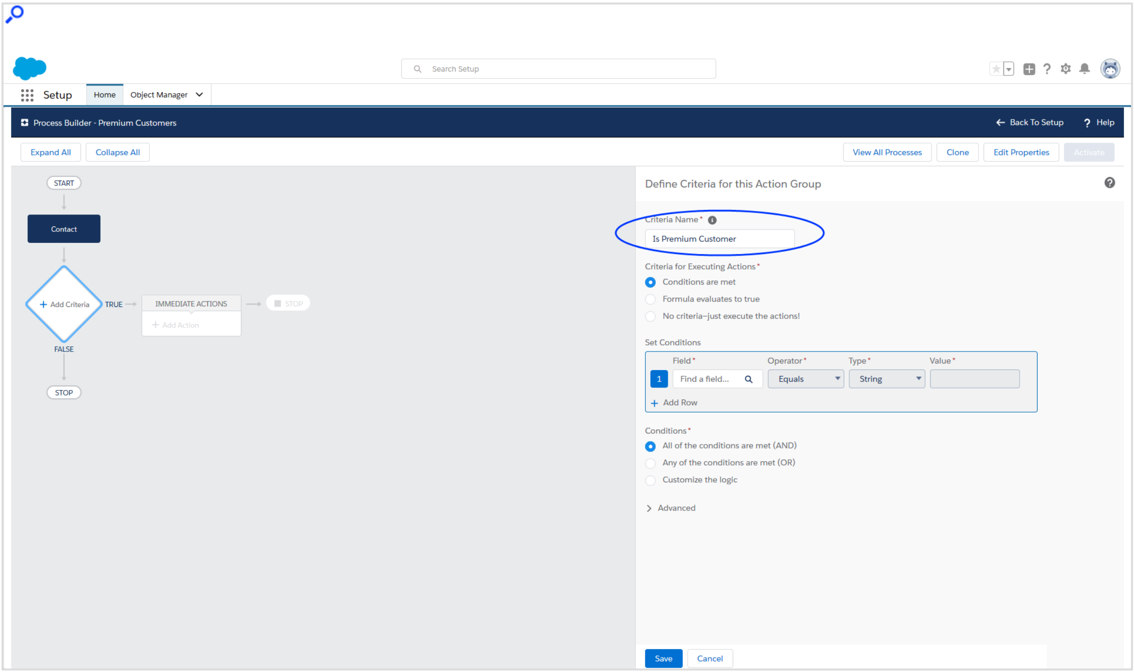


4. Click **Save**.

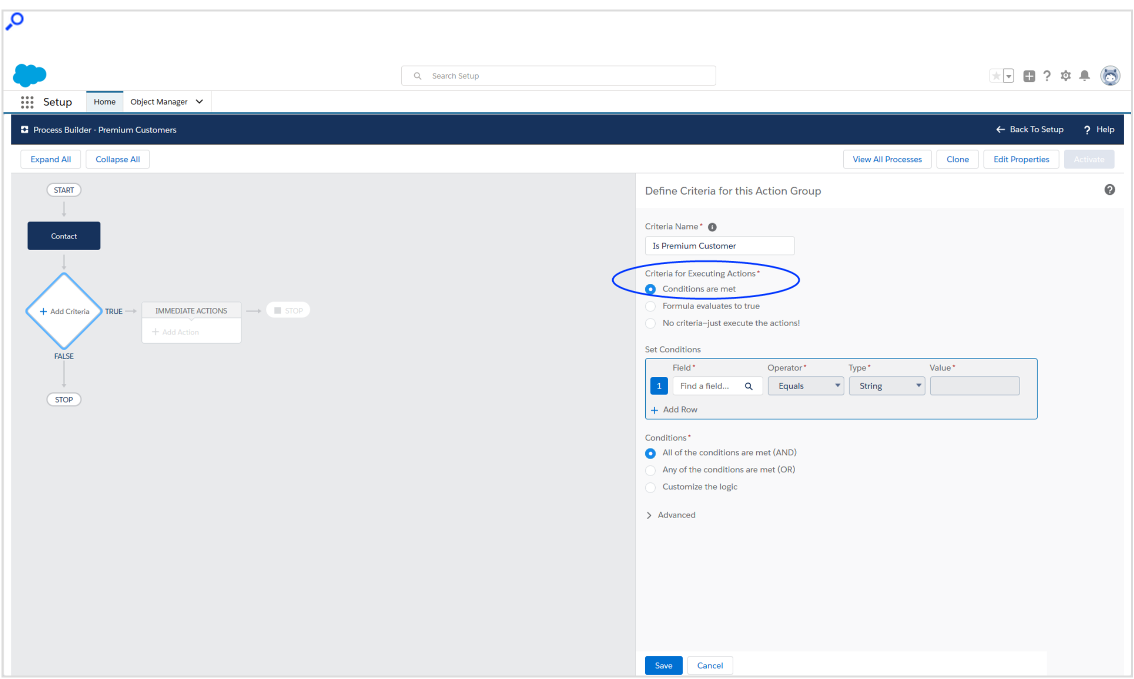
5. Click **+ Add criteria**.



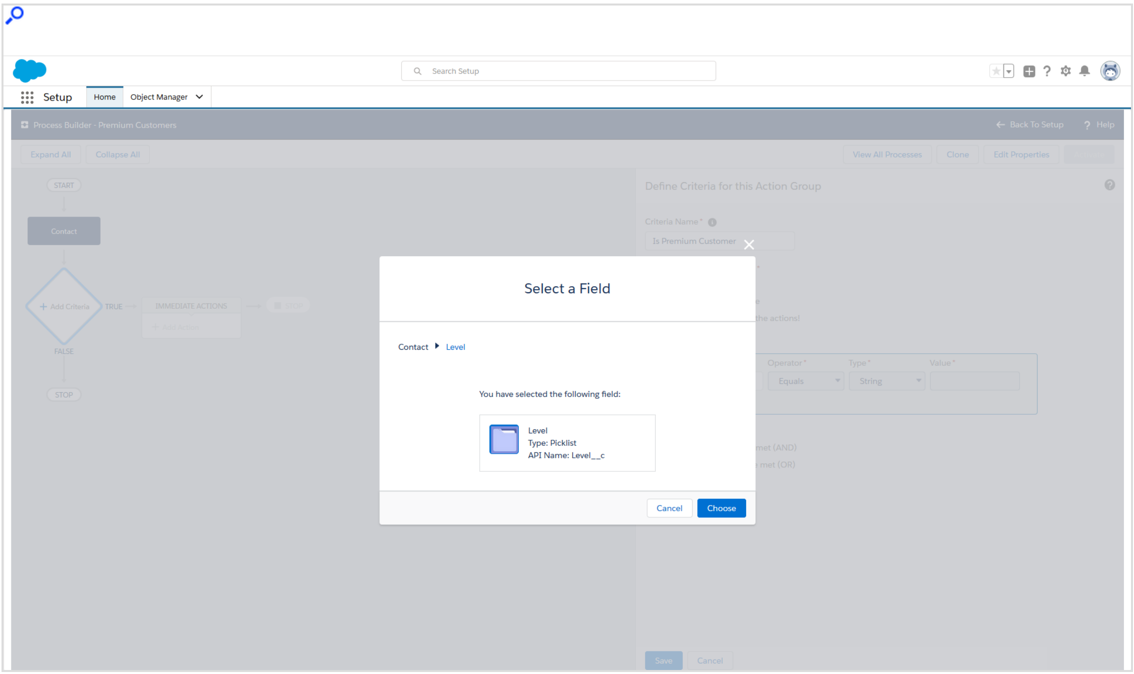
6. In the right window, enter a name for the criterion in the **Criteria Name** field, such as *Is Premium Customer*.



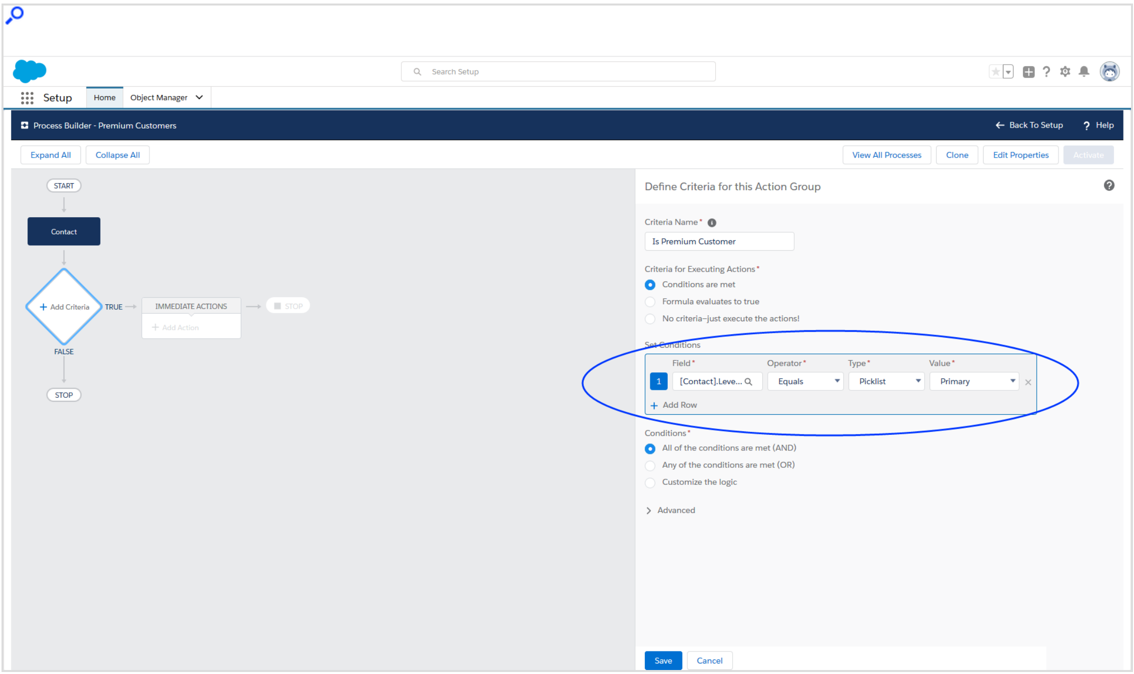
7. Under **Criteria for Executing Actions**, select **Conditions are met**.



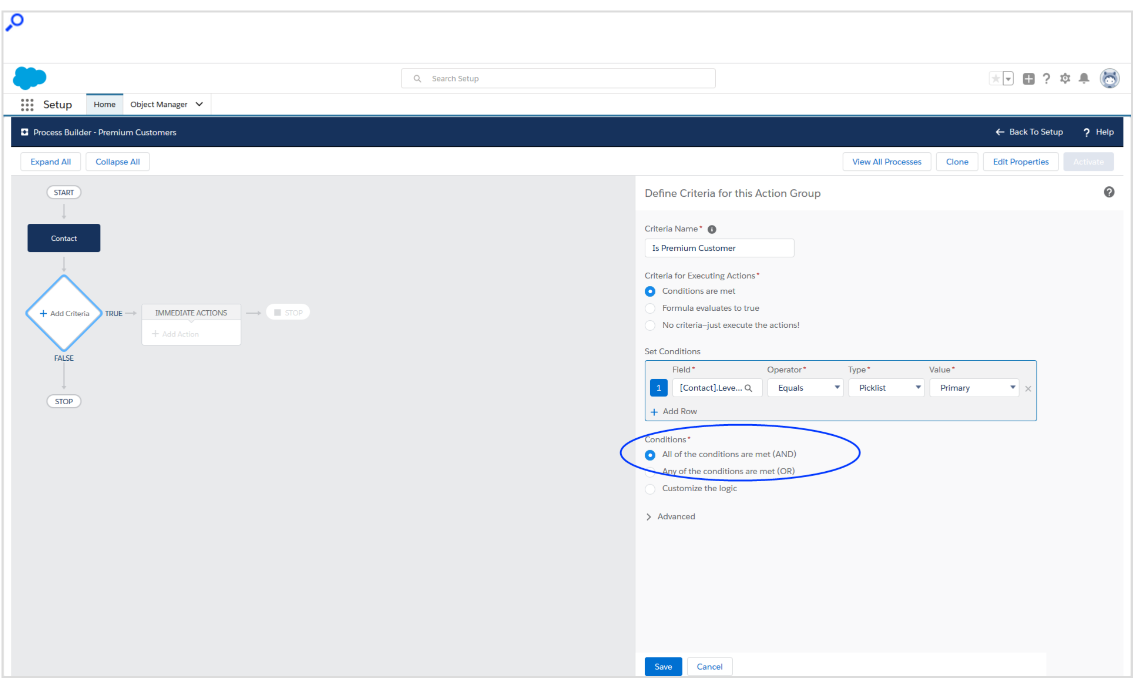
8. Under **Set conditions**, select the **Premium Customer** reference field from the drop-down list under **Field** and confirm your selection.



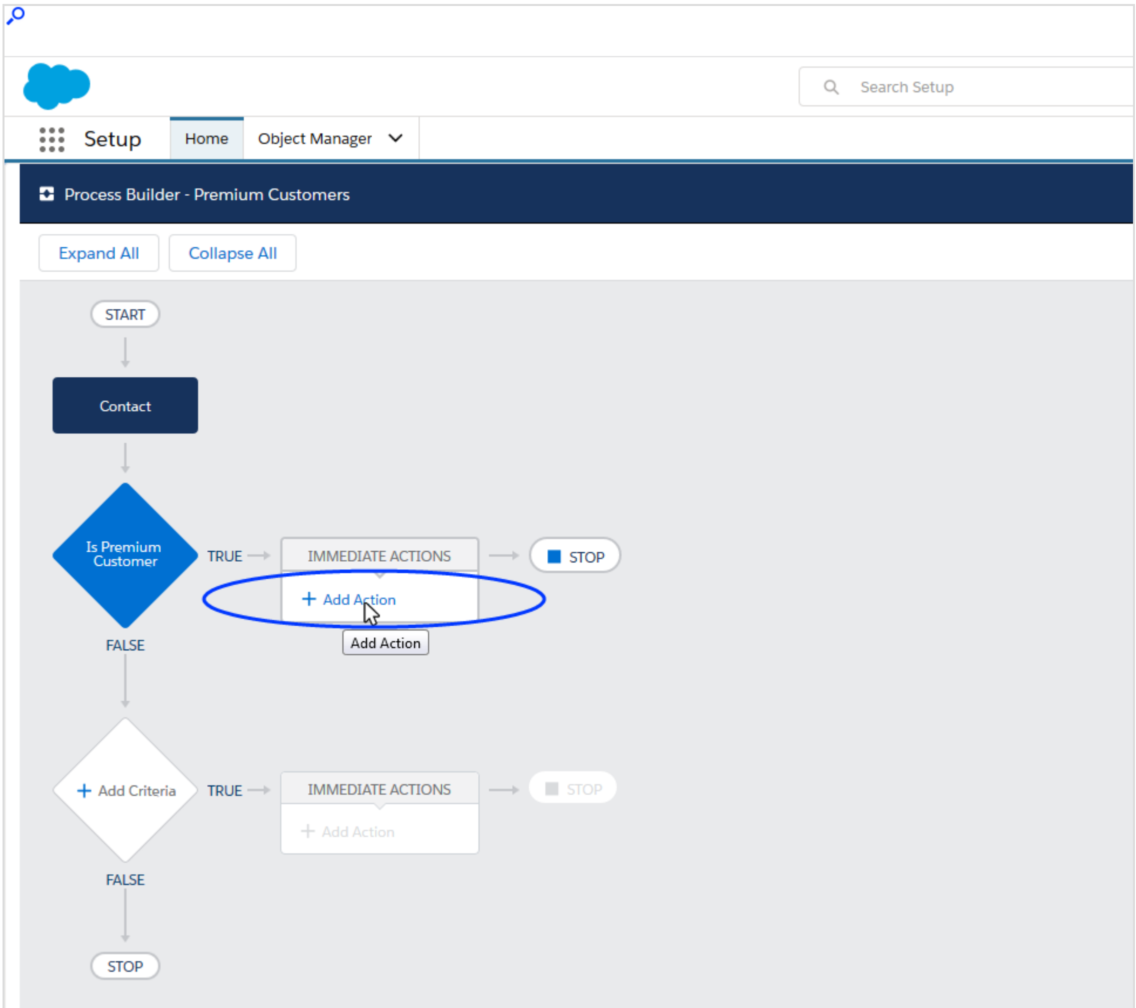
9. Set the **Operator** to **Equals**, the **Type** to **Picklist**, and the **Value** to **Primary**.



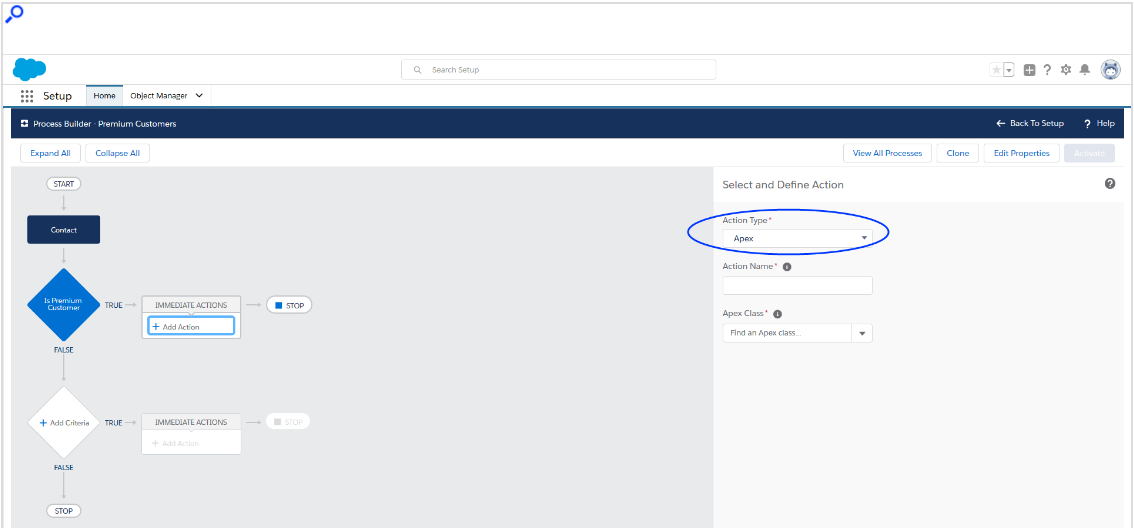
10. Under **Conditions**, select the **All of the conditions are met (AND)** option.



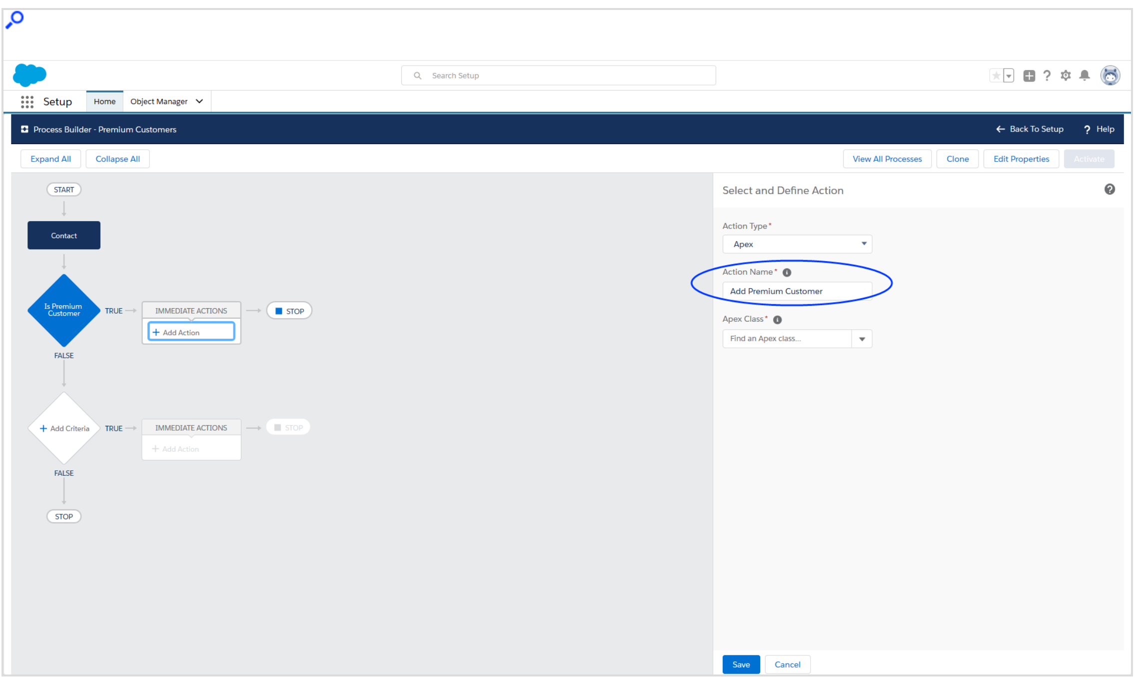
11. Click **Save**.
12. Click **Add action** under **Immediate actions** in the flowchart.



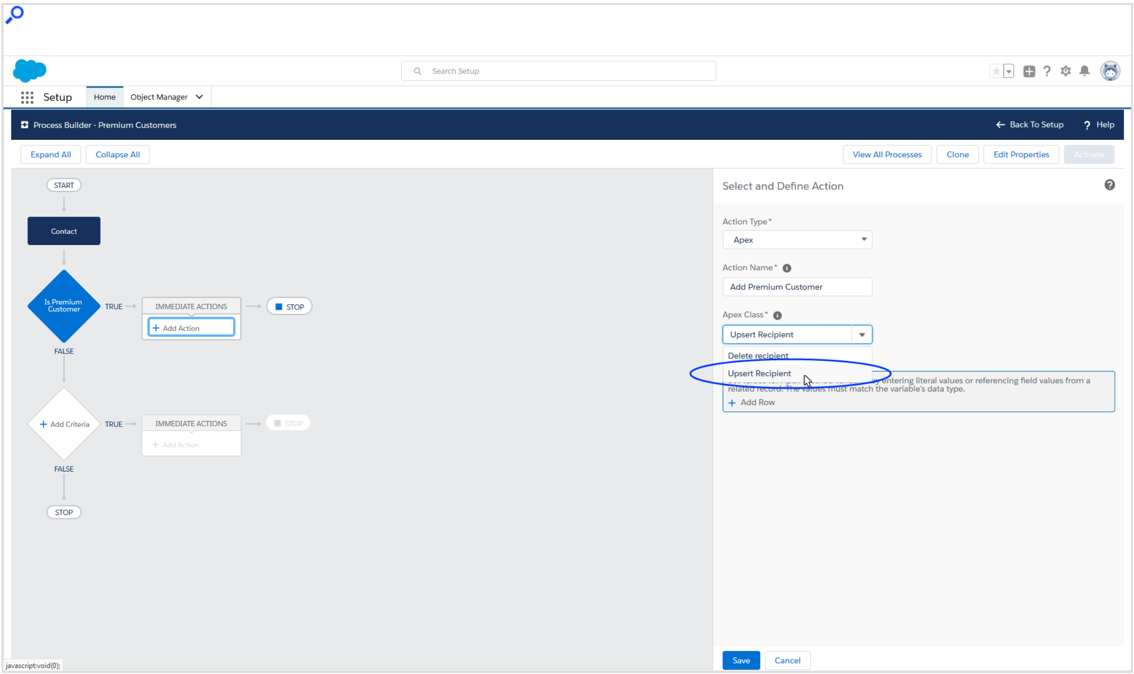
13. In the **Select and Define Action** window, select the **Apex** entry from the **Action Type** drop-down list.



14. Enter a name under **Action Name**, such as *Add Premium Customer*.

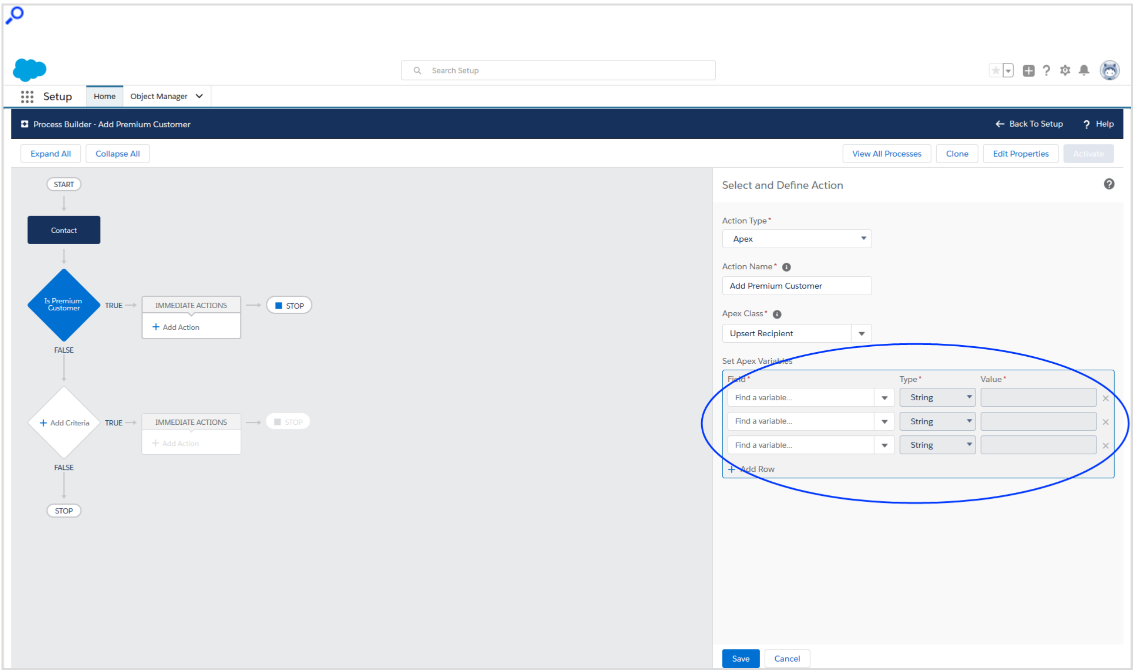


15. Select the **Upsert Recipient** entry from the **Apex Class** drop-down list.

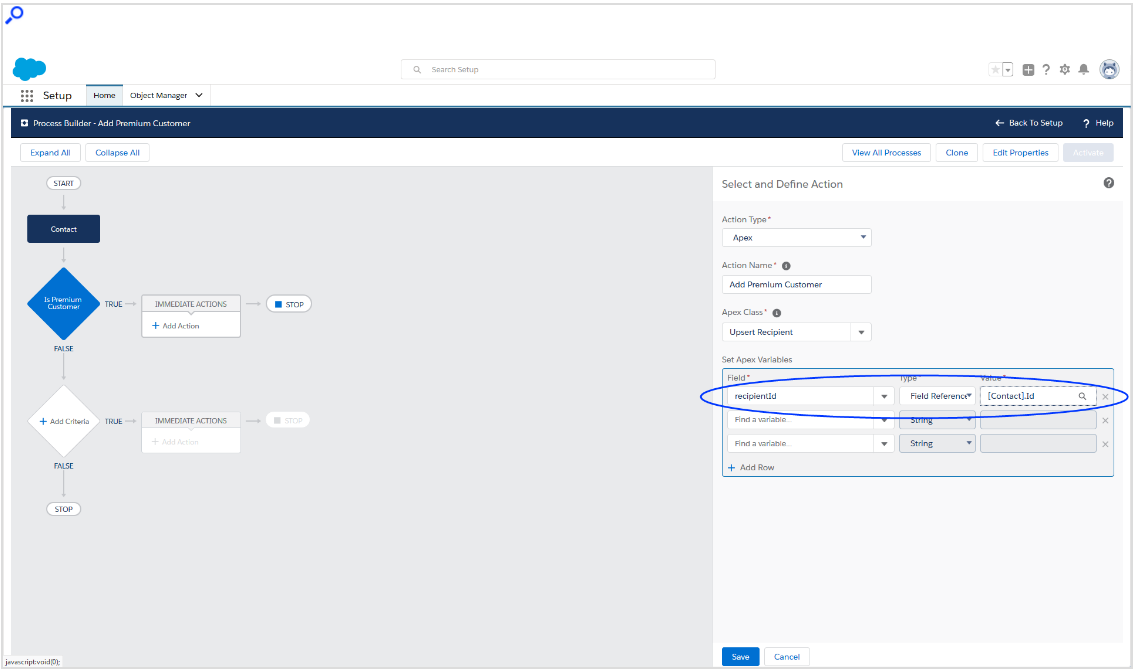


> **Note:** You need to configure three variables for the **Upsert Recipient** Apex class: **recipientId**, **recipientListId**, and **sfOptInId**.

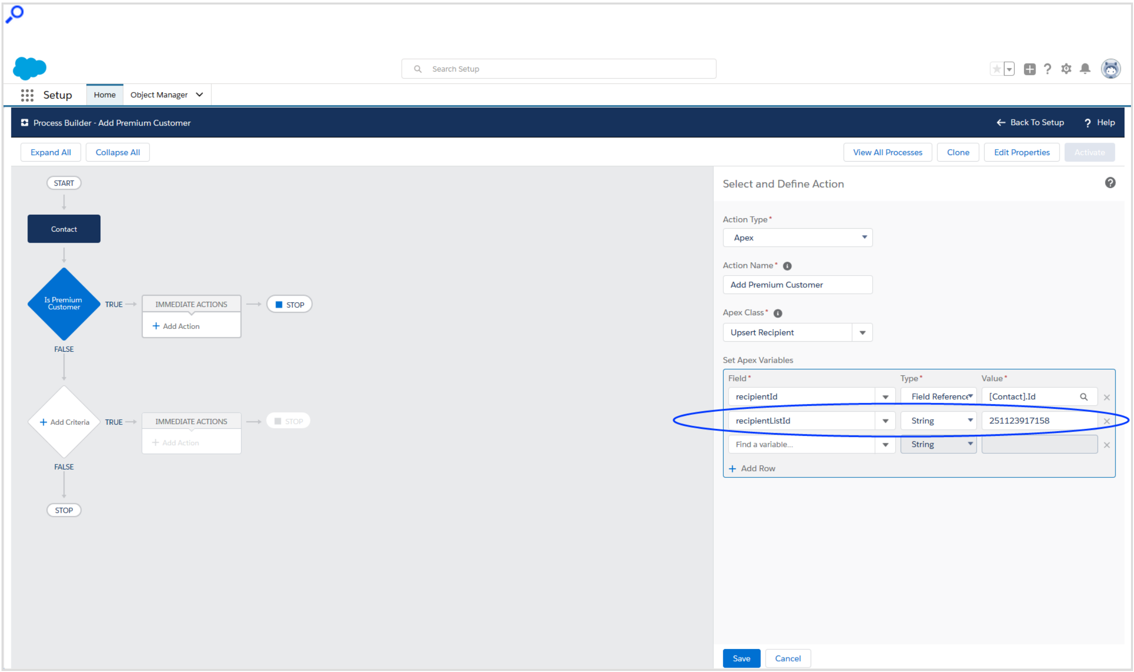
16. Under **Set Apex Variables**, click **Add Row** three times.



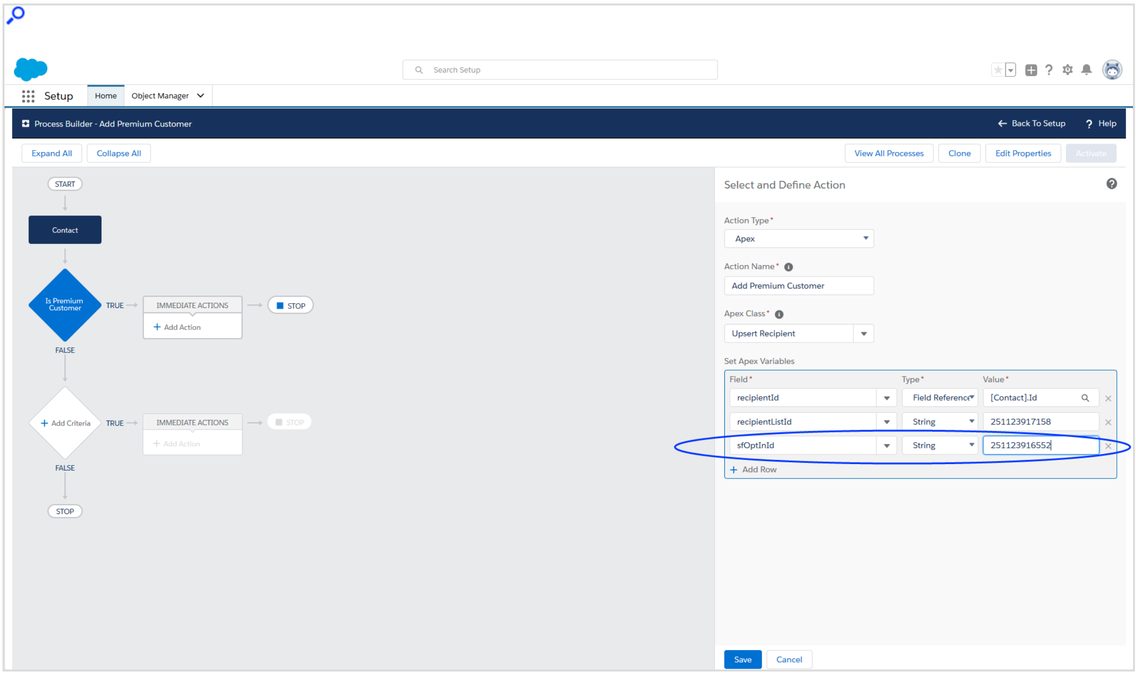
17. In the first drop-down list under **Field**, select the **recipientId** variable and set the type to **Field Reference**. Depending on the desired entity type, select the **Lead Id**, the **Contact Id**, or the **Personal Account Id** in the **Value** field.



18. In the second drop-down list under **Field**, select the **RecipientListId** variable and set the value to the ID of the Optimizely Campaign recipient list to which the *Premium Customers* are to be copied. To see the recipient list ID, open the Optimizely Campaign menu and select **Administration** > **API overview** > **Recipient lists**.



19. In the third drop-down list under **Field**, select the **sfOptInId** variable and set the value to the Salesforce ID of the created advertising permission. The type will automatically be set to **String**; do not make any changes here.

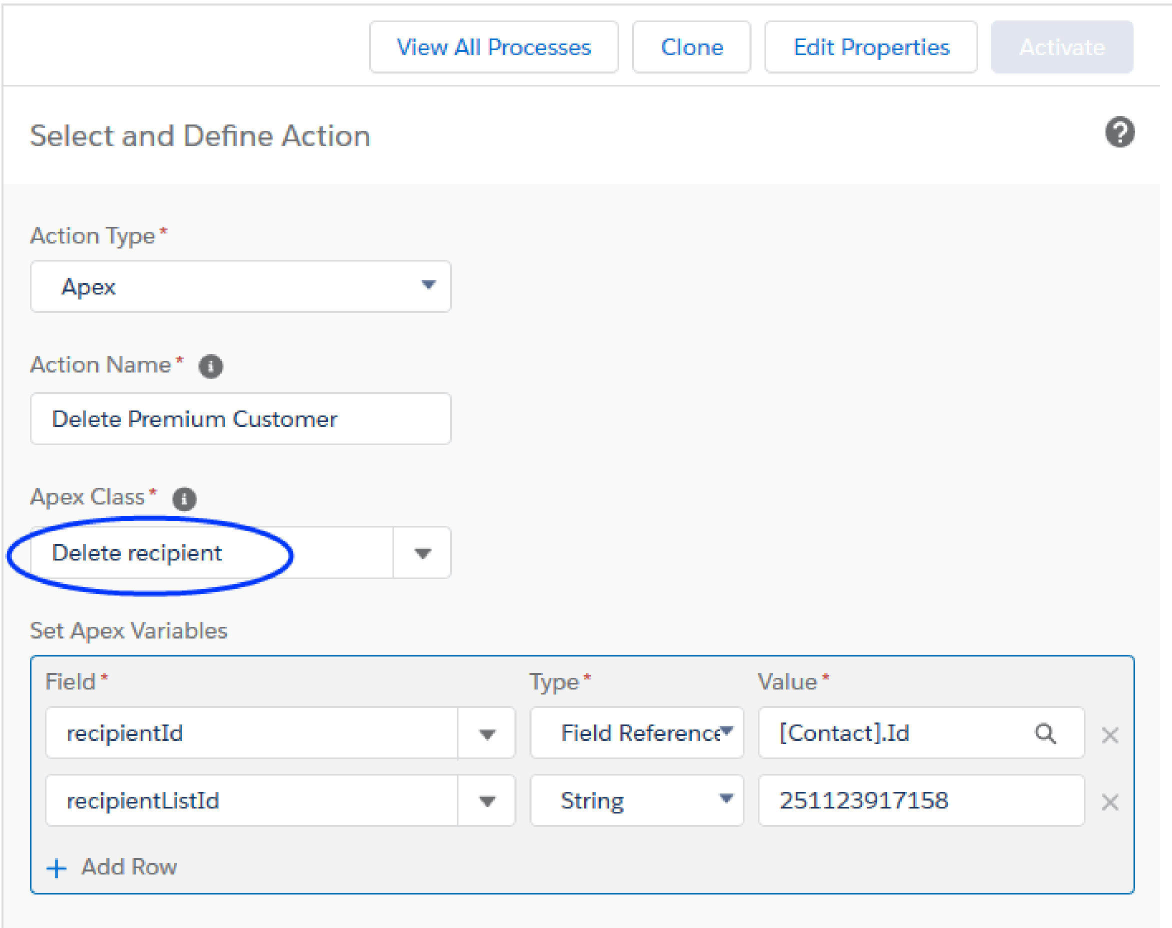


20. Click **Save**.

Deleting recipients from one recipient list and adding them to another recipient List

For example, a *Premium Customer* has achieved high revenues and qualified as a *Platinum Customer*. You want to delete this customer from the premium list and add it to the platinum list.

To delete recipients from one recipient list and add them to another, set up the **Delete recipient** class (which deletes the customer from the premium list) along with the **Upsert** Apex class (which adds the customer to the platinum list). Configure the **Delete recipient** Apex class only with the **recipientId** and **recipientListId** parameters. See steps 18 and 19 in the previous section.

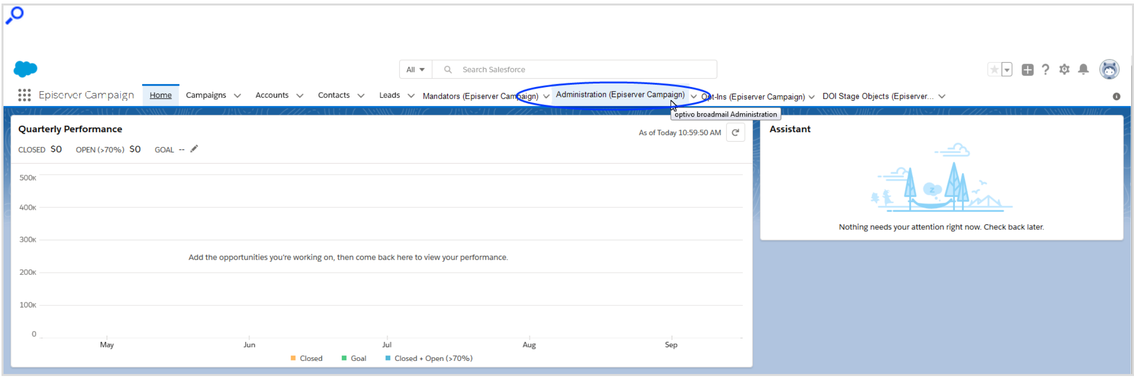


Enabling synchronization of deleted contacts, leads, and personal accounts

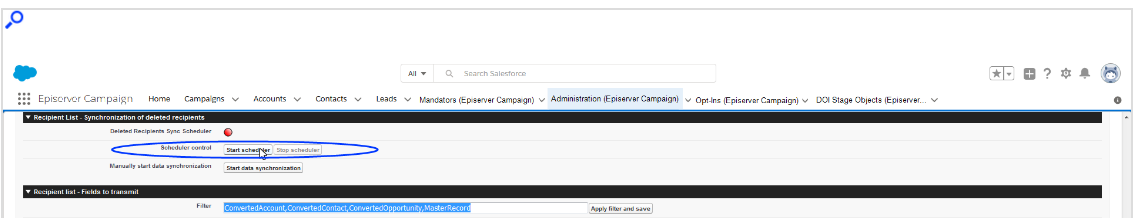
To completely delete deleted contacts, leads, and personal accounts from your recipient list in your Salesforce database as well, *do not* set up a separate process in Salesforce. The Salesforce add-on takes care of synchronizing your deleted Salesforce data sets if you enable automatic synchronization of deleted contacts, leads, and/or personal accounts. Perform the following steps:

© Optimizely 2022

1. Open the **Administration (Episerver Campaign)** tab.



2. In the **Administration (Episerver Campaign)** window, click **Start scheduler** under **Synchronization of deleted recipients**.



Tip: Click **End** to interrupt synchronization of the deleted data sets. This may be necessary, for example if the configuration is faulty, and you need to correct it.

Click **Start** under **Synchronize manually** to perform (one-time) manual data synchronization. A manual start lets you limit the period of access between Salesforce and Optimizely Campaign in the log files, thereby helping to diagnose any errors.

Import response data to Salesforce

Note: This topic is for administrators and developers with administration access rights in Salesforce.

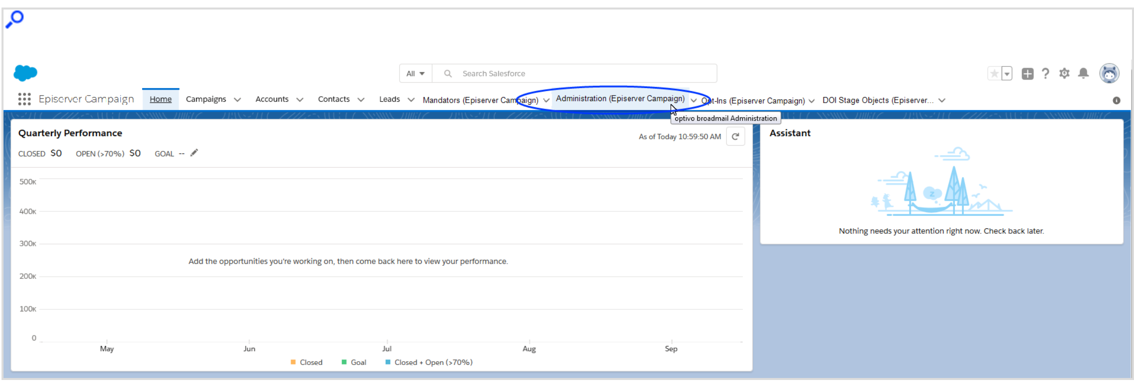
This topic describes how to automatically import the response data of your recipients (openings, clicks, unsubscribes, bounces, and direct replies) to Salesforce.

After sending a campaign, you need to enable synchronization of the response data by starting the data exchange. Once you have enabled synchronization, you will be able to view the response data and use it for additional marketing activities.

Starting data exchange

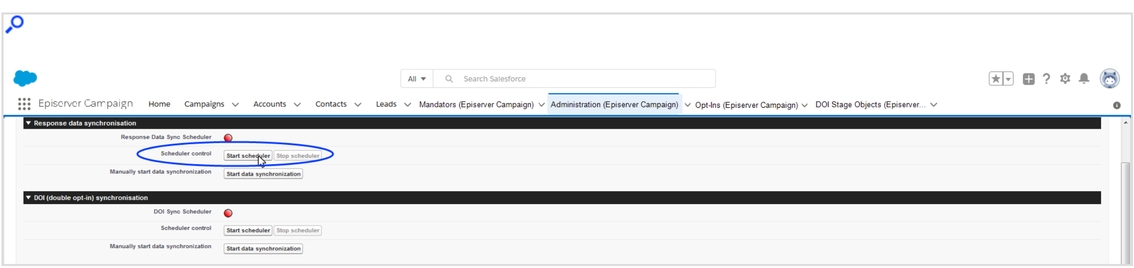
If you have set up at least one client in Salesforce (see Configuring advertising permissions), start the data exchange between Salesforce and Optimizely Campaign. Perform the following steps:

1. Log in to Salesforce CRM.
2. Open the **Administration (Episerver Campaign)** tab.

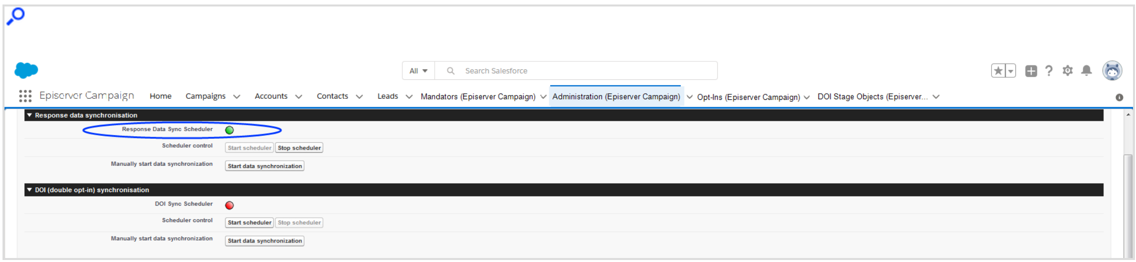


   The **Administration (Episerver Campaign)** window opens.

3. Under **Response data synchronization** > **Scheduler control**, click **Start scheduler**.



The **Start scheduler** button will be grayed-out when data synchronization is enabled. In addition, the icon next to **Response Data Sync Scheduler** will light up green.



Tip: Click **Stop scheduler** to interrupt synchronization of the deleted data sets. This may be necessary, such as if the configuration is faulty and you need to correct it.

Click **Start data synchronization** under **Synchronize manually** to perform (one-time) manual data synchronization. A manual start lets you limit the period of access between Salesforce and Optimizely Campaign in the log files, thereby helping to diagnose any errors.

Viewing response data

After an mailing has been sent, the Salesforce add-on automatically imports the response data from your contacts and leads to your CRM. The detail pages of the CRM campaigns, campaign members, and contacts/leads provide you with access to the following data:

- Dispatch status of the mailing
- Openings
- Clicks
- Bounces
- Unsubscribes
- Direct replies

Note: The response data of your contacts/leads is not transferred to Salesforce in real time. This data import may be delayed by several hours.

Microsoft Dynamics CRM integration

> **Note:** This topic is for administrators and developers with administration access rights in Microsoft Dynamics.

With the integration you can send campaigns from Microsoft Dynamics CRM via Optimizely Campaign. Send large information volumes securely via email and SMS. Add contacts and leads to a campaign, and use contact data for automatic personalized mailings in Optimizely Campaign.

Start campaign mailings in Microsoft Dynamics, and receive reports with sent and returned response data (opens, clicks, direct replies, outbounces and unsubscribes).

You can copy CRM (customer relationship management) marketing lists into Optimizely Campaign recipient lists, and automatically include new CRM contacts in a Marketing Automation campaign to for example send welcome and birthday mailings.

Features and supported versions

Feature	Microsoft Dynamics 365	Microsoft Dynamics CRM 2016	Microsoft Dynamics CRM 2015
Optimizely Campaign management	✓	✓	✓
Transfer of recipient data	✓	✓	✓
Copy marketing lists into Optimizely Campaign	✓	✓	✓
Transfer of response data	✓	✓	✓
Synchronize unsubscribes and outbounces	✓	✓	✓

> **Note:** Microsoft's Mainstream Support for Microsoft Dynamics CRM 2015 ended on January 14, 2020.

Setup

To set up the Microsoft Dynamics integration, contact customer support.

Provide Optimizely with the following information:

- Your SOAP API user name in Optimizely Campaign. If you do not have a SOAP API user account, contact customer support. Use a separate email address that is not used for logging into Optimizely Campaign.
- Any additional CRM data in addition to the standard data you want to be transferred to the Optimizely Campaign recipient list. See Configuring additional fields for the recipient list.
- The client IDs for the integration. To see the client ID, open the Optimizely Campaign menu and select **Administration** > **API Overview** > **REST API**.
- The IDs of the corresponding recipient lists, if you want to synchronize marketing lists with Optimizely Campaign. Alternatively, customer support can create new recipient lists. To find recipient list IDs, open the Optimizely Campaign menu and select **Administration** > **API overview** > **Recipient lists**.

See Troubleshooting and maintenance if there are issues with the integration.

These instructions apply to the Microsoft Dynamics 365 online version. Procedures are similar for on-premises versions.

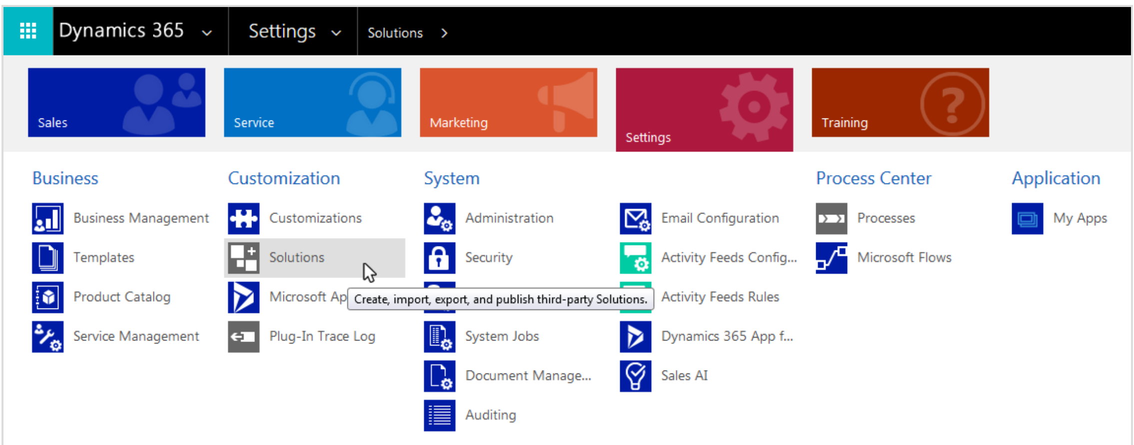
Installation

> **Note:** This topic is for administrators and developers with administration access rights in Microsoft Dynamics.

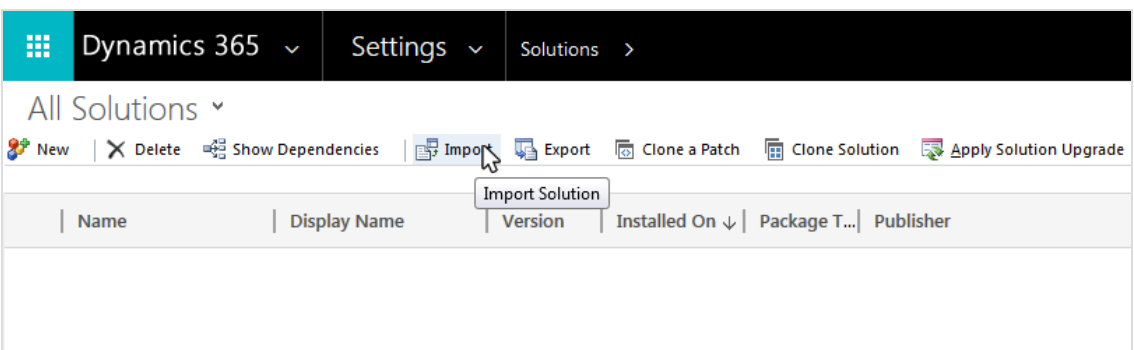
This topic describes how to install the Microsoft Dynamics CRM integration, if you are using this with Optimizely Campaign.

Installing the software package

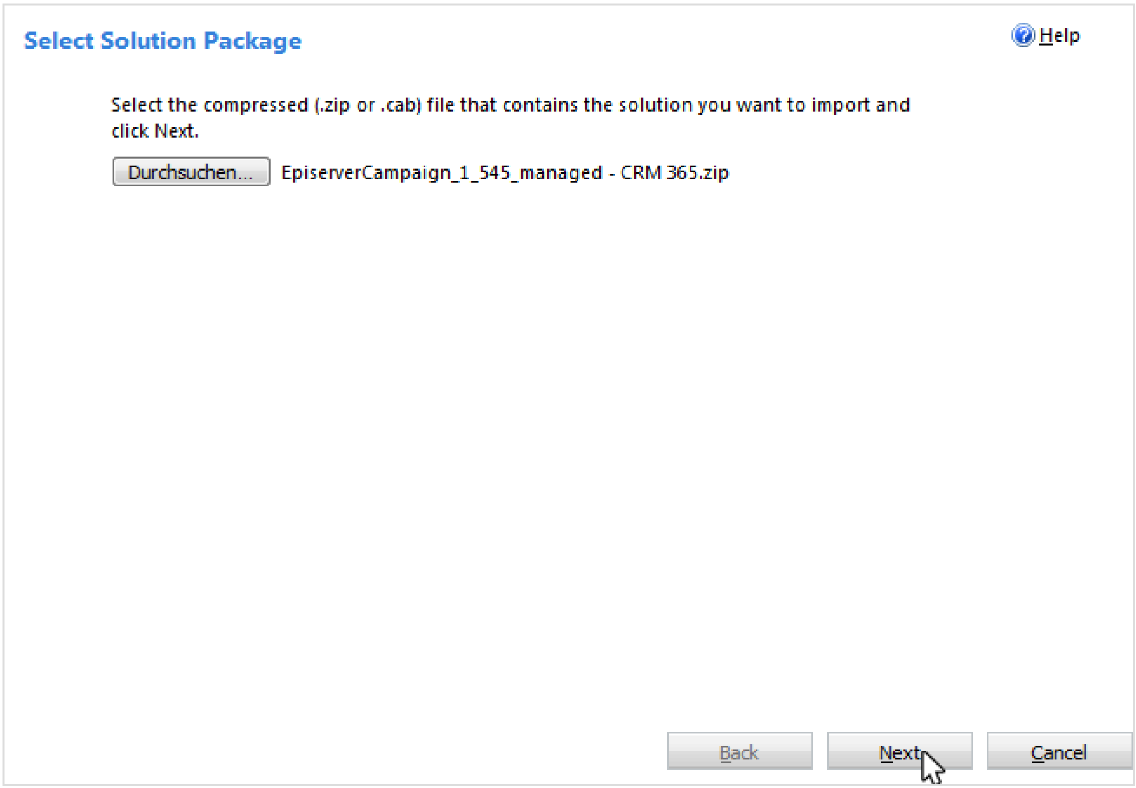
1. Install the software package you received from customer support in Microsoft Dynamics CRM.
2. Log in to Microsoft Dynamics CRM with administrator rights.
3. Open the settings and click **Solutions** in the **Customization** menu.



4. Click **Import** and select the file to upload.

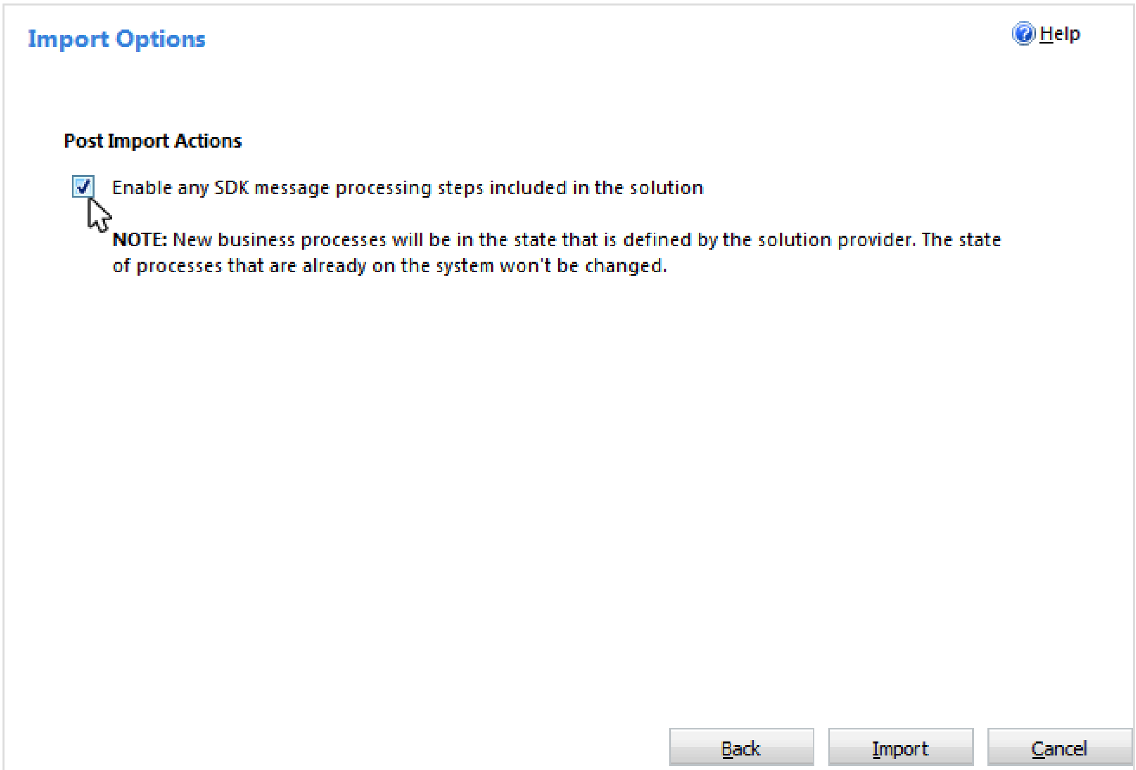


5. Select the compressed software package ZIP file and click **Next**. When uploaded, package information including name, publisher, and type is displayed.

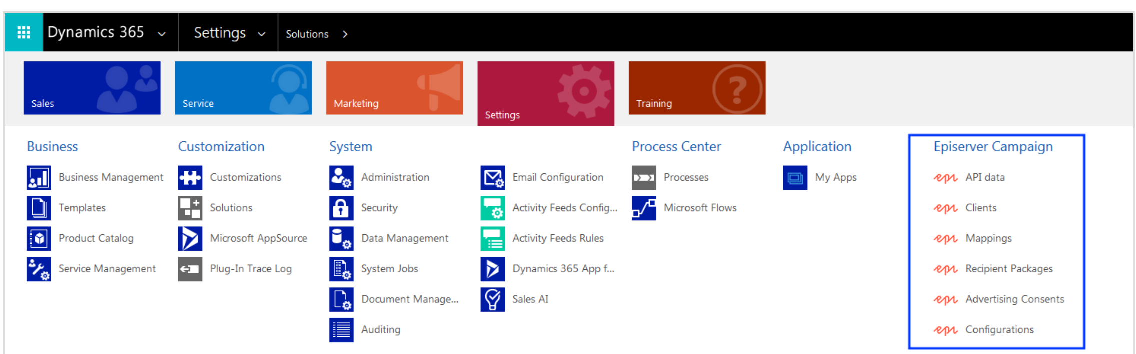

Select Solution Package
Help
Select the compressed (.zip or .cab) file that contains the solution you want to import and click Next.
Durchsuchen...
EpiserverCampaign_1_545_managed - CRM 365.zip
Back
Next
Cancel

6. Click **Next**.

7. Select **Enable any SDK message processing steps included in the solution**.



8. Click **Import**. When completed you can download the log files. The CRM settings now has an additional **Episerver Campaign** area.



The integration provides two CRM roles:

- **Episerver Campaign Administrator**. For administering the integration and modifying settings.
- **Episerver Campaign User**. For working with campaigns via Optimizely Campaign.

Installing updates

The difference compared to an initial installation is that you will be notified that the uploaded file is an update for an installed solution. To keep your integration settings, user accounts, passwords, and response data, activate the option **Maintain customizations (recommended)**.

Extended recipient list connector

The current version of Microsoft Dynamics CRM cannot address more than 100,000 recipients per campaign. The extended recipient list connector for Optimizely Campaign is an external Windows service that removes the technical limitation and controls campaigns and the transmission of marketing lists with more than 100,000 recipients. See **Extended recipient list connector**.

Multi client setup

The Microsoft Dynamics CRM integration allows you store up to three Optimizely Campaign clients in one organization. A reverse mapping from multiple Microsoft Dynamics CRM organizations to one Optimizely Campaign client is not possible.

Configuration

> **Note:** This topic is for administrators and developers with administration access rights in Microsoft Dynamics.

This topic describes how to configure the Microsoft Dynamics CRM integration, if you are using this with Optimizely Campaign.

The configuration includes these steps:

1. Enter SOAP API user data.
2. Enter client IDs.
3. Start response data workflows.
4. Assign Optimizely Campaign test lists
5. Create advertising consents and link to client.

To transfer fields not included in the standard configuration, you must also configure the additional fields for your Optimizely Campaign recipient list.

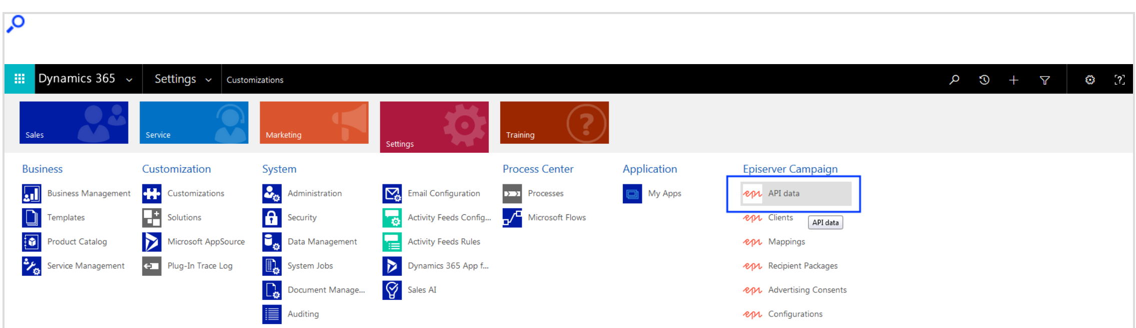
Entering SOAP API user data

Communication and data exchange between Microsoft Dynamics and Optimizely Campaign uses the SOAP API. To link CRM with Optimizely Campaign via the interface, you must enter your SOAP API user data in Microsoft Dynamics.

> **Note:** If you do not have a SOAP API user account, contact customer support.

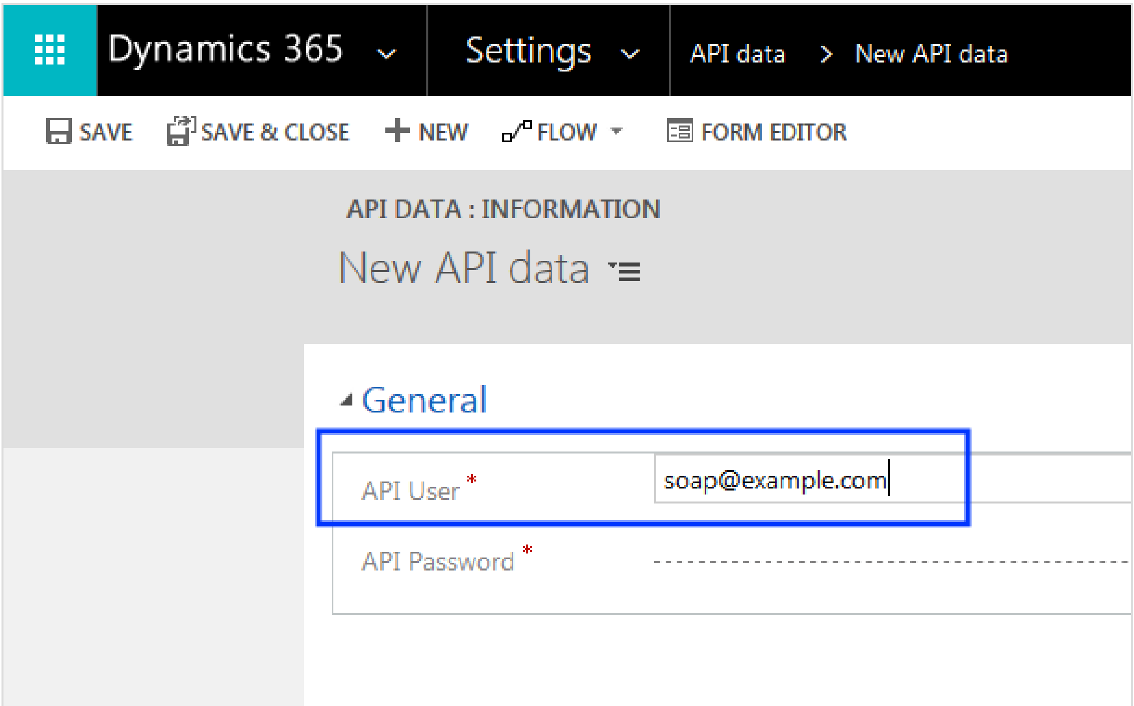
1. Log in to Microsoft Dynamics CRM with administrator rights.
2. Open Microsoft Dynamics CRM and select **Settings** > **API data**.

   > **Tip:** The integration adds a new **Episerver Campaign** section to your CRM settings.

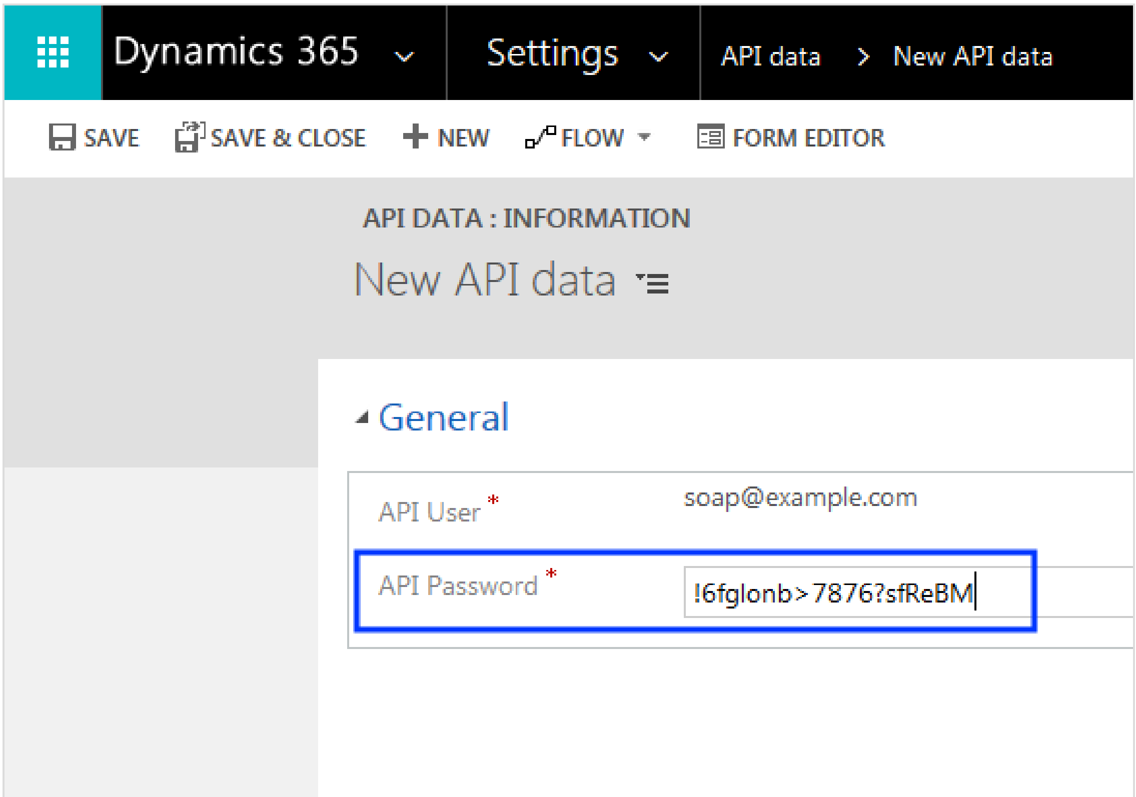
   

3. Click **New**.

4. For **API User**, enter your SOAP API user name.



5. For **API Password**, enter your SOAP API password.

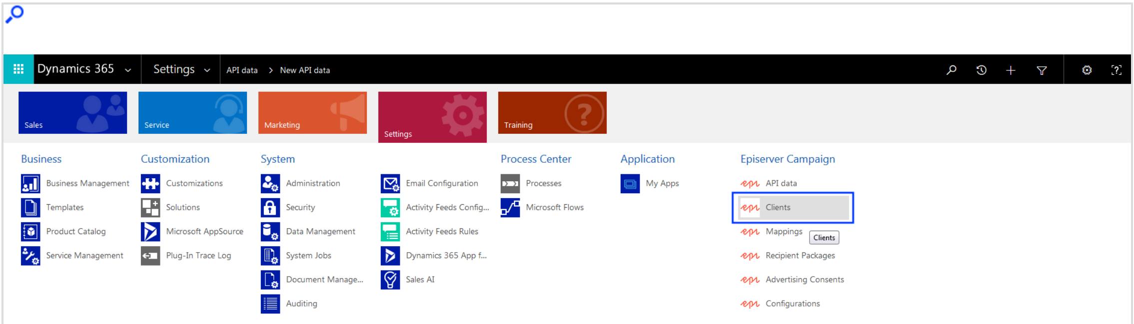


6. Click **Save & Close**.

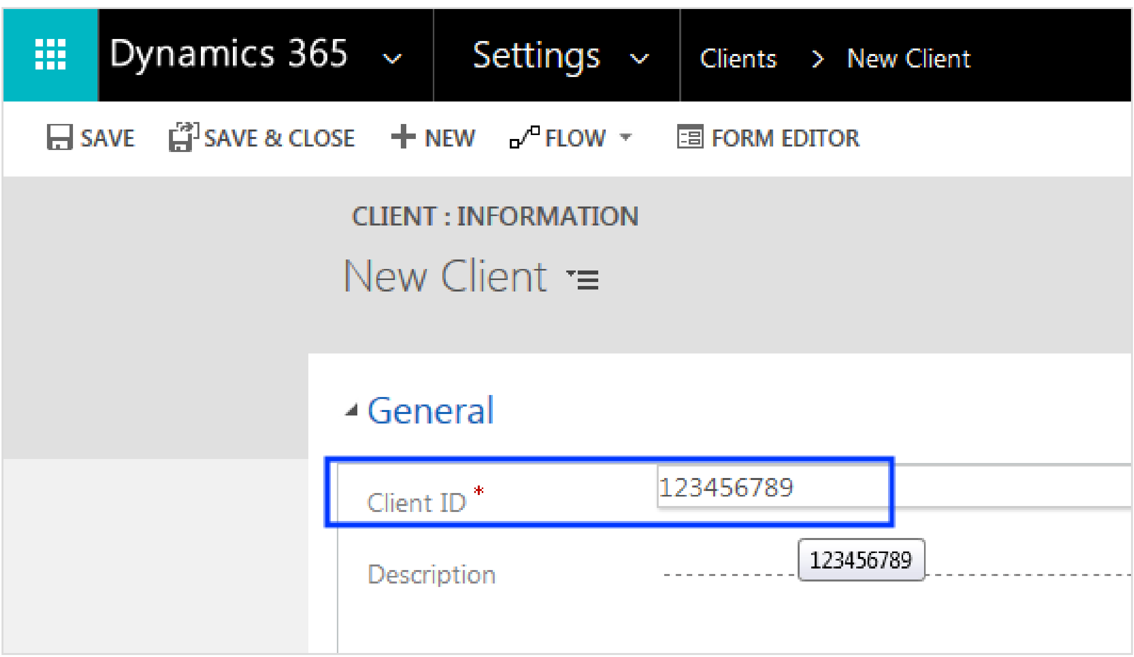
Entering client IDs

To run campaigns, specify which Optimizely Campaign client you want to use in CRM for sending.

1. Open Microsoft Dynamics CRM and select **Settings** > **Clients**.

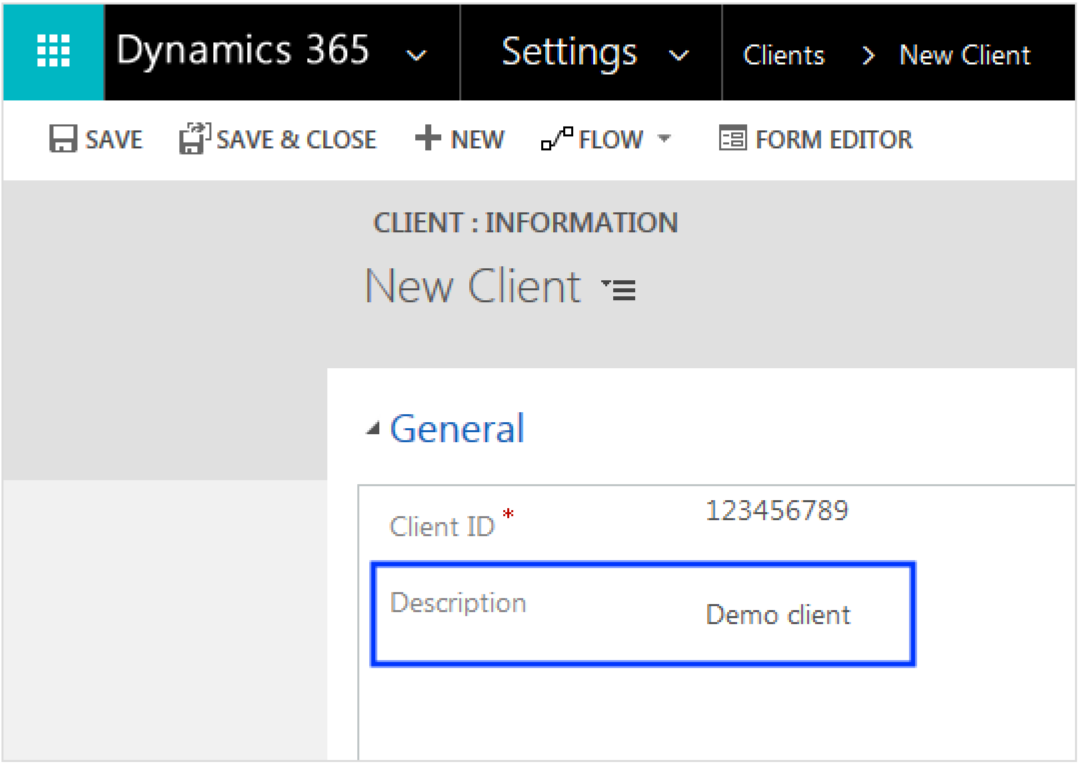


2. Click **New**.
3. For **Client ID**, enter the ID of the client to use for sending campaigns.



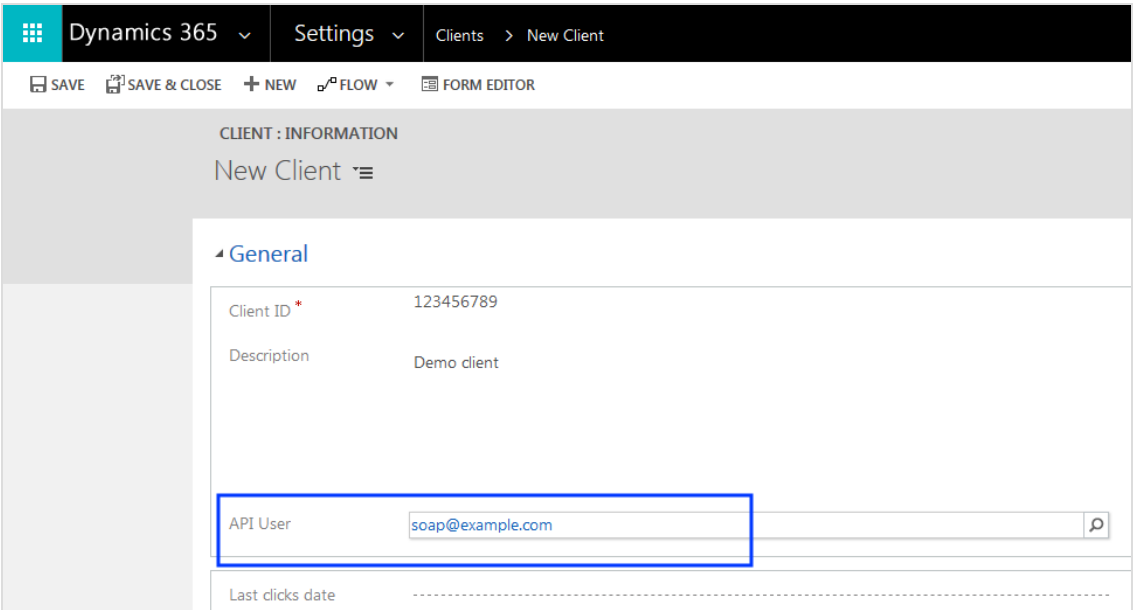
Tip: You can find the client ID in the Optimizely Campaign menu under **API Overview** > **REST API**.

4. For **Description**, enter the name of the client.



Tip: The name of client is displayed at top right in the menu bar in Optimizely Campaign.

5. For **API User**, select your SOAP API user. See Enter SOAP API user data.



6. Click **Save & Close**. To add more clients, repeat the steps for each additional client.

Starting response data workflows

To feed campaign response data from contacts and leads in Optimizely Campaign into CRM, start the response data workflows for each individual client. The workflows query and import recipient response data in 60-minute intervals.

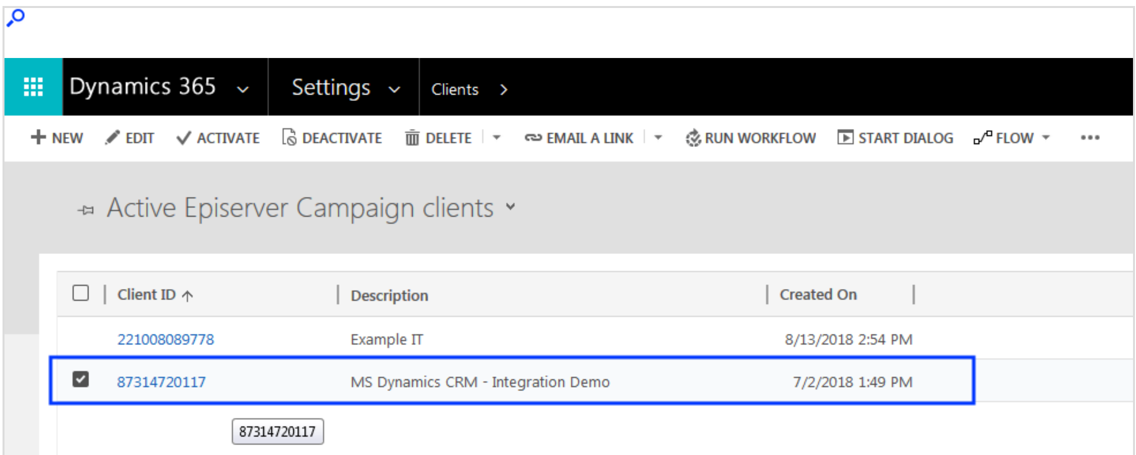
These workflows are available for each response type:

Workflow	Response type
Optimizely: Get opens	Mailing opened
Optimizely: Get clicks	Link clicked in the mailing
Optimizely: Get responses	Direct reply to the mailing
Optimizely: Get unsubscribes	Newsletter unsubscribes

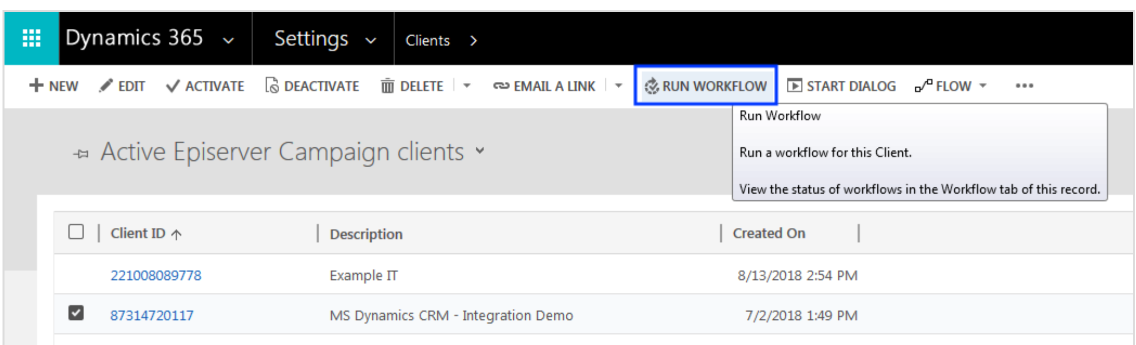
Workflow	Response type
Optimizely: Get outbounces	Outbounce (the recipient has exceeded the bounce limit)

Do the following to start workflows:

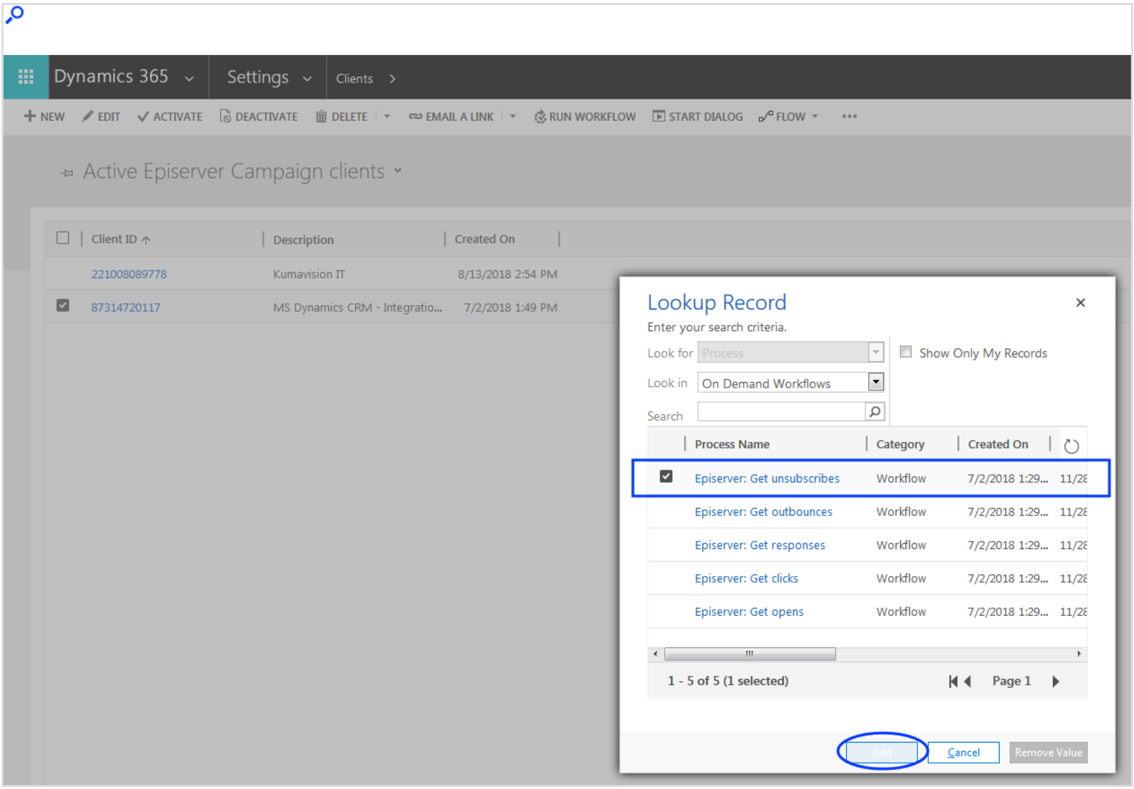
1. Select the clients to start workflows for. If the list of clients does not open, go to **Settings** > **Clients**.



2. Click **Run Workflow**.



3. Select a workflow and click **Add**.



4. Click **OK** to confirm.
5. Repeat steps 1–4 for each workflow.

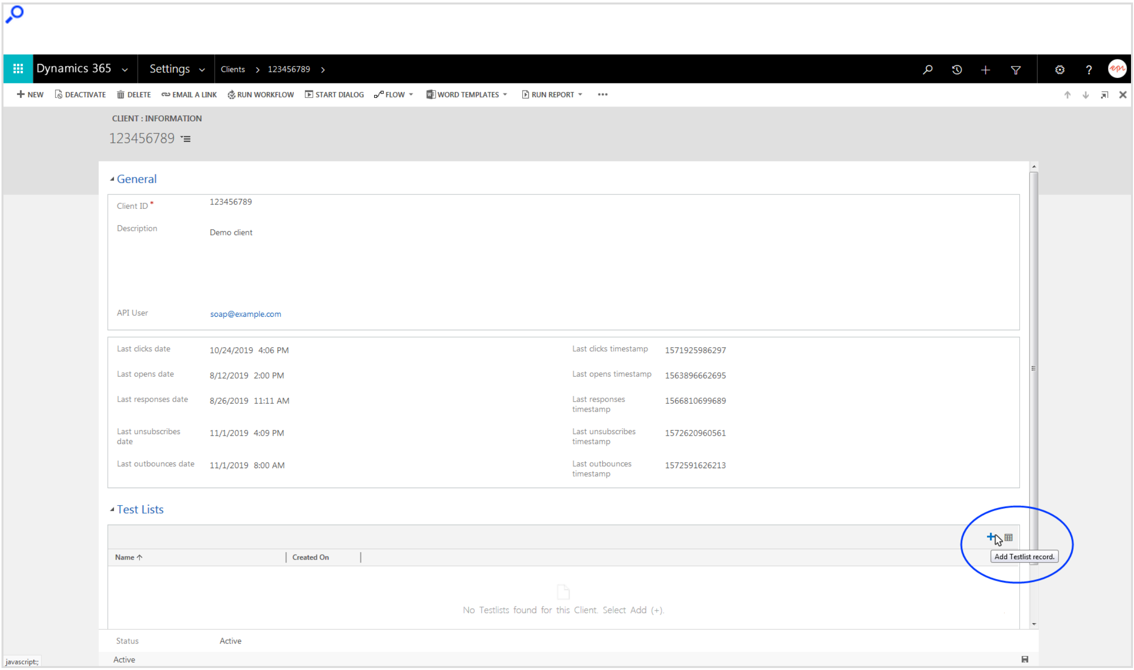
You can see workflow activity in the **Information** view for the client. Click the corresponding client ID in the list to open it. Under access data, you can see when the workflow was last run, and timestamp for the most recently imported data.

Assigning Optimizely Campaign test lists

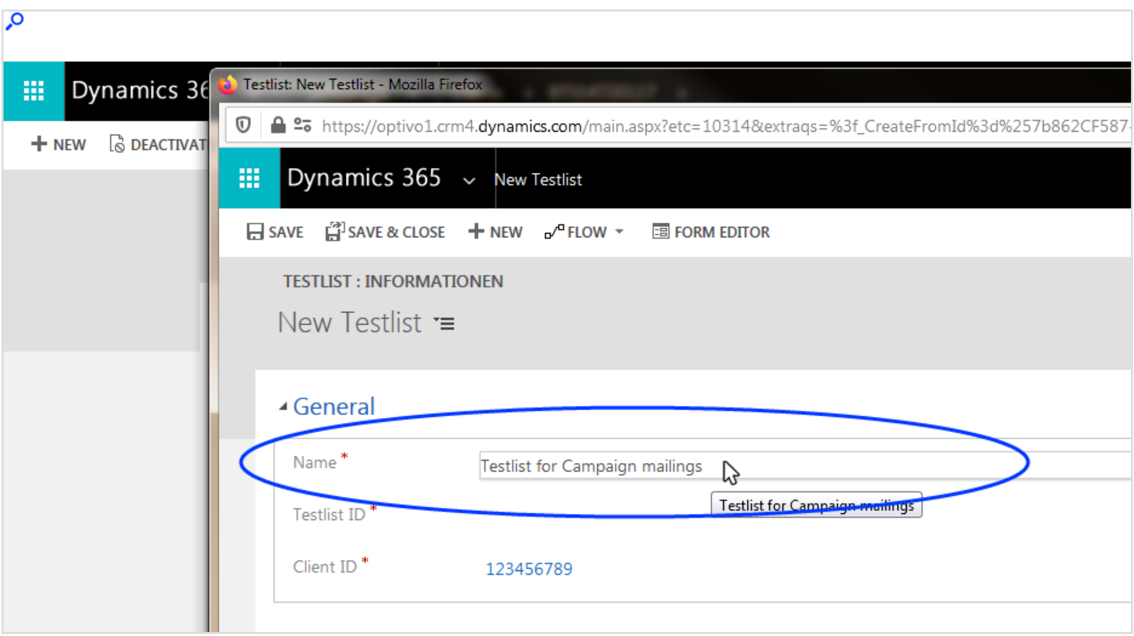
To check the campaign mailings before dispatch, you can send them to a Optimizely Campaign test list. To do this, you must assign the Optimizely Campaign test list in Microsoft Dynamics CRM. Do the following:

1. Go to **Settings** > **Episerver Campaign** > **Episerver Campaign** > **Clients**.
2. Click **Client**.

3. Click **Add Testlist record**.

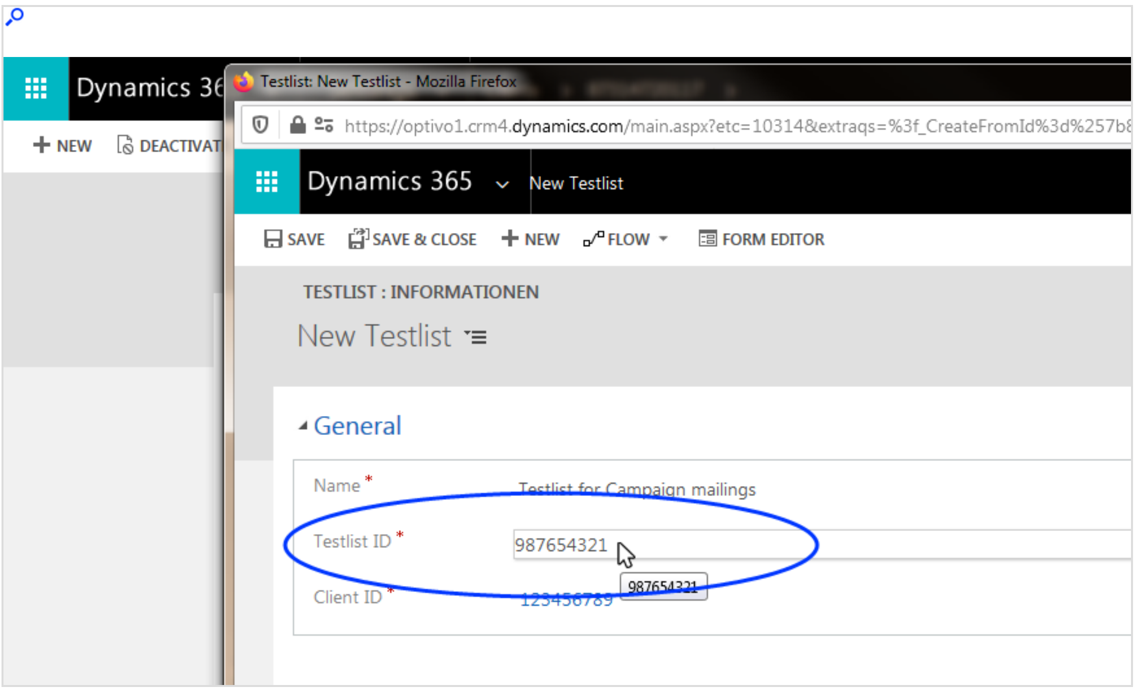


4. Enter a name for the test list.

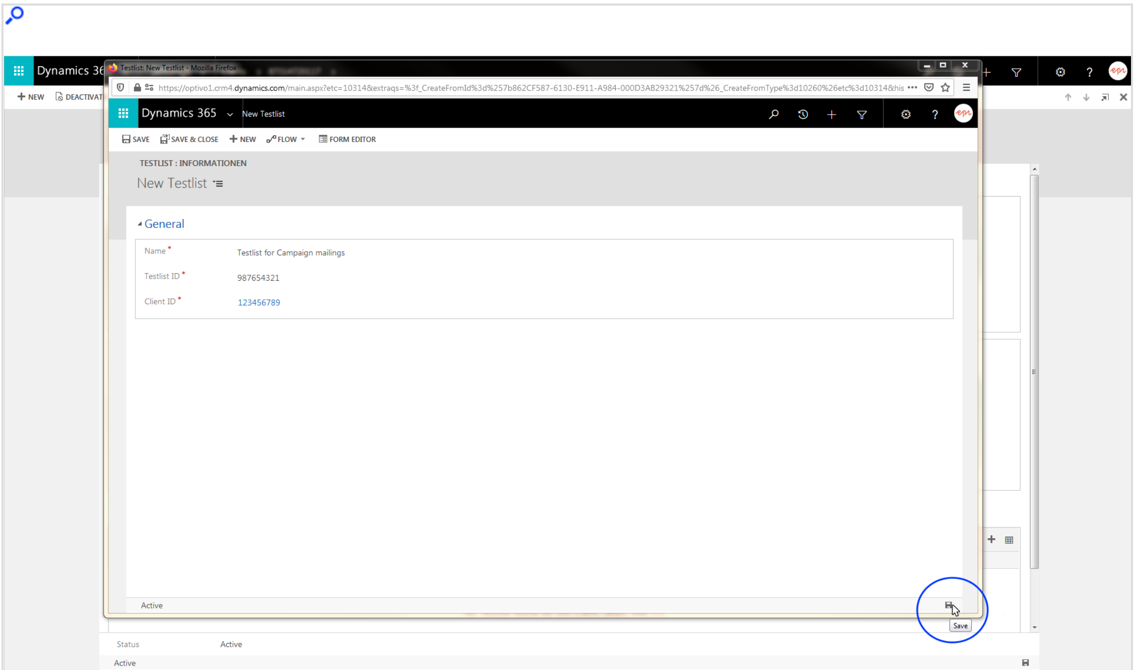


5. Enter the recipient list ID of the test list. To see the recipient list ID, open the Optimizely Campaign menu and select **Administration** > **API overview** > **Recipient lists**.

> **Tip:** If you are missing the **ID** column, click the down arrow **v** in the upper right corner of the table header and activate the **ID** check box.



6. Click **Save** and close the window.



> **Tip:** To assign more test lists, repeat the steps for each additional test list.

Creating consents and linking to client

To send mailings, you need advertising consent from contacts and leads. The consent protects recipients from unwanted omnichannel marketing. See also Opt-in. The integration checks two fields in Microsoft Dynamics for each contact and lead, to see if consent is given or withdrawn, and will not transfer recipients without consent.

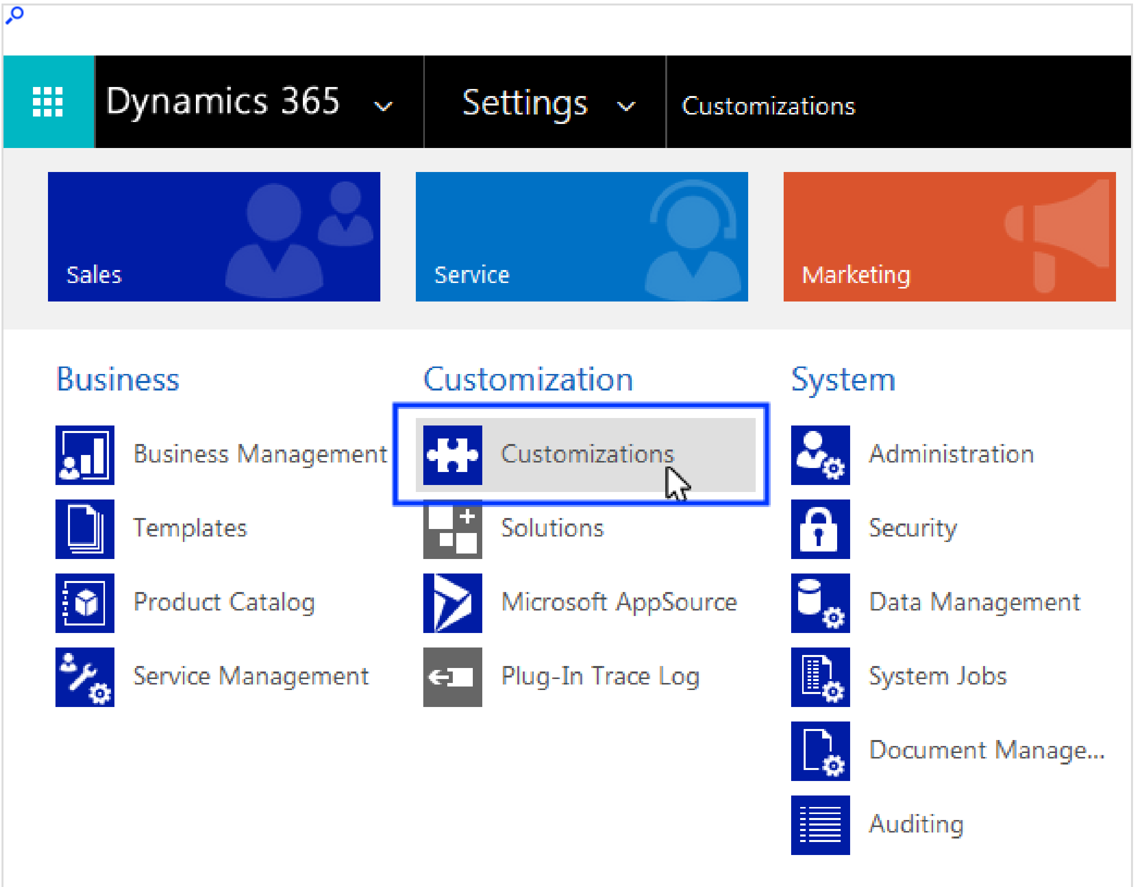
Furthermore, you record the bounce status for the contact, lead or account, which makes a statement about the functionality of the advertising agreement.

Perform the following steps:

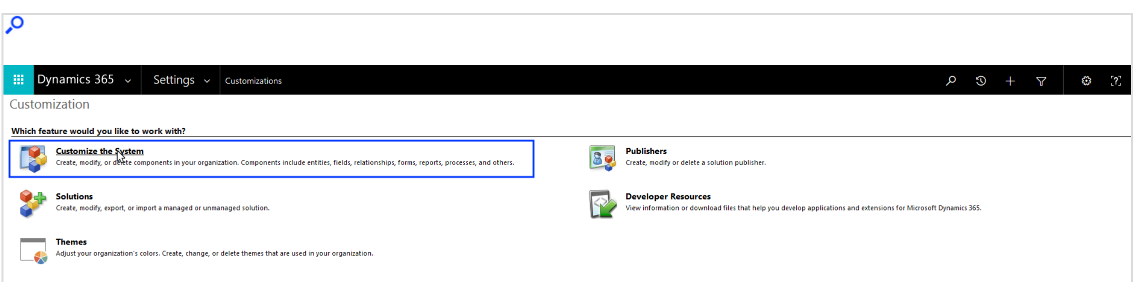
1. Creating a bounce status field
2. Adding the bounce status field to a form
3. Creating advertising consent and associating the bounce status field

Creating a bounce status field

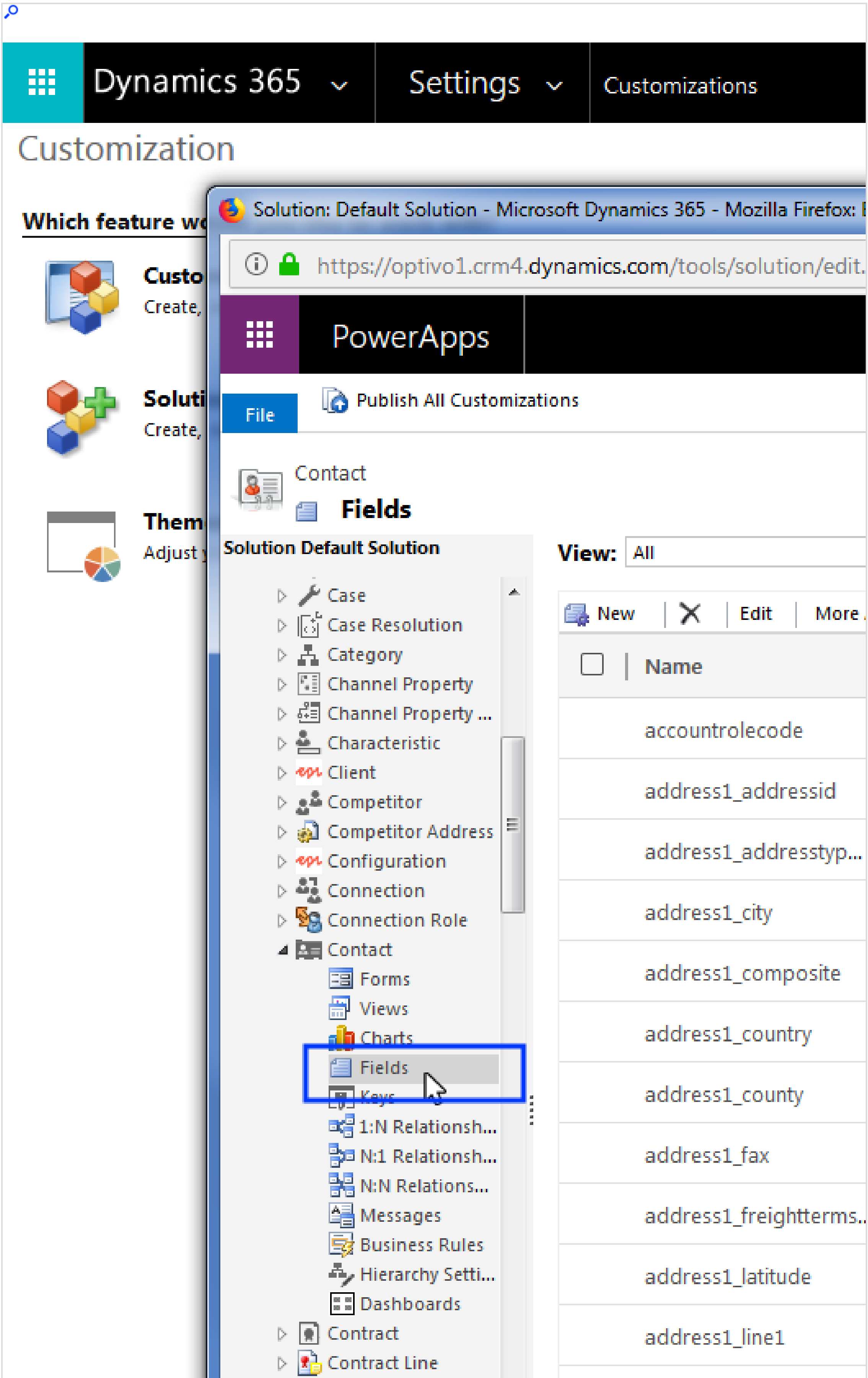
1. Log in to Microsoft Dynamics CRM with administrator rights.
2. Go to **Settings** > **Customizations**.



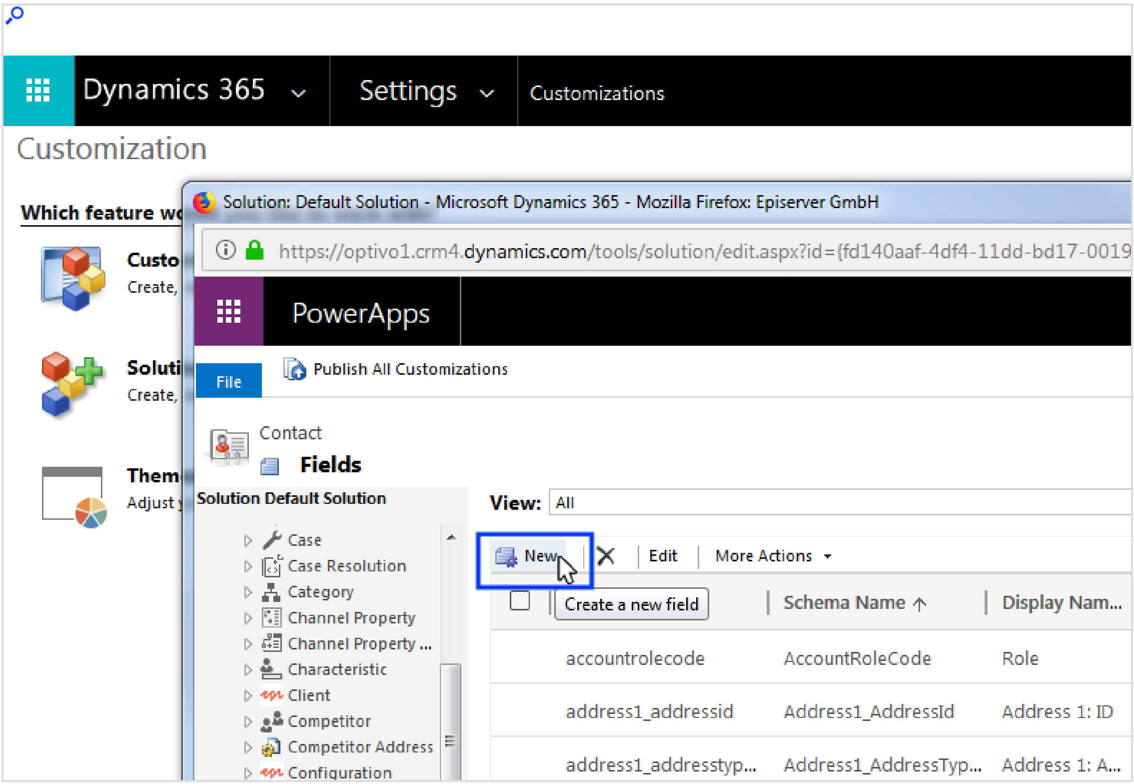
3. Click **Customize the System**.



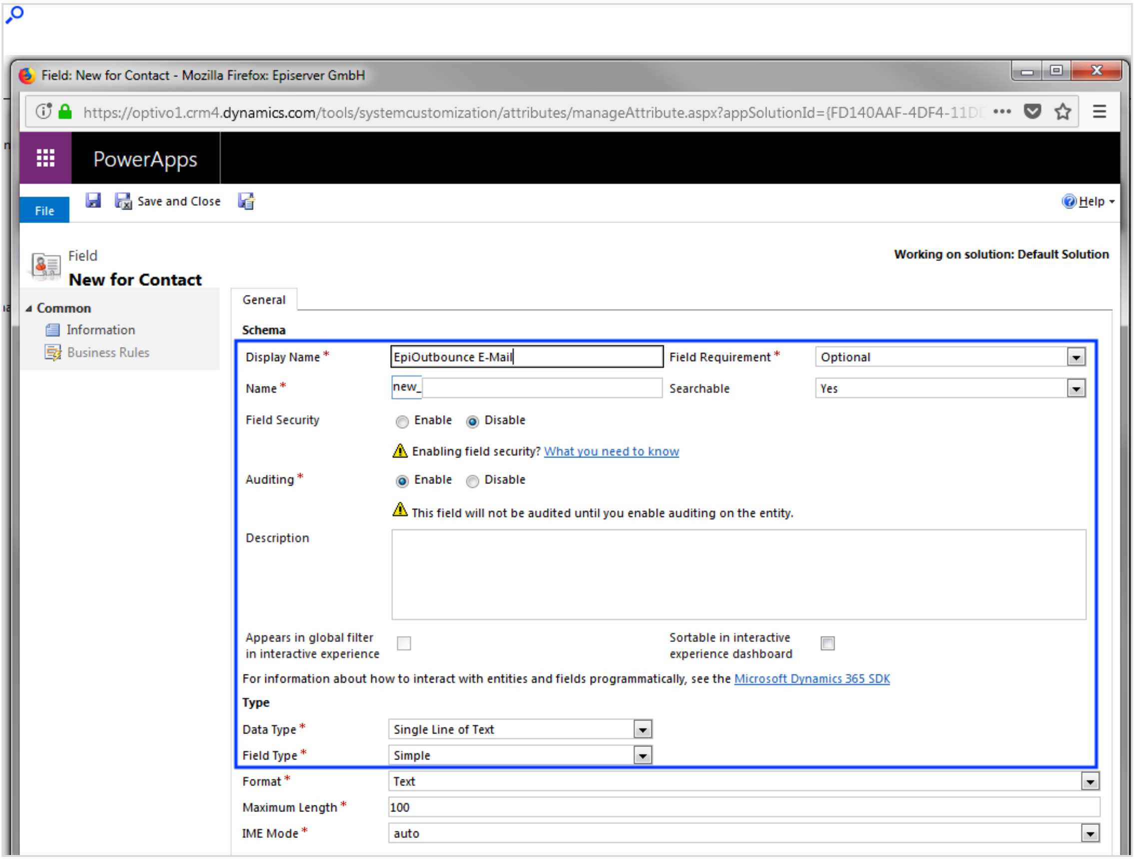
4. Use the side navigation to go to **Components** > **Entities** > **Contact** or **Lead** or **Account** > **Fields**.


Dynamics 365
Settings
Customizations
Customization
Which feature w
Custo
Create,
Soluti
Create,
Them
Adjust
Solution: Default Solution - Microsoft Dynamics 365 - Mozilla Firefox
https://optivo1.crm4.dynamics.com/tools/solution/edit.
PowerApps
File
Publish All Customizations
Contact
Fields
Solution Default Solution
View:
All
Case
Case Resolution
Category
Channel Property
Channel Property ...
Characteristic
Client
Competitor
Competitor Address
Configuration
Connection
Connection Role
Contact
Forms
Views
Charts
Fields
Keys
1:N Relationsh...
N:1 Relationsh...
N:N Relations...
Messages
Business Rules
Hierarchy Setti...
Dashboards
Contract
Contract Line
New
Edit
More
Name
accountrolecode
address1_addressid
address1_addresstyp...
address1_city
address1_composite
address1_country
address1_county
address1_fax
address1_freightterms...
address1_latitude
address1_line1

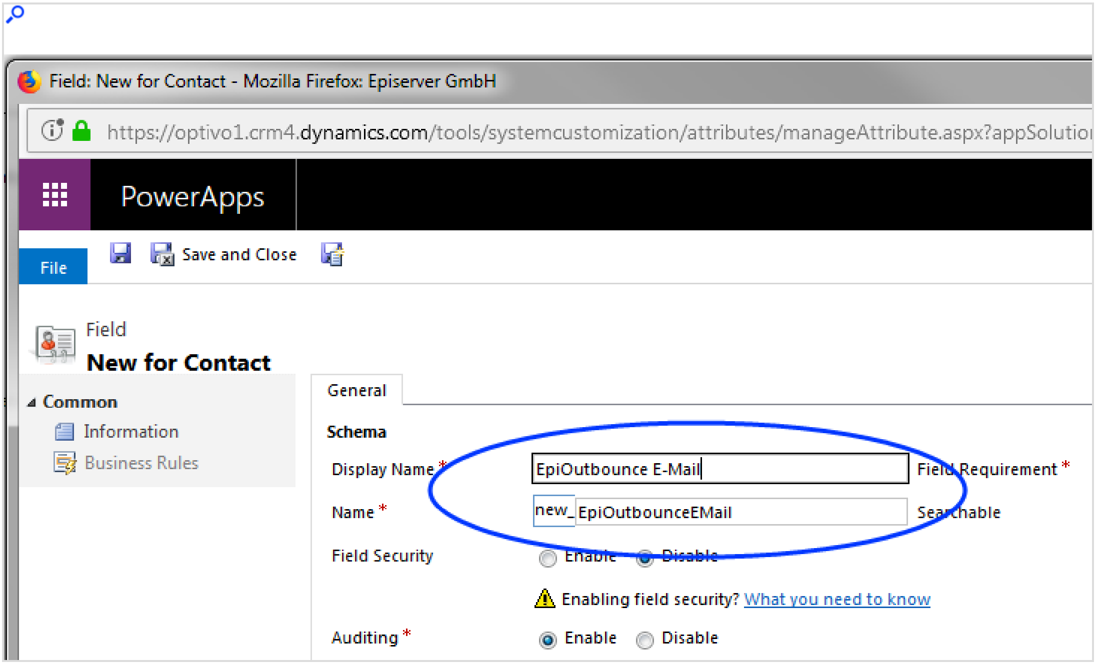
5. Click **New**.


Dynamics 365
Settings
Customizations
Customization
Which feature wo
Custo
Create,
Soluti
Create,
Them
Adjust y
Solution: Default Solution - Microsoft Dynamics 365 - Mozilla Firefox: Episerver GmbH
https://optivo1.crm4.dynamics.com/tools/solution/edit.aspx?id={fd140aaf-4df4-11dd-bd17-0019
PowerApps
File
Publish All Customizations
Contact
Fields
Solution Default Solution
View: All
Case
Case Resolution
Category
Channel Property
Channel Property ...
Characteristic
Client
Competitor
Competitor Address
Configuration
New
Edit
More Actions
Create a new field
Schema Name
Display Nam...
accountrolecode
AccountRoleCode
Role
address1_addressid
Address1_AddressId
Address 1: ID
address1_addresstyp...
Address1_AddressTyp...
Address 1: A...

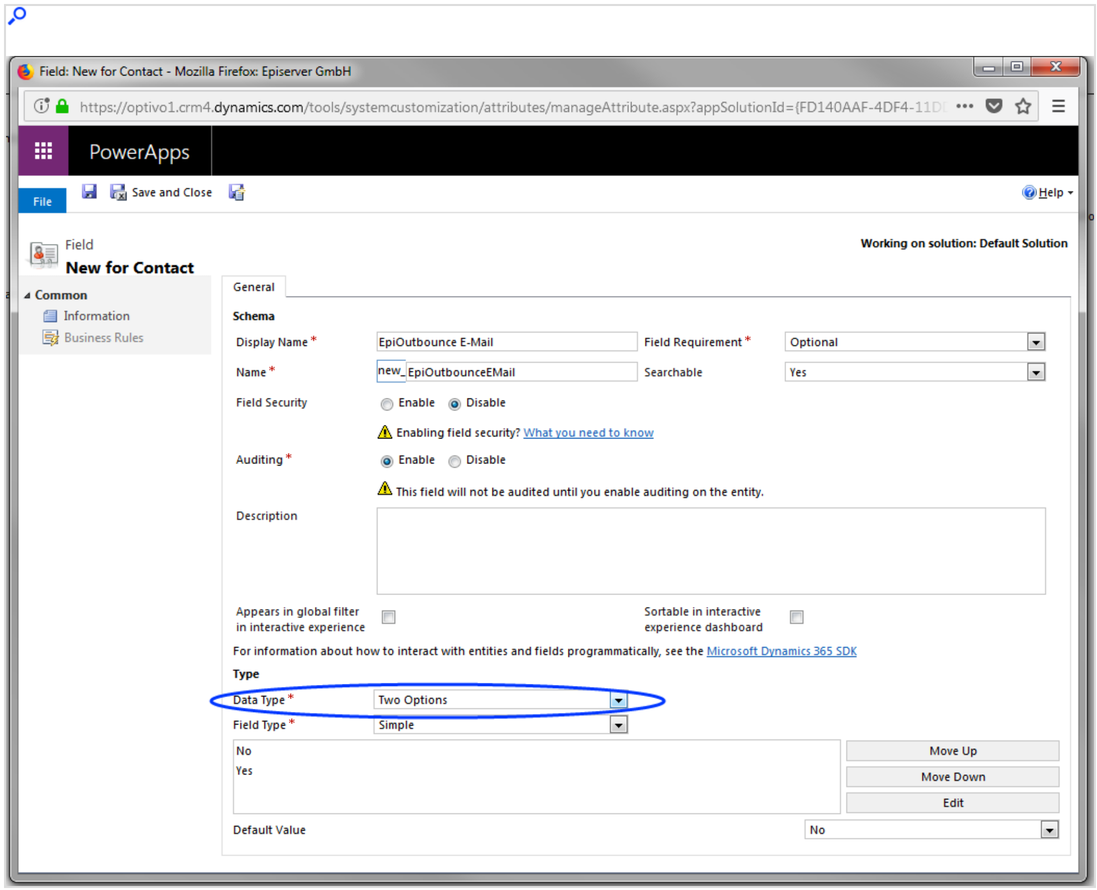
6. Specify the following fields:



- **Display Name**. Enter an intuitive name, for example *EpiOutbounce E-Mail*.
- **Name**. Click into any other field. The entry is automatically copied to the **Name** box (without spaces or special characters), with the prefix *new_* added. Change the automatically created entry in the **Name** box, such as changing it to *new_epi-outbounce eMail*. Do not use spaces or special characters. Note the entry in the **Name** box, you will need this later for the advertising consent.

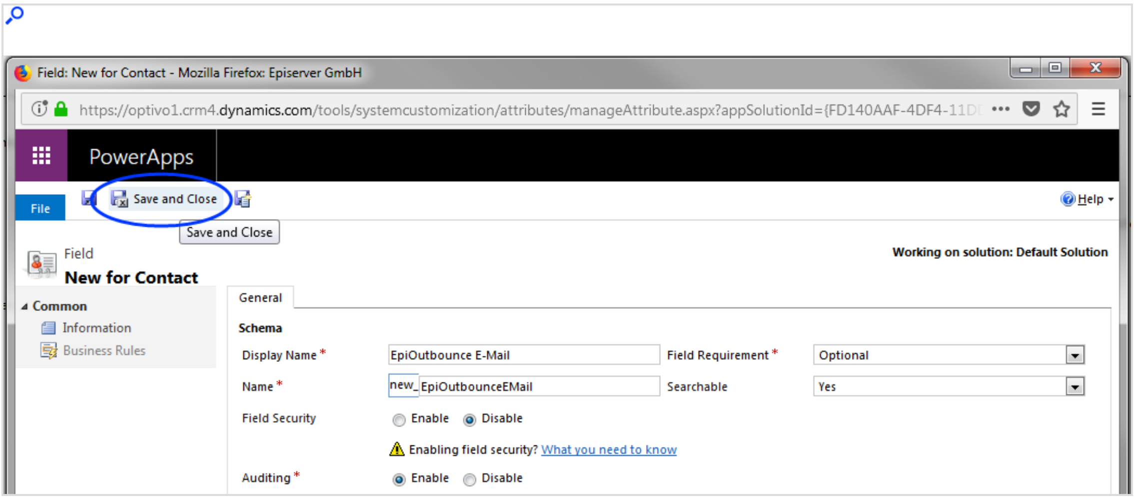


- **Field Requirement**: Select **Optional**.
- **Searchable**: Select **Yes**.
- **Field Security**. Select **Disable**.
- **Auditing**. Select **Enable**.
- **Description**. Optional: Enter a field description.
- **Data Type**. Select **Two Options**. A field containing the options **No** and **Yes** appears.



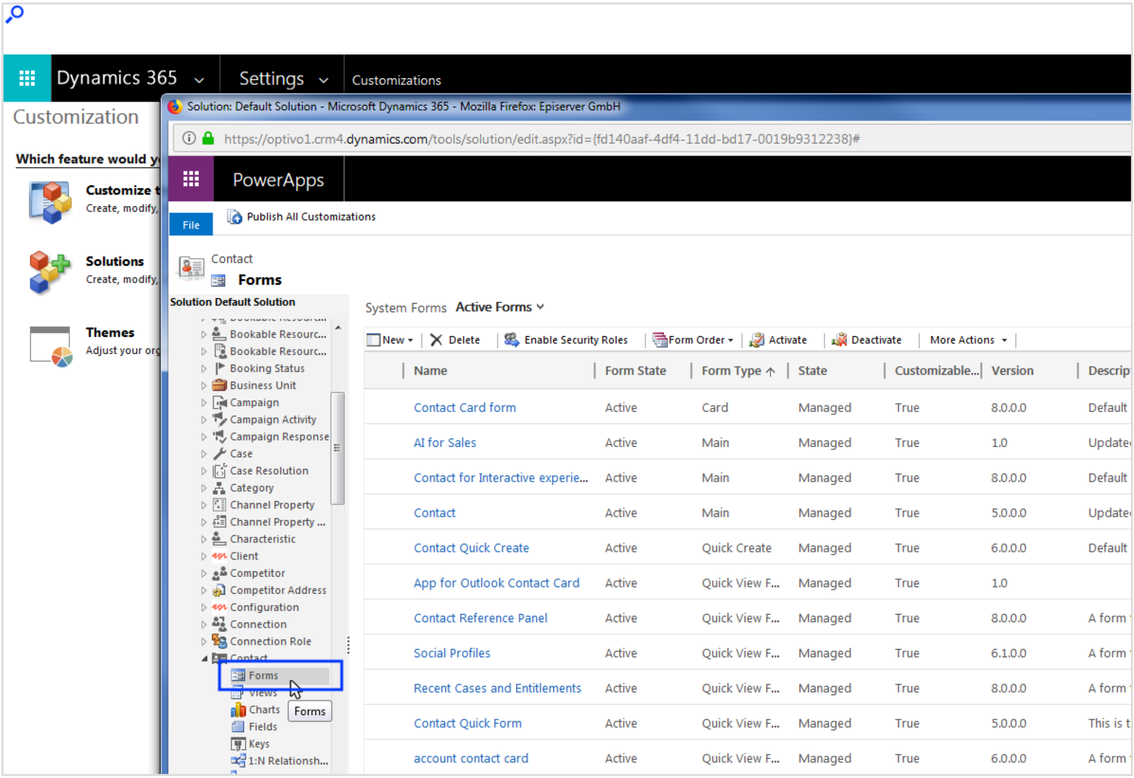
- **Field Type**. Select **Simple**.

7. Click **Save and Close**.

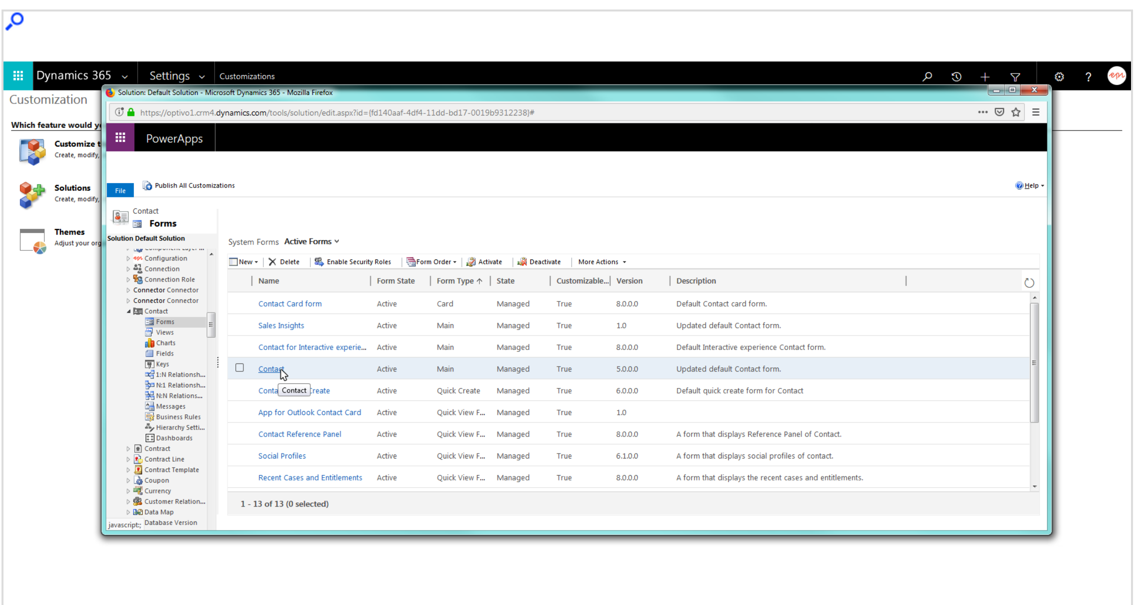


Adding the bounce status field to a form

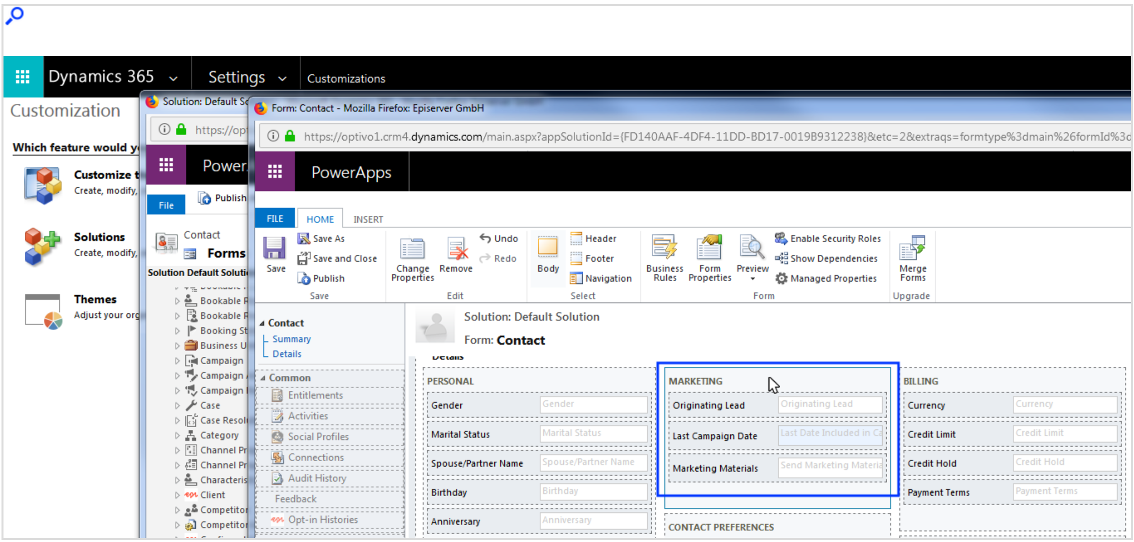
1. Use the side navigation to go to **Components** > **Entities** > **Contact** or **Lead** or **Account** > **Forms**.



2. Click the form for which you want to add the advertising consent presence field.

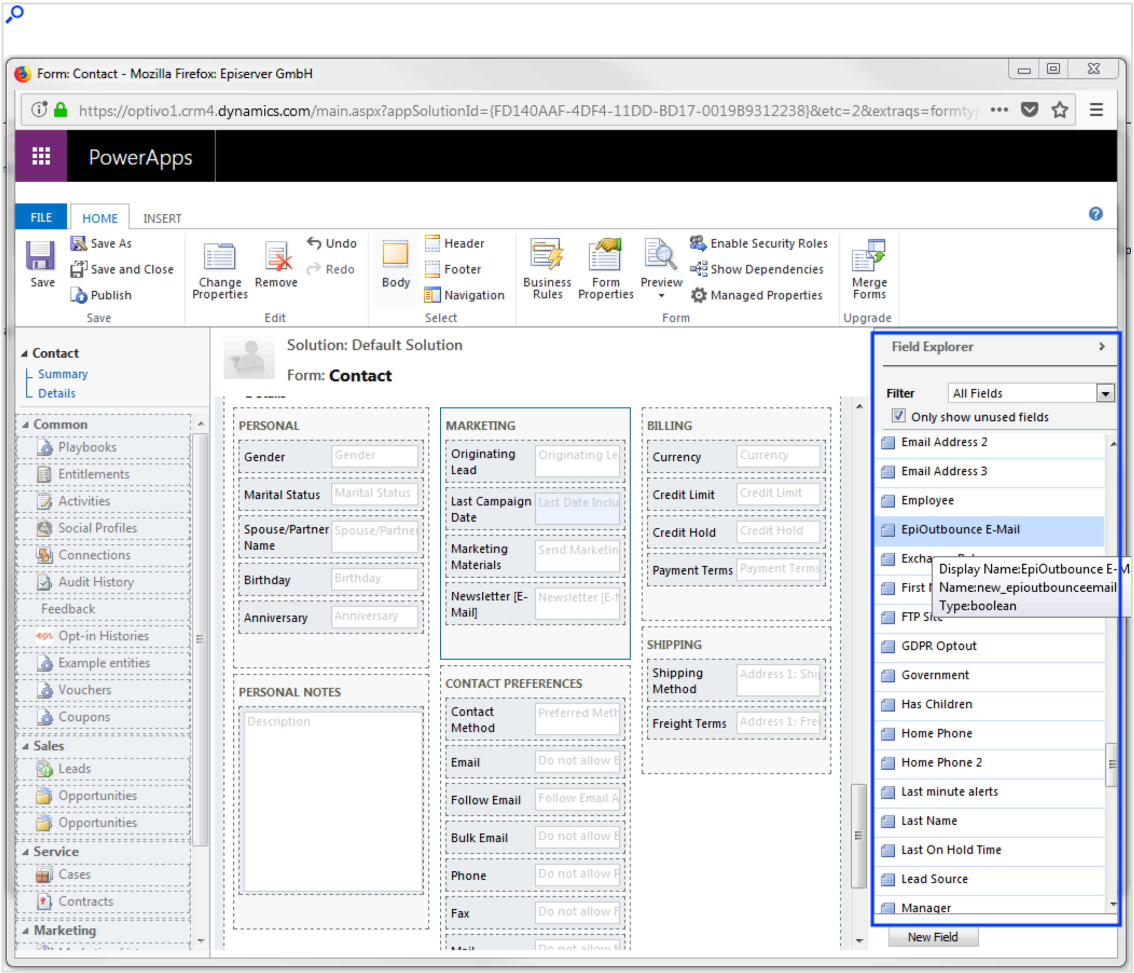


3. Click the area, for example **Marketing**, where the field for presence of advertising consent should appear. When the area is selected, the surrounding dashed line becomes solid.

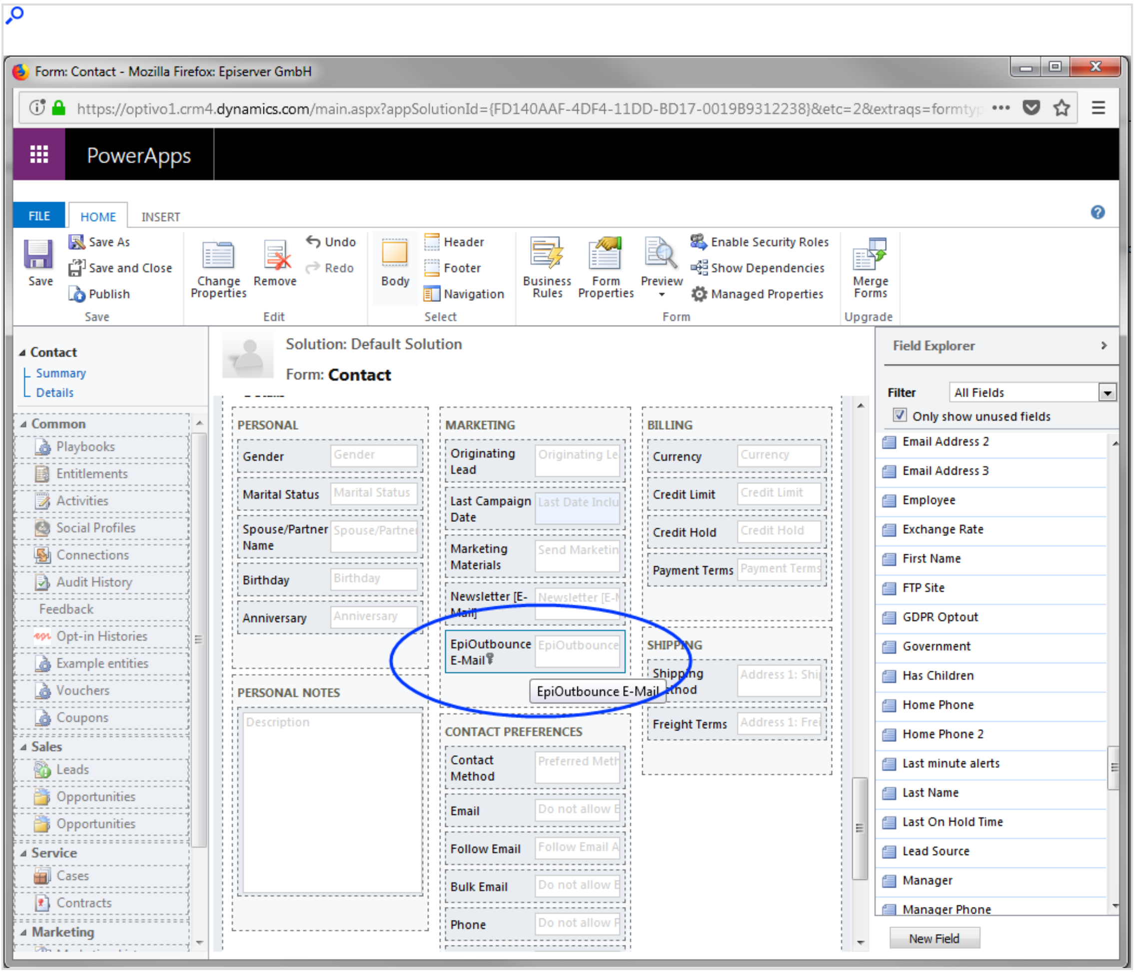


4. On the right, open the **Field Explorer** and browse for the field you created for the advertising consent presence.

> **Tip:** You can filter the number of fields shown.


Form: Contact - Mozilla Firefox: Episerver GmbH
PowerApps
Solution: Default Solution
Form: Contact
Field Explorer
Filter
All Fields
Only show unused fields
Email Address 2
Email Address 3
Employee
EpiOutbounce E-Mail
Display Name:EpiOutbounce E-M
Name:new_epioutbounceemail
Type:boolean
GDPR Optout
Government
Has Children
Home Phone
Home Phone 2
Last minute alerts
Last Name
Last On Hold Time
Lead Source
Manager
New Field

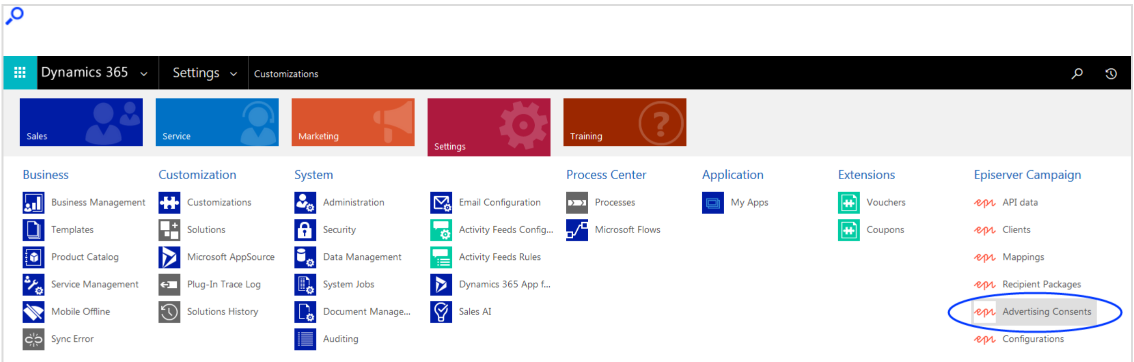
5. Double-click the advertising consent field to add it to the selected area.



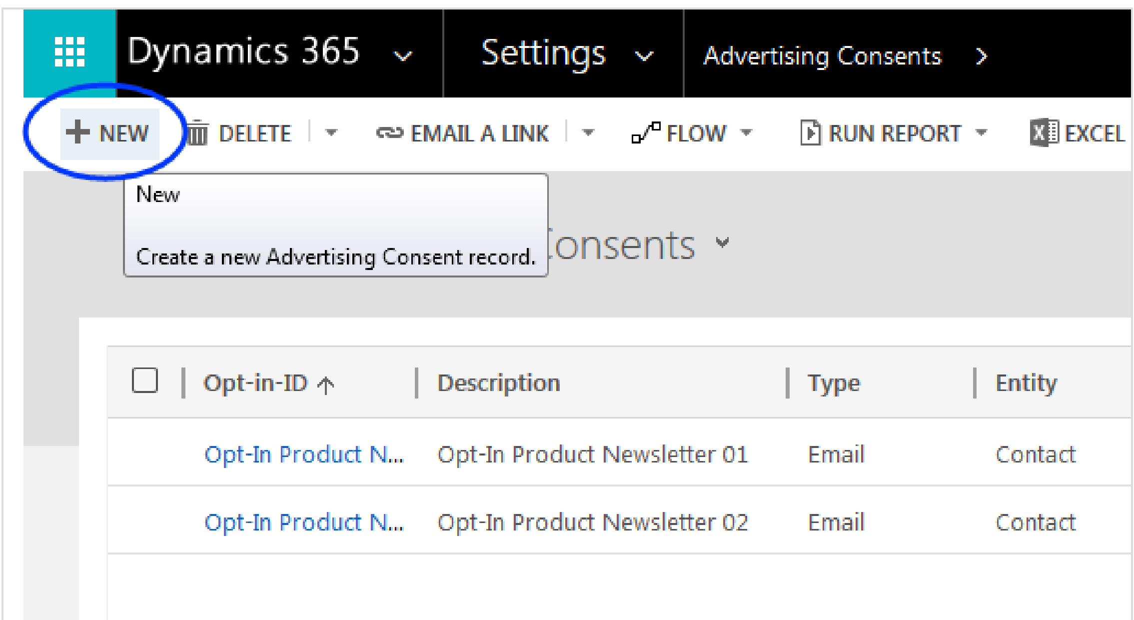
6. Click **Safe**.
7. Click **Publish**.

Creating advertising consent and associating the bounce status field

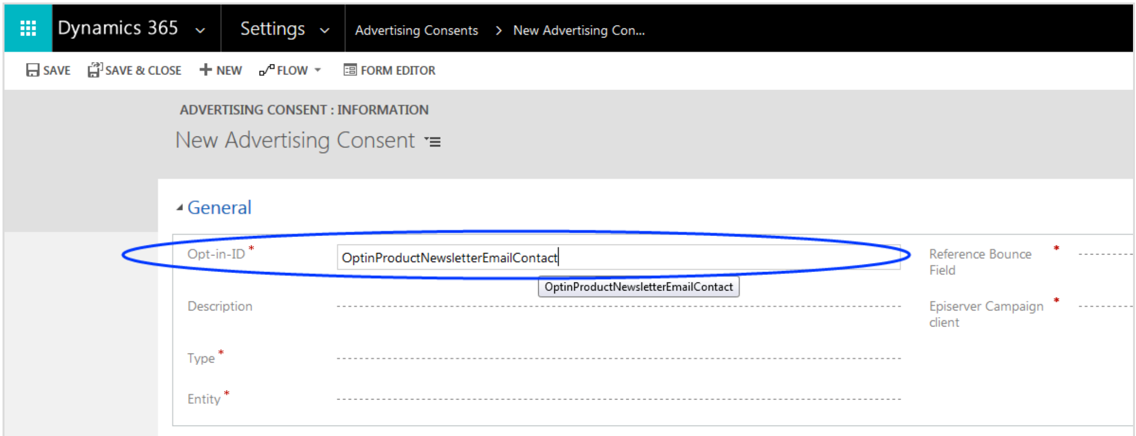
1. Open Microsoft Dynamics CRM and select **Settings** > **Advertising Consents**.



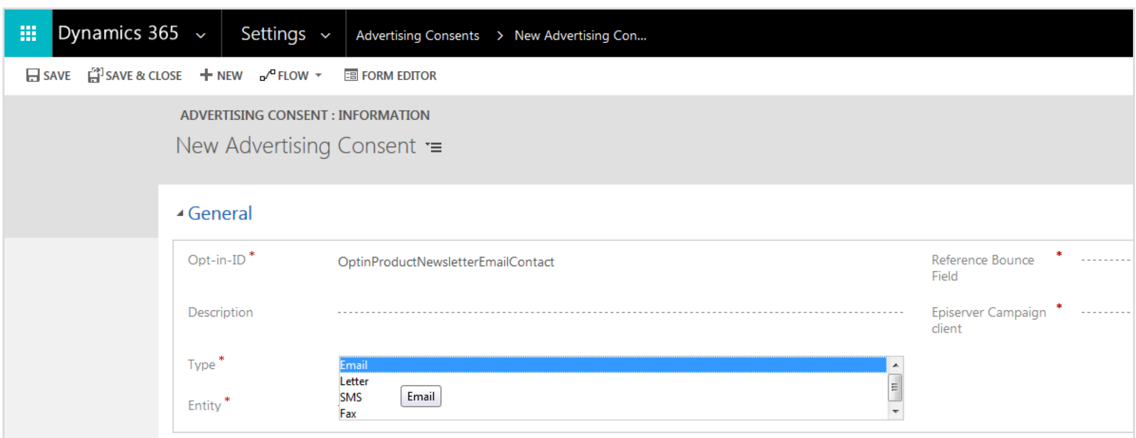
2. Click **New**.



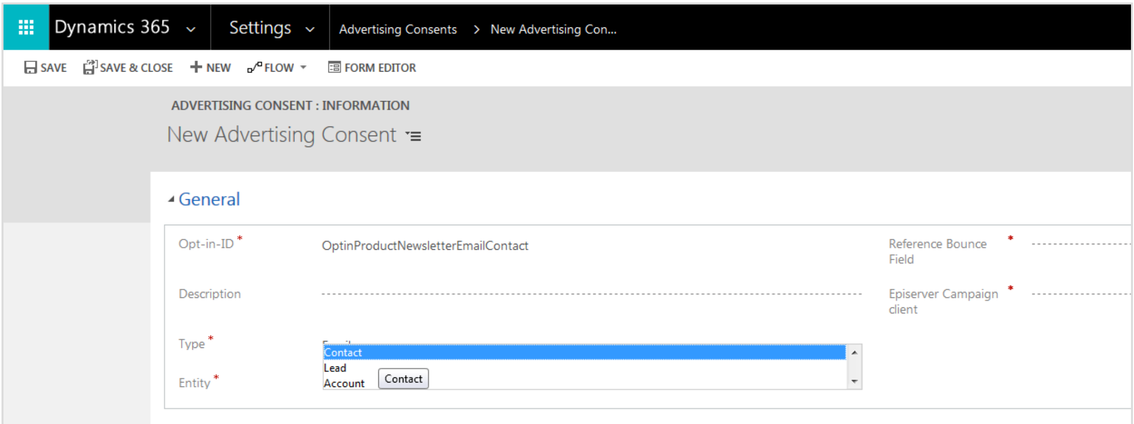
3. For **Opt-in-ID**, enter a unique identifier. Do not use special characters or characters with accents. The Opt-in-ID should be intuitive, for example *Opt-inProductNewsletterEmailContact*. It will display, for example, when selecting advertising consent for sending a campaign.



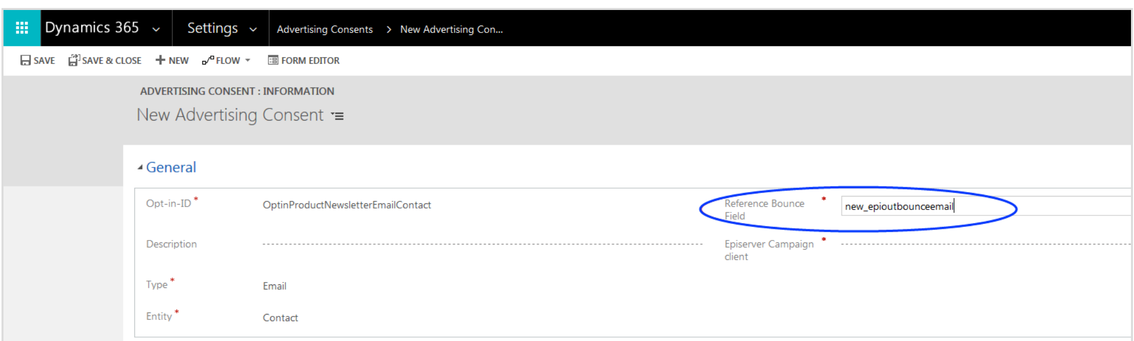
4. Optional: For **Description**, enter a description for the advertising consent.
5. For **Type**, select the communication channel (email, SMS) to which the advertising consent applies.



6. For **Entity**, select the customer type (**Contact** or **Lead** or **Account**) for which the advertising consent is used.

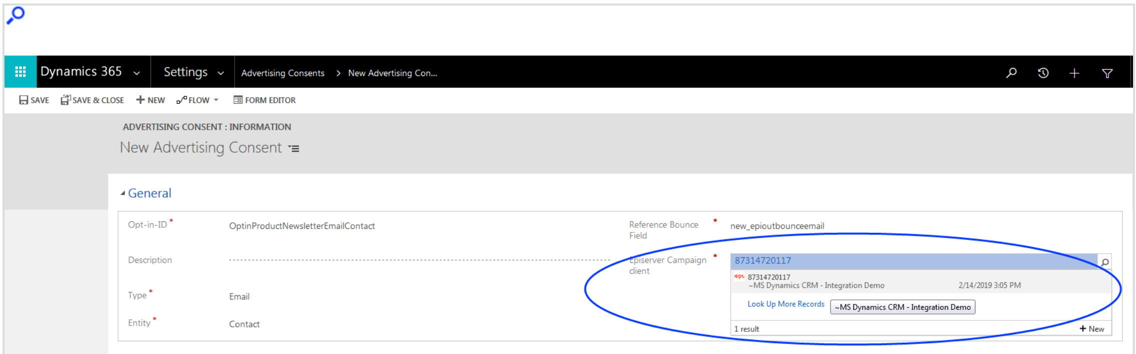


7. For **Reference Bounce Field**, enter the name of the field indicating the functionality of the advertising consent. This is the name that automatically had *new_* added when creating the field.

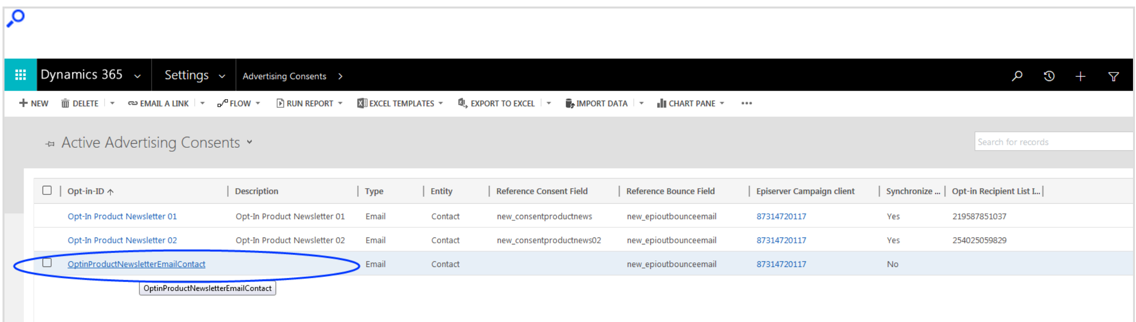


8. For **Episerver Campaign client**, select the client used for sending the advertising consent by clicking the magnifying glass symbol.

> **Note:** The allocation of a client to an advertising consent cannot be changed.

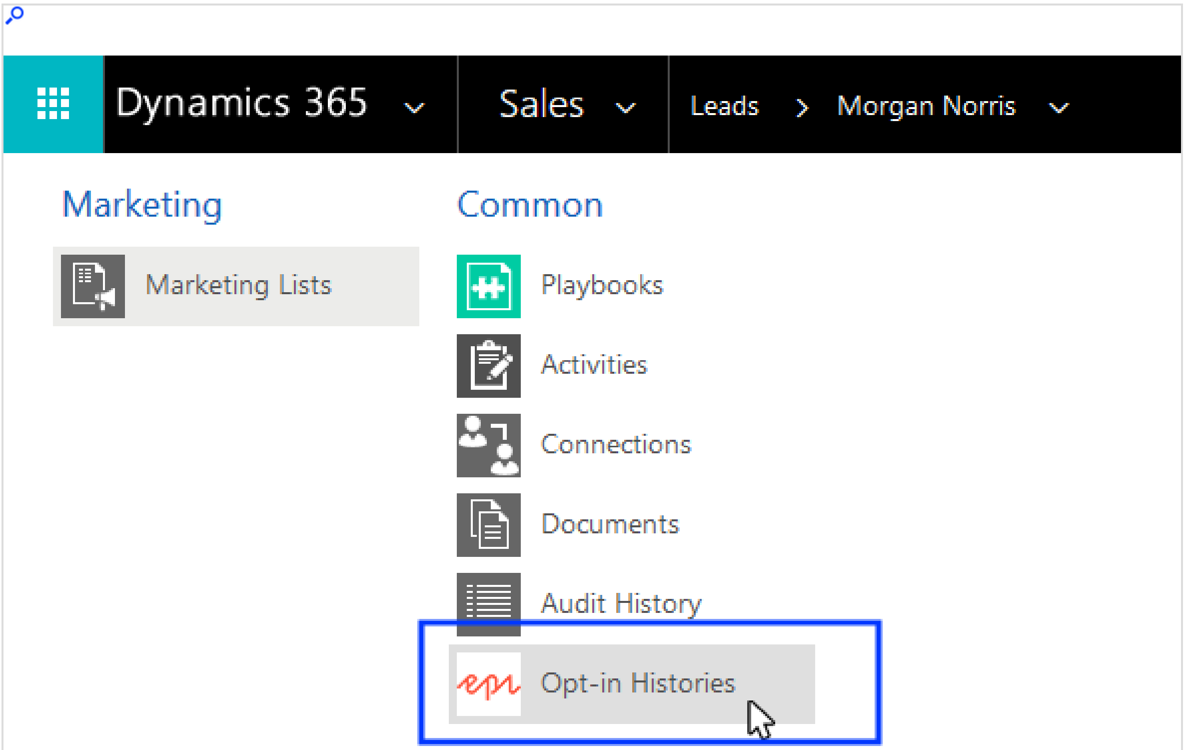


9. Click **Save & Close**. The new advertising consent is displayed in the overview list.

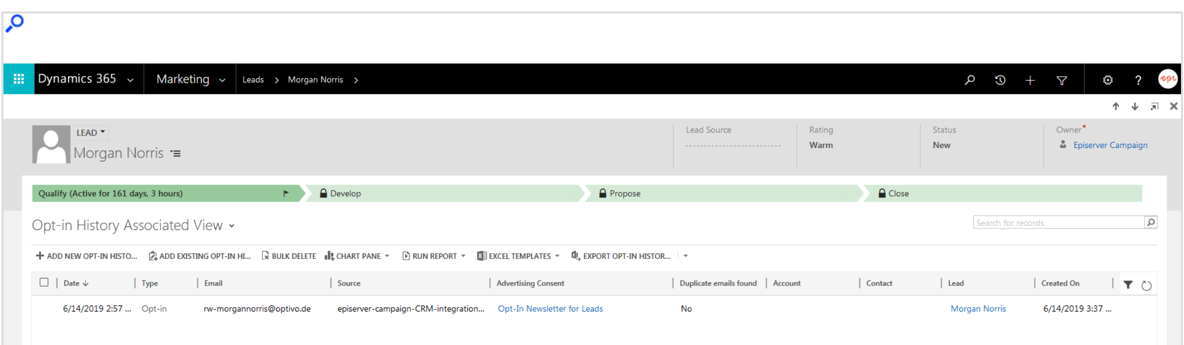


Repeat steps 1–9 to add more advertising consents for the same channel. Additional advertising consents can refer back to the bounce status field that was already created. This applies to the entire channel, for example an **Email** channel.

You have successfully created an advertising consent. Irrespective of whether the agreements are obtained through an opt-in process in Optimizely Campaign or from another source, you will find the assignment of the advertising consents to the individual contacts, leads or accounts under the menu item **Opt-in Histories**.



In the **Opt-in History Assigned View** overview, you can see the advertising consents granted. If the advertising consent is withdrawn again, the entry can be deleted, or an **Opt-out** entry is created on basis of the unsubscribe response data. In this case, CRM uses the time stamp to recognize the current status of the withdrawn advertising consent. In both cases, no more mailings that require the corresponding consent are sent to this data record.



Connecting the advertising consent to an Optimizely Campaign opt-in process

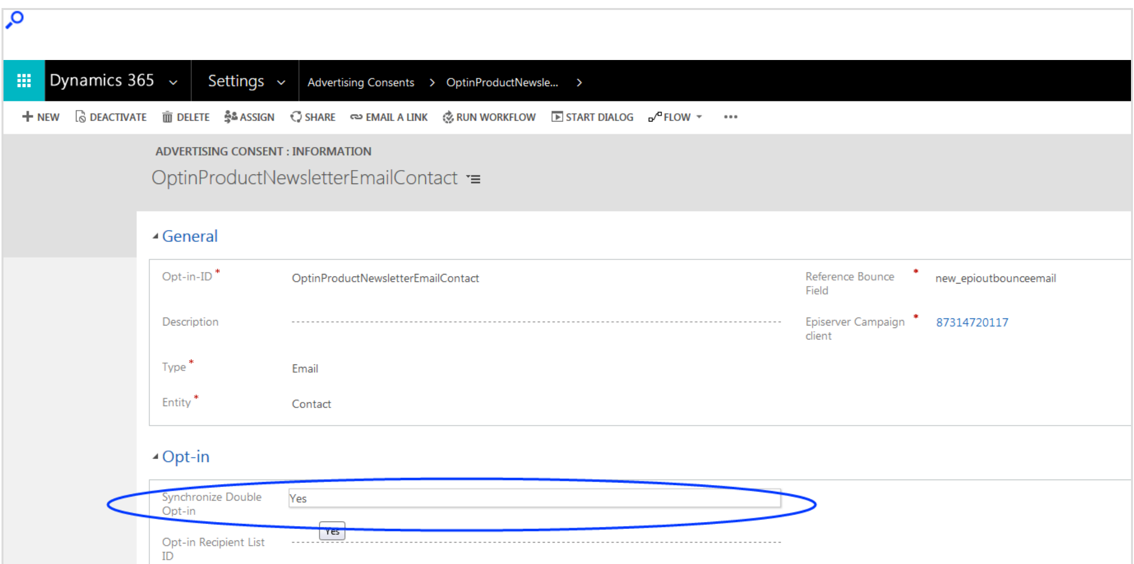
On the configuration page of the advertising consent, you find another **Opt-in** area where you can can connect the created advertising consent to the opt-in process in Optimizely Campaign. This enables you to send opt-in mailings with a confirmation link via Optimizely Campaign.

Prerequisites:

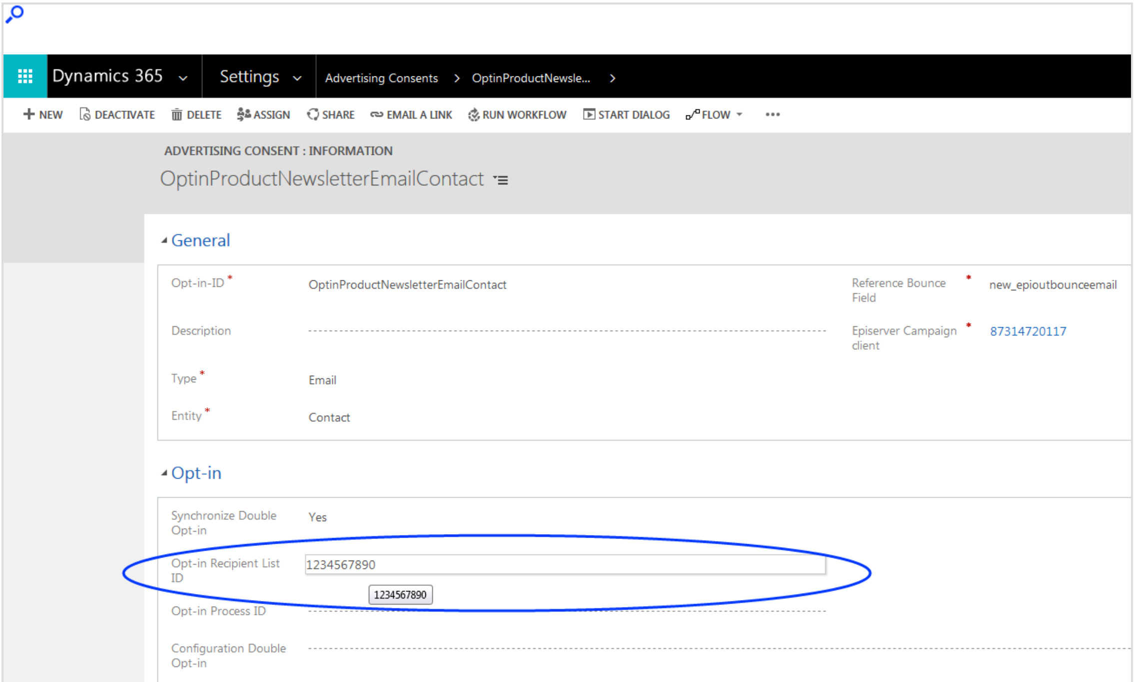
- You completed configuring the integration, including an advertising consent.
- You created an opt-in process. You require the ID of the opt-in process and the ID of the opt-in recipient list used in the process.

To connect an advertising consent to a double opt-in process:

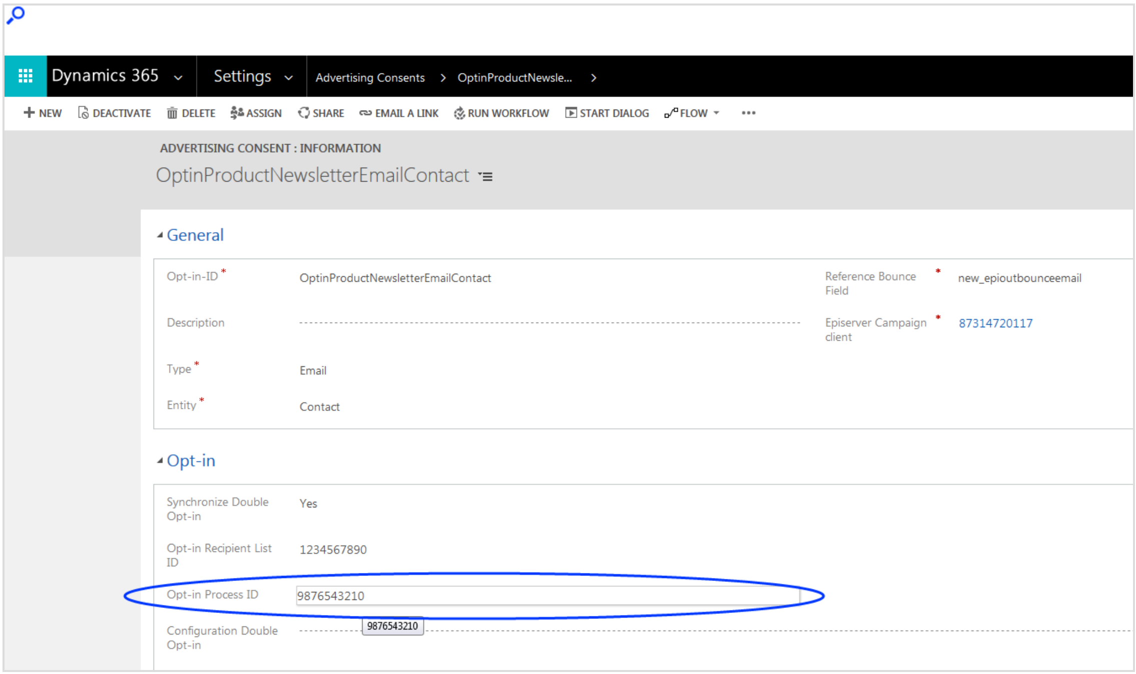
1. In the **Opt-in** area, in the **Synchronize Double Opt-in** field, select **Yes**.



2. In the **Opt-in Recipient List ID** field, enter the ID of the recipient list that is used in the opt-in process. To see the recipient list ID, open the Optimizely Campaign menu and select **Administration** > **API overview** > **Recipient lists**.

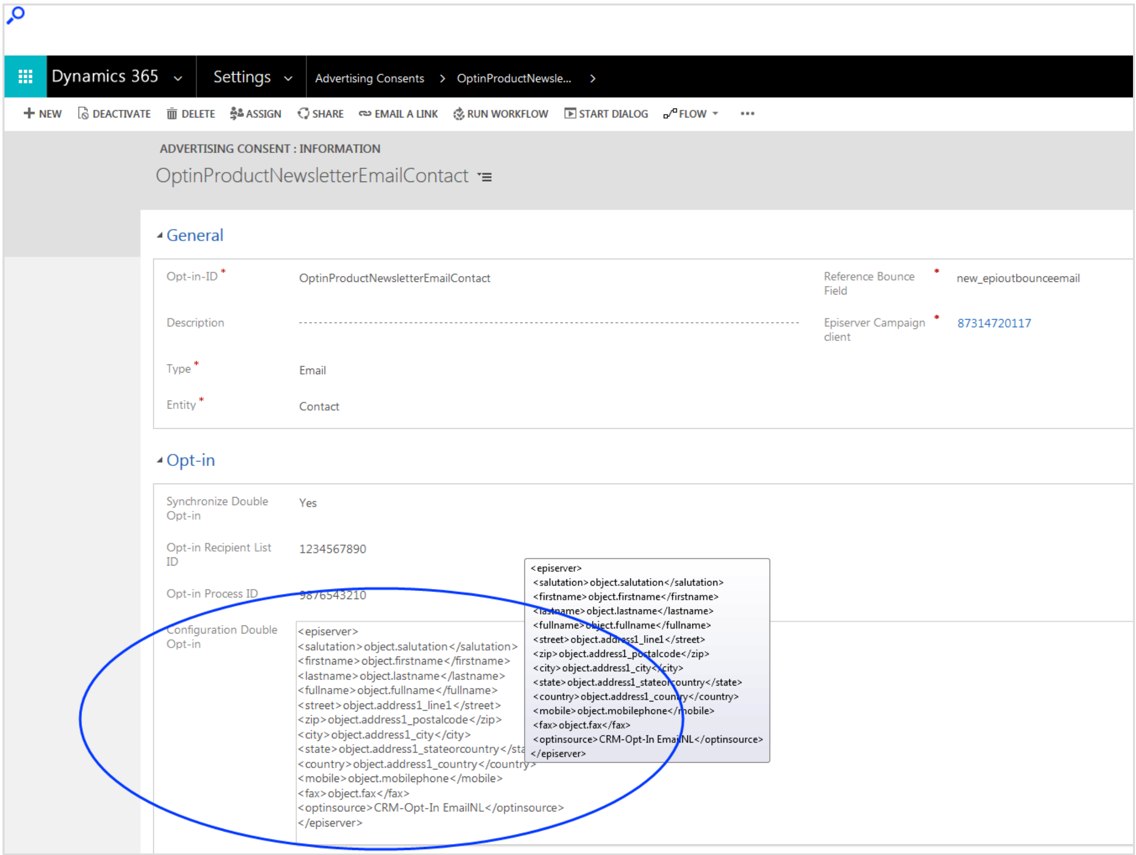


3. In the **Opt-in Process ID** field, enter the ID of the Opt-in process from Optimizely Campaign. To see the opt-in ID, open the Optimizely Campaign menu and select **Administration** > **API overview** > **Opt-in processes**.

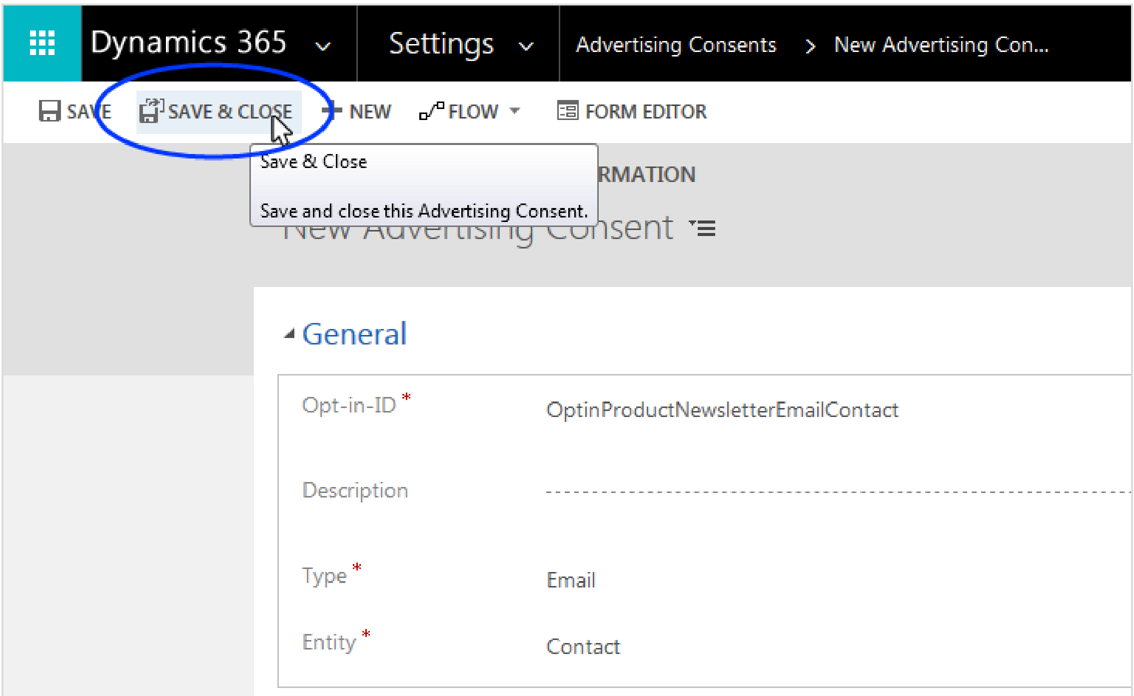


4. Optional: In the **Konfiguration DOI field**, enter a XML configuration that assigns information from the contact fields to the recipient list fields in the opt-in recipient list.

> **Note:** The entry in `<optinsource>` is freely customizable. Note that the root node is named `<episerver>` here.



5. Click **Save & Close**.



You have successfully combined an advertising consent in CRM with an opt-in process in Optimizely Campaign. You can now trigger the sending of an opt-in mailing via Optimizely Campaign by clicking the **Send Opt-in Mail** button in the respective entity.

Customizing the campaign activity form

To complete the configuration, update the campaign activity form adding fields from the Microsoft Dynamics integration. These fields are usually added when the integration is installed. However, depending on your CRM configuration, this step may have been missed.

The integration has these fields:

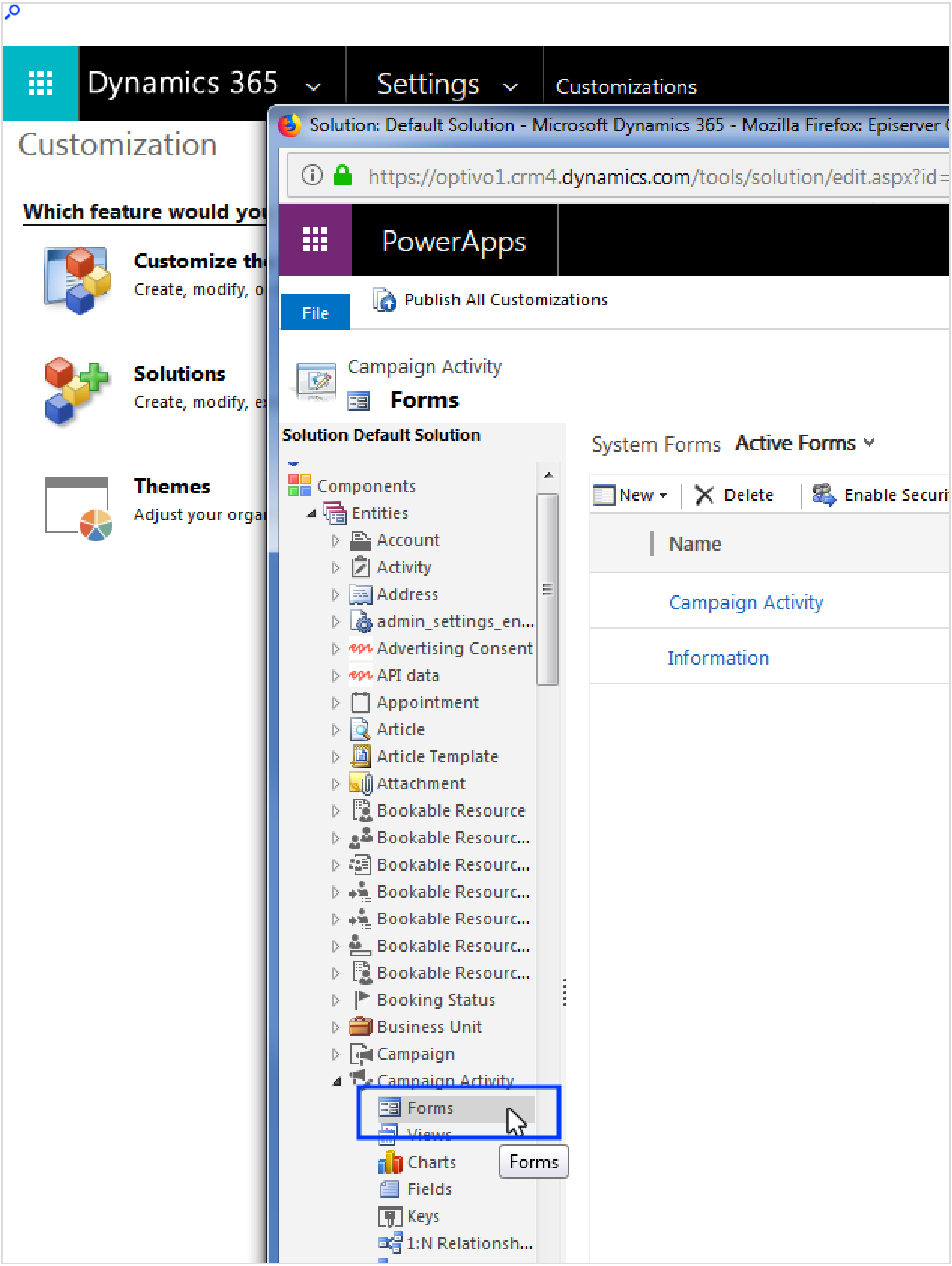
No.	Field name
1	Recipients sent to Optimizely Campaign

No.	Field name
2	Sent successful
3	Recipient Packages created
4	Mailing Description
5	Mailing ID
6	Mailing ID by Wave ID
7	Mailing name
8	Mailing Status
9	Optimizely Campaign client
10	Recipient Packages sent
11	Preprocessed recipients
12	Wave ID
13	Advertising Consent

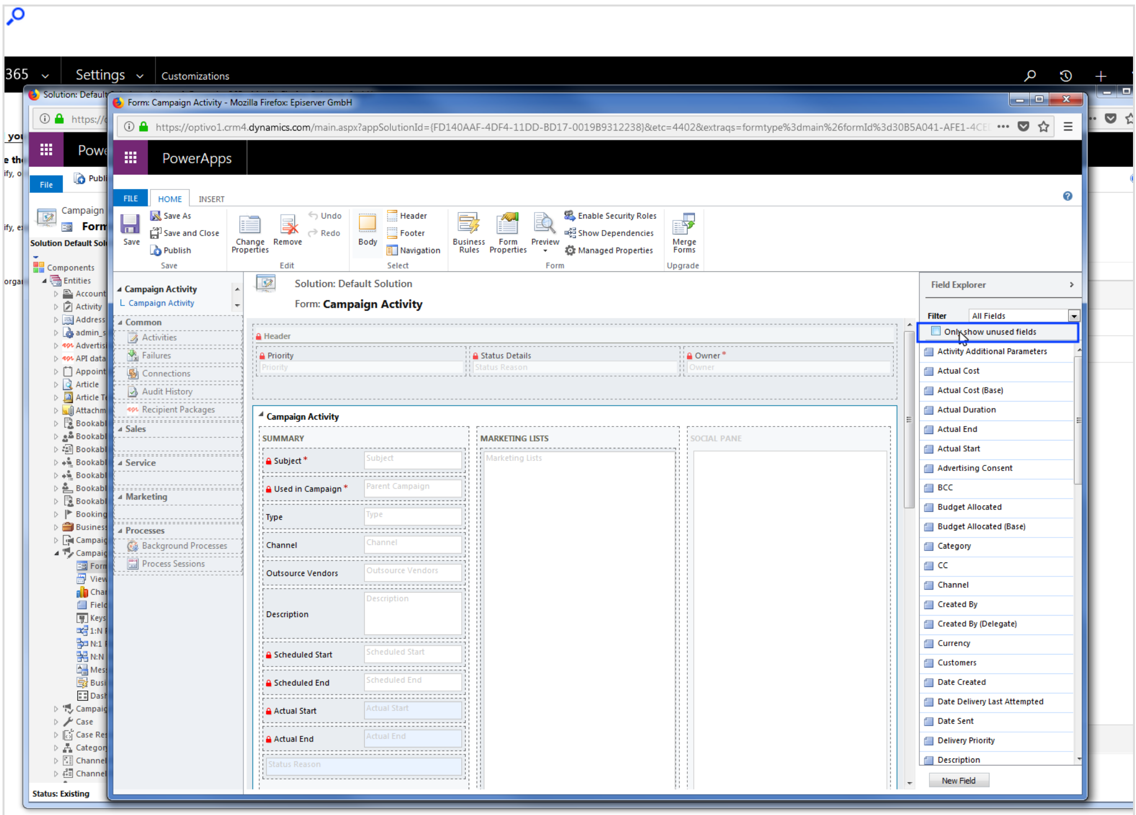
Do the following:

1. In Microsoft Dynamics, go to **Settings** > **Customizations**.
2. Click **Customize the System**.

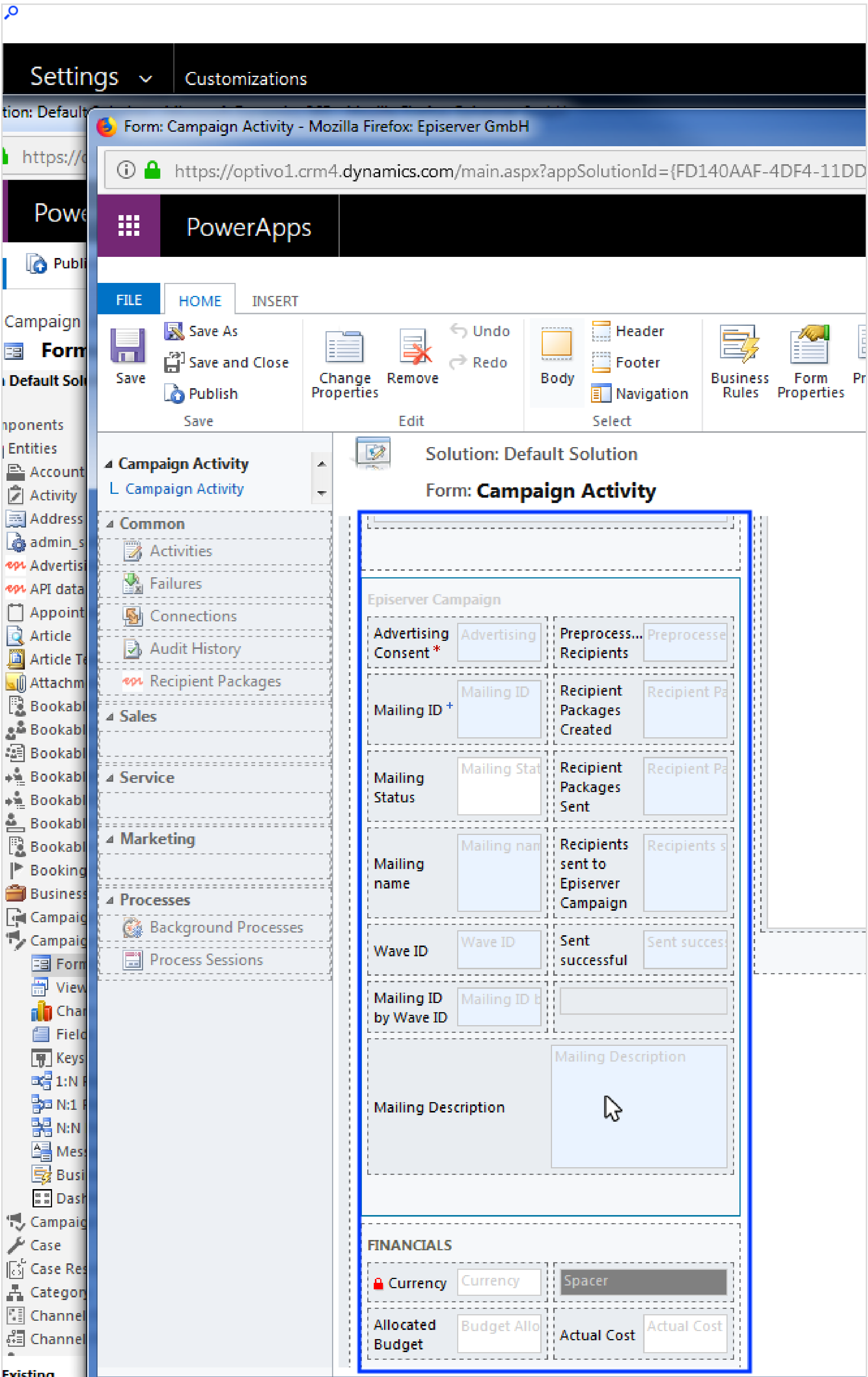
3. Select **Components** > **Entities** > **Campaign Activity** > **Forms**.


Dynamics 365
Settings
Customizations
Customization
Which feature would yo
Customize th
Create, modify, o
Solutions
Create, modify, e
Themes
Adjust your orga
Solution: Default Solution - Microsoft Dynamics 365 - Mozilla Firefox: Episerver
https://optivo1.crm4.dynamics.com/tools/solution/edit.aspx?id=
PowerApps
File
Publish All Customizations
Campaign Activity
Forms
Solution Default Solution
Components
Entities
Account
Activity
Address
admin_settings_en...
Advertising Consent
API data
Appointment
Article
Article Template
Attachment
Bookable Resource
Bookable Resourc...
Booking Status
Business Unit
Campaign
Campaign Activity
Forms
Views
Charts
Fields
Keys
1:N Relationsh...
System Forms Active Forms
New
Delete
Enable Securi
Name
Campaign Activity
Information

4. Click **Campaign activity** in the list to open the **Campaign Activity** form.
5. In the field explorer, from the **Filter** drop-down list, select **Custom Fields** and clear the **Only show unused fields** check box. The 13 fields from the Microsoft Dynamics Integration are shown.



6. Drag the 13 fields into the **Episerver Campaign** area of the structure view of the form.


Settings
Customizations
Form: Campaign Activity - Mozilla Firefox: Episerver GmbH
https://optivo1.crm4.dynamics.com/main.aspx?appSolutionId={FD140AAF-4DF4-11DD
PowerApps
FILE
HOME
INSERT
Save
Save As
Save and Close
Publish
Change Properties
Remove
Undo
Redo
Edit
Body
Header
Footer
Navigation
Select
Business Rules
Form Properties
Campaign Activity
Common
Activities
Failures
Connections
Audit History
Recipient Packages
Sales
Service
Marketing
Processes
Background Processes
Process Sessions
Solution: Default Solution
Form: Campaign Activity
Episerver Campaign
Advertising Consent *
Preprocess... Recipients
Mailing ID
Recipient Packages Created
Mailing Status
Recipient Packages Sent
Mailing name
Recipients sent to Episerver Campaign
Wave ID
Sent successful
Mailing ID by Wave ID
Mailing Description
FINANCIALS
Currency
Spacer
Allocated Budget
Actual Cost

7. Click **Save and Close**.

Transferring data fields

When transferring data fields from the CRM to Optimizely Campaign, a distinction is made between data fields transferred by default and additional optional fields that must be configured.

> **Note:** The integration transmits all values as a string, regardless of which data type is created in CRM.

Data fields transferred by default

The default settings for the integration send the following data from Microsoft Dynamics to Optimizely Campaign:

Field name	Date type	Description
entityType	String	Indicates whether this is a lead or a contact
salutation	String	Title
firstname	String	First name
lastname	String	Last name
fullname	String	First name and last name
mobile	String	Mobile phone number (required for SMS campaigns)
email	String	Email (required for email campaigns)
street	String	Street
city	String	City

Field name	Date type	Description
state	String	State
zip	String	Zip code
country	String	Country

Configuring additional fields for the recipient list

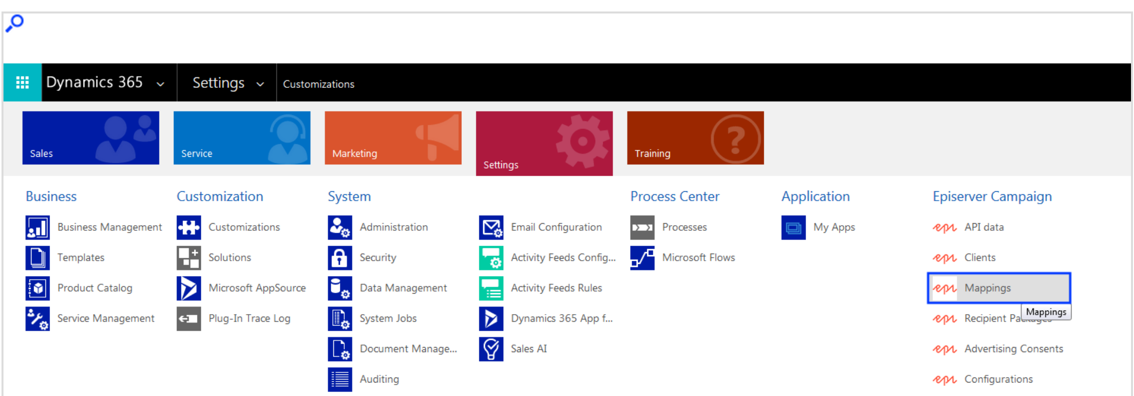
This configuration applies to both campaign management and synchronization of recipient lists and advertising consents (clients). Remember to consider this during planning to avoid costly reconfiguration and additional work. The field configurations must be identical for both **leads** and **contacts**. Changing only one type will cause the other to fail to send.

Options for custom configuration of recipient lists:

- **Remap** a custom CRM field and write it to an existing standard field in the recipient list.
- **Transfer** a custom CRM field to an additional field not in the standard configuration of the recipient list .

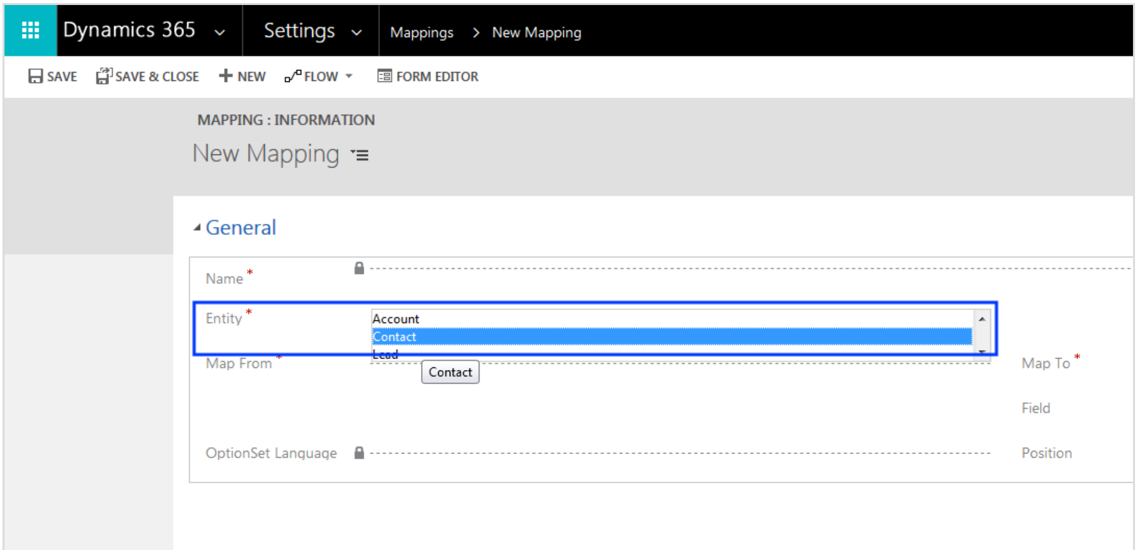
Remapping CRM fields

1. Open Microsoft Dynamics CRM and select **Settings** > **Mappings**.

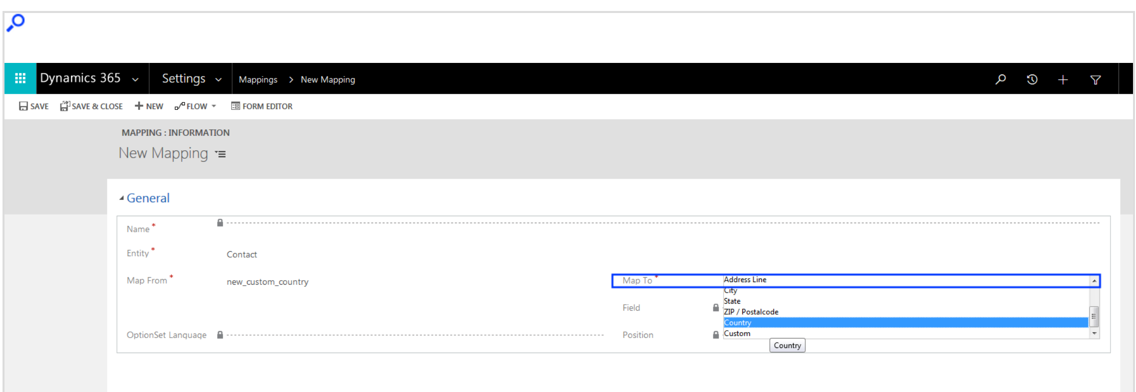


2. Click **New**.

3. For **Entity**, select the type **Contact**.



4. In the **Map From** box, enter the name of the field in CRM.
5. For **Map To**, select the standard field in the recipient list into which the value of the CRM field should be written. For example, if you created a field called *new_custom_country*, then you can copy the value of this field into the **Country** field in the recipient list. The standard CRM **Country** field is no longer transferred to Optimizely Campaign.



6. Click **Save**.

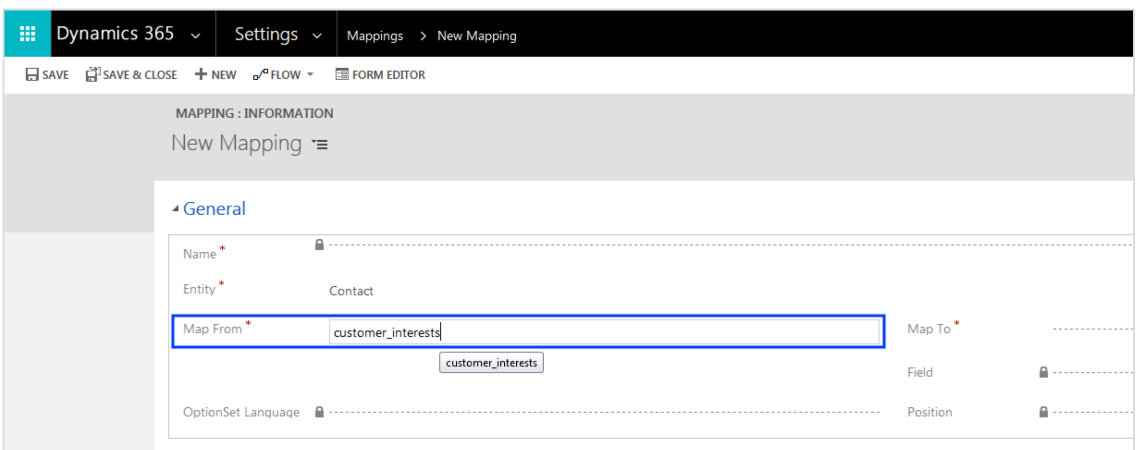
Repeat steps 1–6 for type **Lead** (at step 3, select **Lead** under **Entity**).

Transferring CRM fields

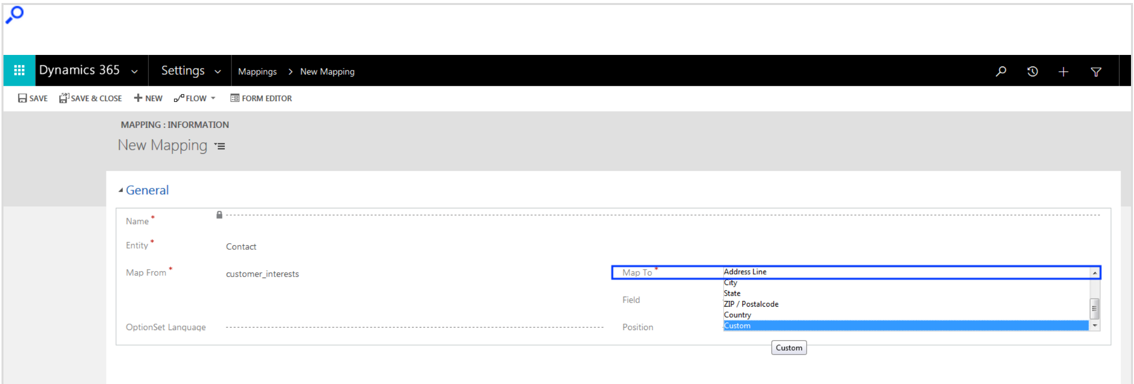
Prior to transferring, contact customer support to add the additional fields to your recipient list. In the request, provide the fields in a consecutively numbered list starting at 1, including numbering and field names. Note the numbering and field names (do not change them), you will need these for the configuration.

Do the following when the fields have been added:

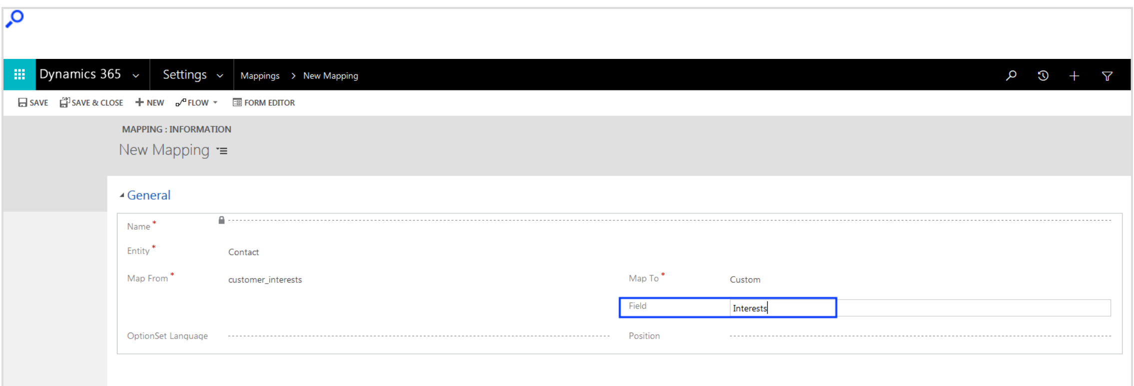
1. Go to **Settings** > **Episerver Campaign** > **Episerver Campaign Mappings** in Microsoft Dynamics CRM.
2. Click **New**.
3. For **Entity**, select **Contact**.
4. In the **Map From** box, enter the name of the CRM field.



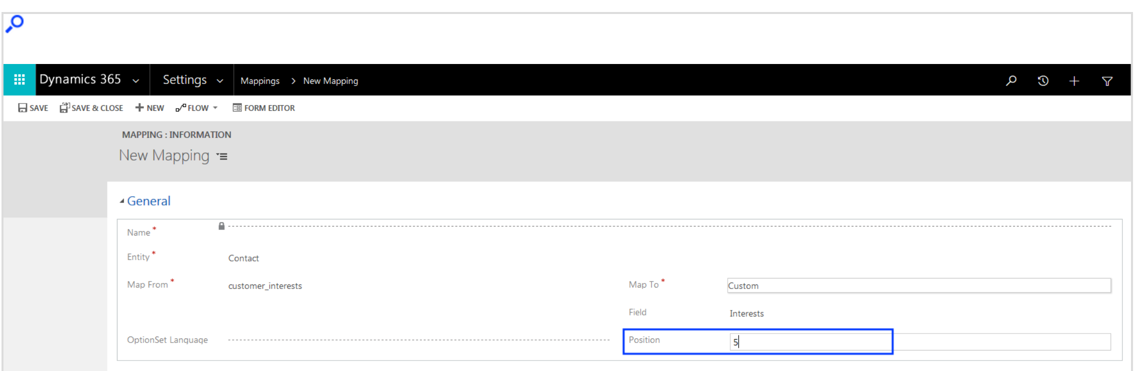
5. For **Map To**, select **Custom**.



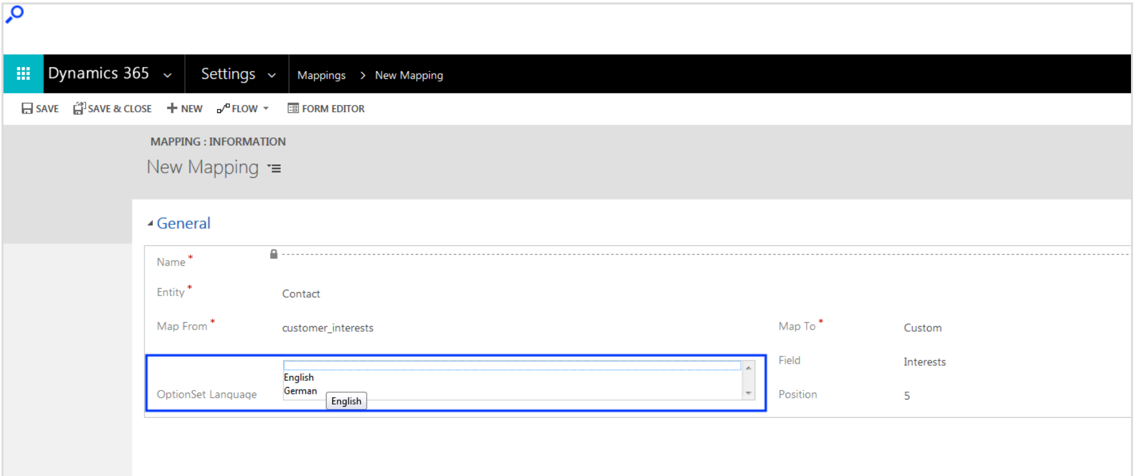
6. In the **Field** box, enter the name of the additional recipient list field requested.



7. In the **Position** box, enter the position number of the additional recipient list field. The position numbers are oriented to the order of the additional recipient list fields requested.



8. If the **Map From** field is of the OptionSet type, use **OptionSet Language** to select the language to use to transfer the values.



9. Click **Save**.
10. Repeat steps 2–10 for type **Lead** (at step 4, select **Lead** under **Entity**).

Sending mailings

> **Note:** This topic is for administrators and developers with administration access rights in Microsoft Dynamics.

This topic describes how to send campaign mailings directly from **Campaign Activity** in Microsoft Dynamics CRM, when using this with Optimizely Campaign. After the mailing is sent, response data (opens, clicks, direct replies, unsubscribes and outbounces) is automatically imported into CRM from Optimizely Campaign.

Prerequisites

- **Configuration** of the integration completed. See Configuration.
- The **ID of the campaign mailing** to be sent. Make a note of the mailing ID as this is required to send the mailing from CRM.

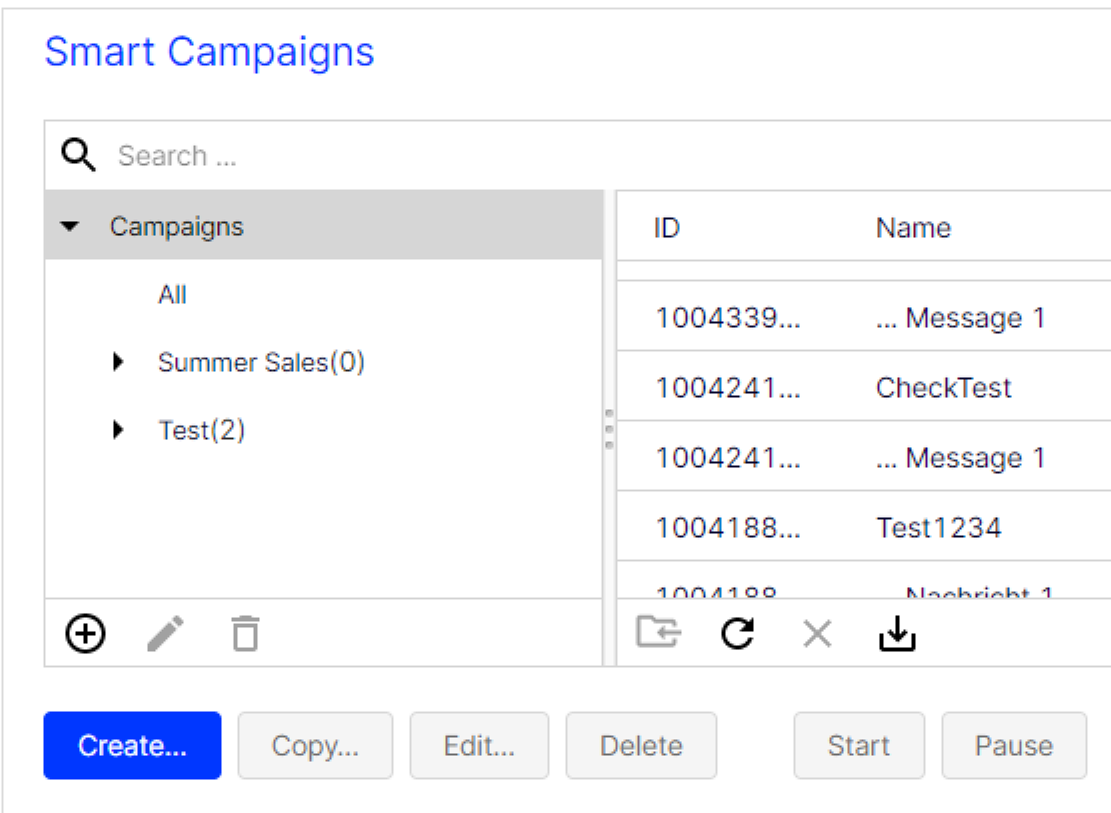
Preparing a Smart Campaign in Optimizely Campaign

The Smart Campaign set up requires at least these nodes:

- **Recipients** node, to which you assign the **Master recipient list** of the closed-loop interface. This is set up by the Optimizely customer support, when your client is configured.
- **Wait** node, to enable the **Wait until import has been finished** option.
- Message node, containing the mailing to be sent.

To configure a Smart Campaign, do the following:

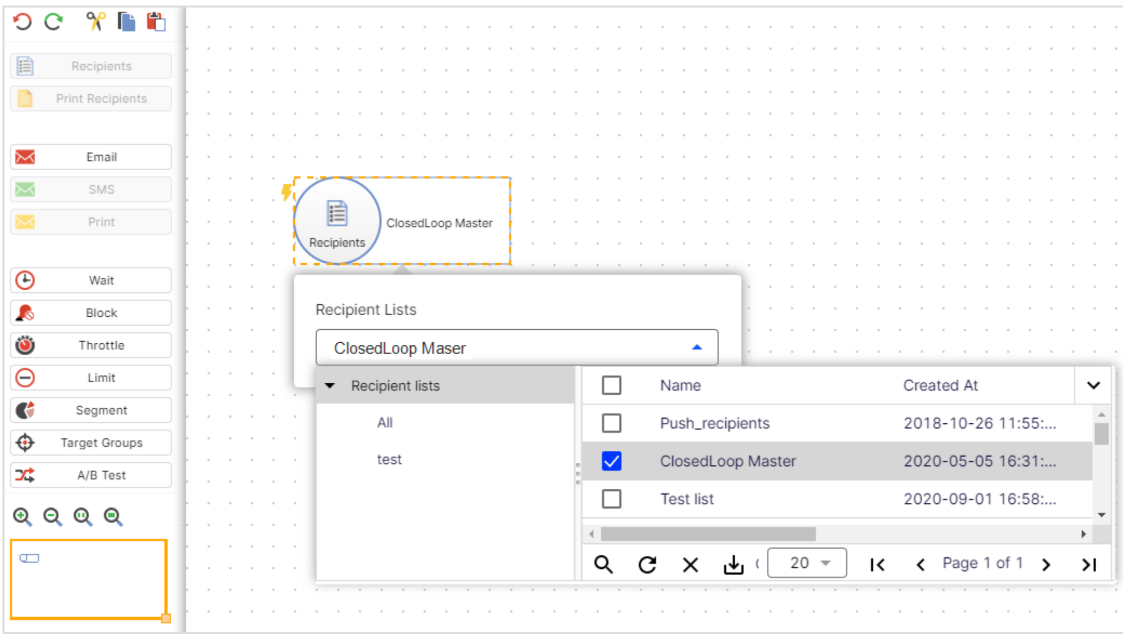
1. Open the Optimizely Campaign menu and select **Campaigns** > **Smart Campaigns**.
2. In the **Campaigns** window, click **Create...**.



3. Drag the **Recipients** node from the left action area to the working area on the right.

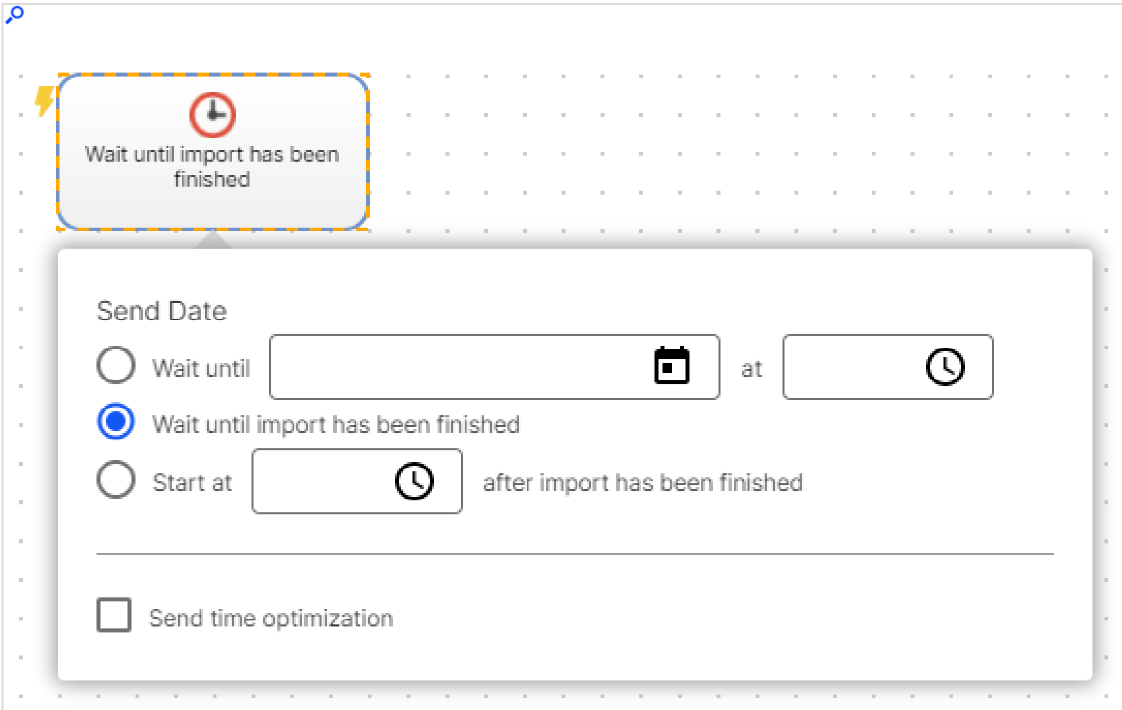
4. Select the master recipient list in the **Recipient lists** drop-down list of the context menu.

> **Note:** Only use the master recipient list and no other recipient list.



5. Drag the **Wait** node from the left action area to the working area on the right.

6. In the context menu, enable the option **Wait until import has been finished**.



7. Drag a message node (Email, SMS) from the left action area to the working area on the right.
8. Click **Edit Content...**, select a template and insert your message content into the mailing. Design your Smart Campaigns mailing as usual, using available tools and features. See Edit mailing content.
9. Click **Close**.
10. Connect the campaign nodes.
11. Click **Save and Close**, enter a campaign name and click **Save**.

> **Note:** Do not activate and send the campaign mailing. If you do, you cannot start and send it from Microsoft Dynamics CRM anymore. If you start and send the mailing from Microsoft Dynamics CRM later, the mailing is automatically duplicated. You can delete the original in Optimizely Campaign after it is sent.

Configuring marketing lists and CRM campaigns

Before sending a campaign mailing via Optimizely Campaign, you must do the following in Microsoft Dynamics CRM:

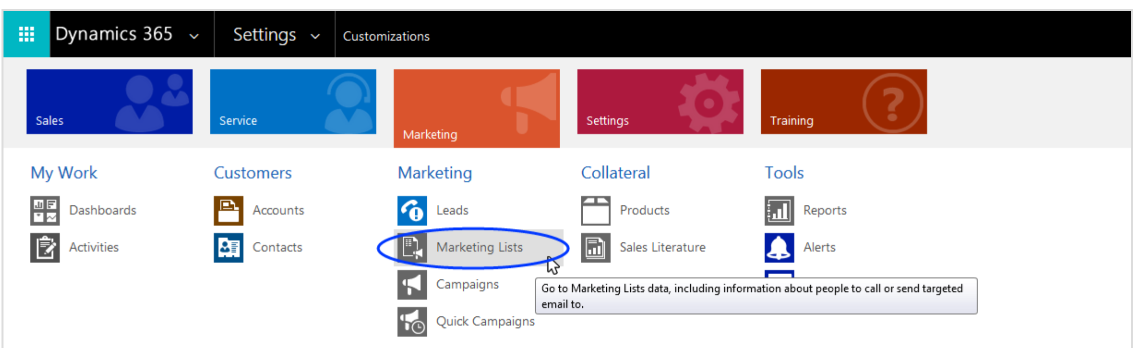
- Create a **marketing list** with leads and contacts who will receive the mailing.

> **Note:** Contacts and leads for which you do not have **advertising consent** will not receive the mailing, even if they are in the marketing list.

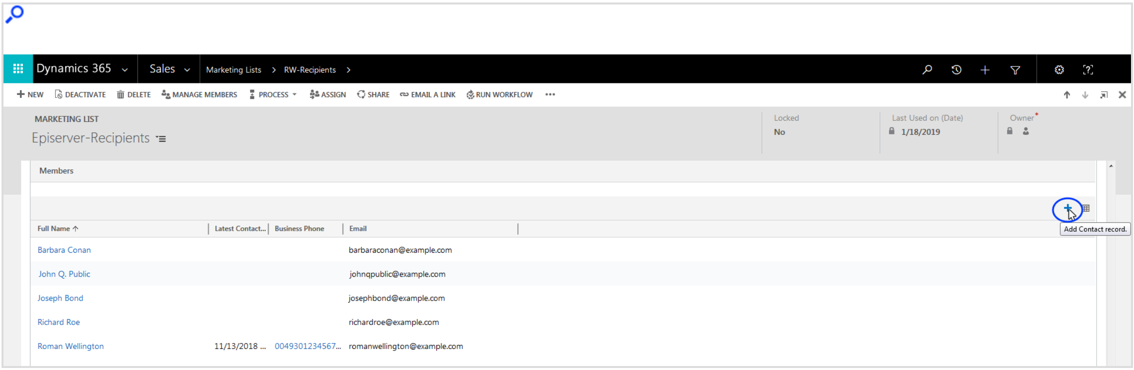
- Create a **CRM campaign** and add the marketing list.

Creating a marketing list

1. Open Microsoft Dynamics CRM and select **Marketing** > **Marketing Lists**.



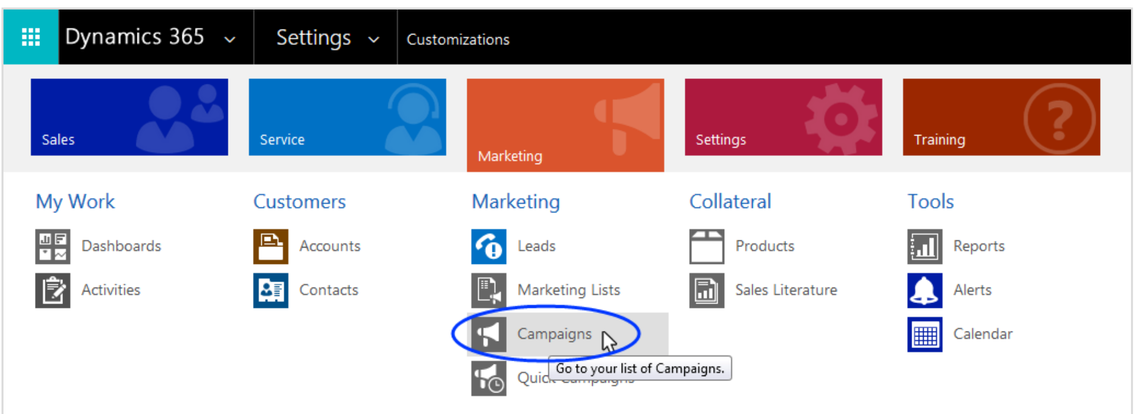
2. Click **New**. The integration supports both static and dynamic list types. The name for the marketing list and its options (such as **Currency**) are not relevant for sending mailings via Optimizely Campaign.
3. When done, click **Save**.
4. Click the plus icon **+** for **Members** to add desired contacts or leads to the marketing list.



5. When done, click **Save**.

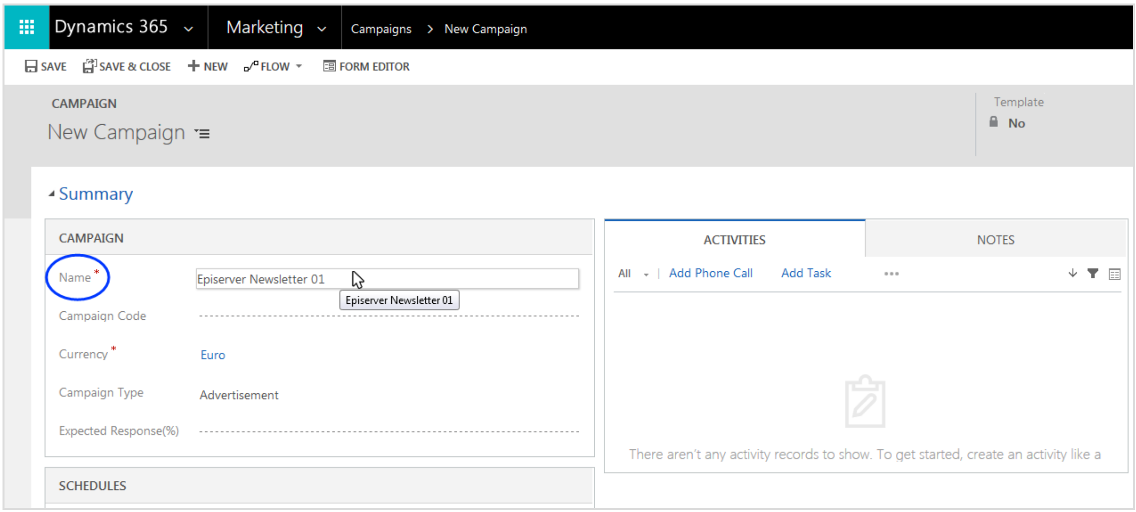
Creating a CRM campaign and adding the marketing list

1. Open Microsoft Dynamics CRM and select **Marketing** > **Campaigns**.

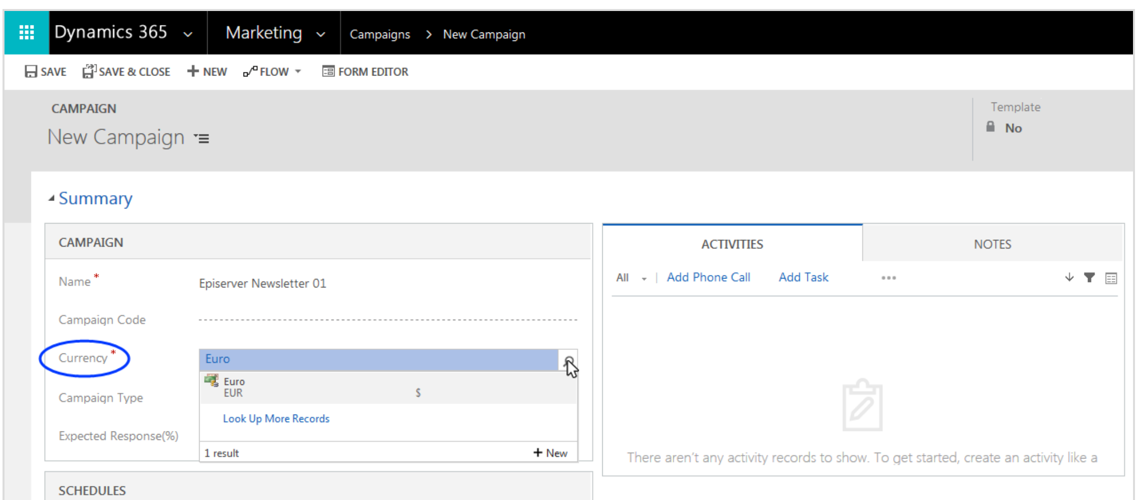


2. Click **New**.

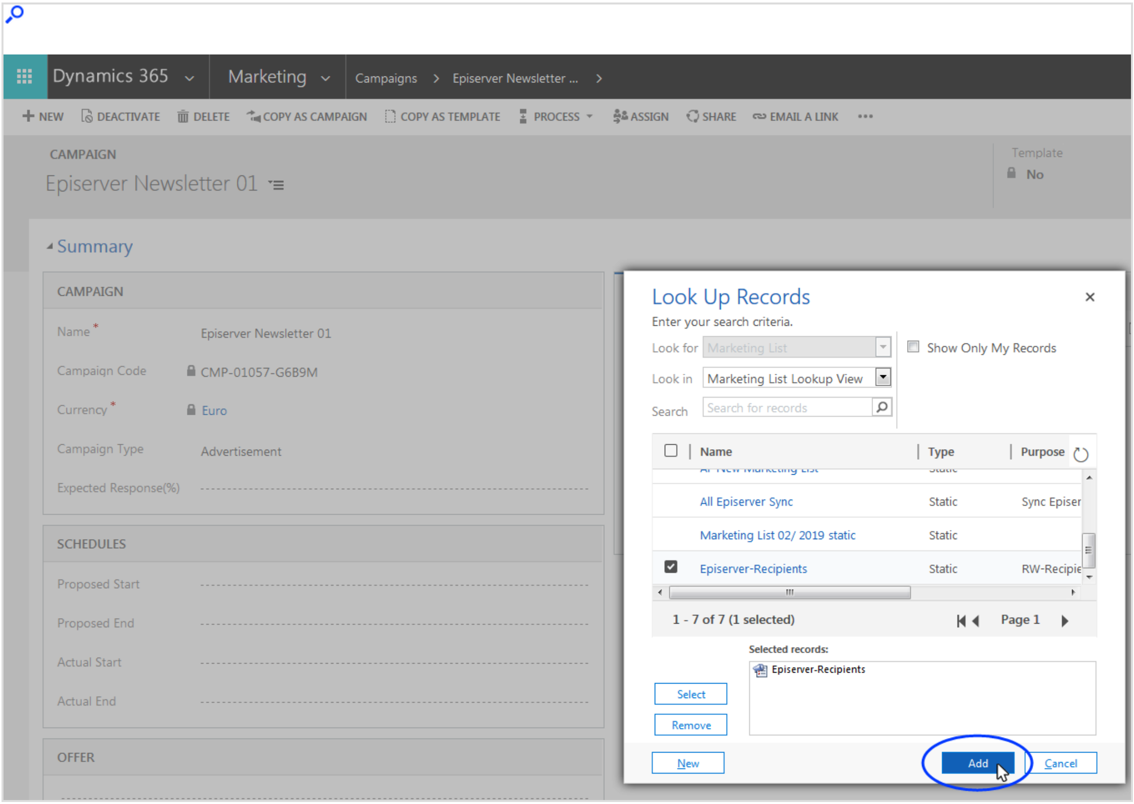
3. In the **Name** box, enter a name for your campaign.



4. In the **Currency** box, specify a currency for the campaign.



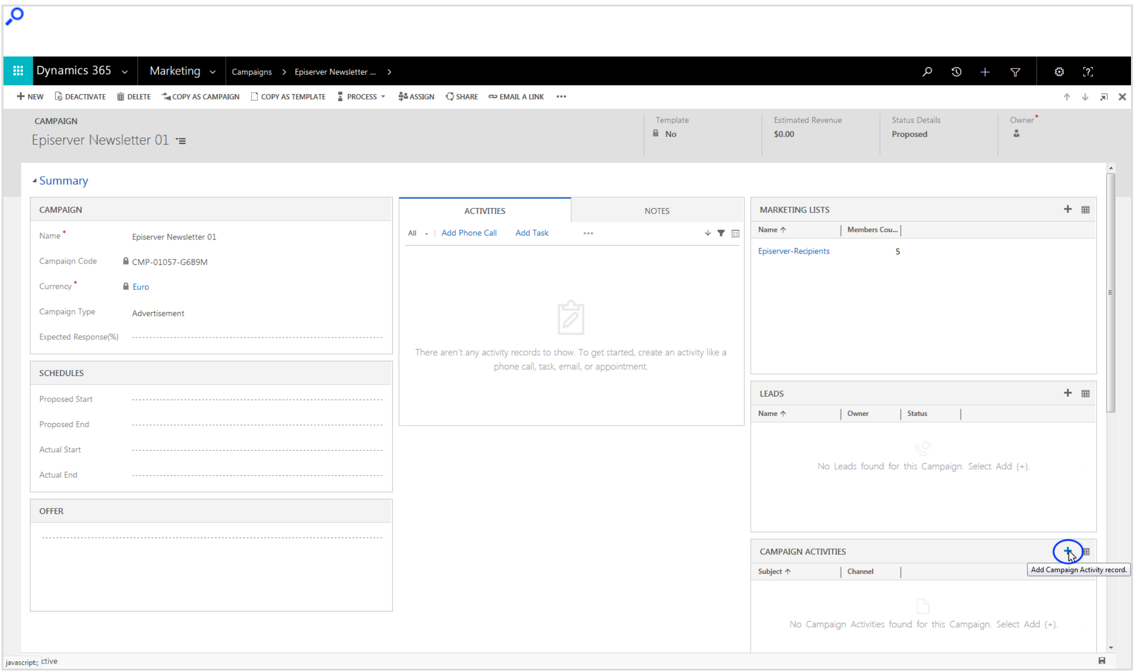
5. Click **Save**.
6. In the **Marketing Lists** area, click the plus icon **+**, select the desired marketing list and click **Add**.



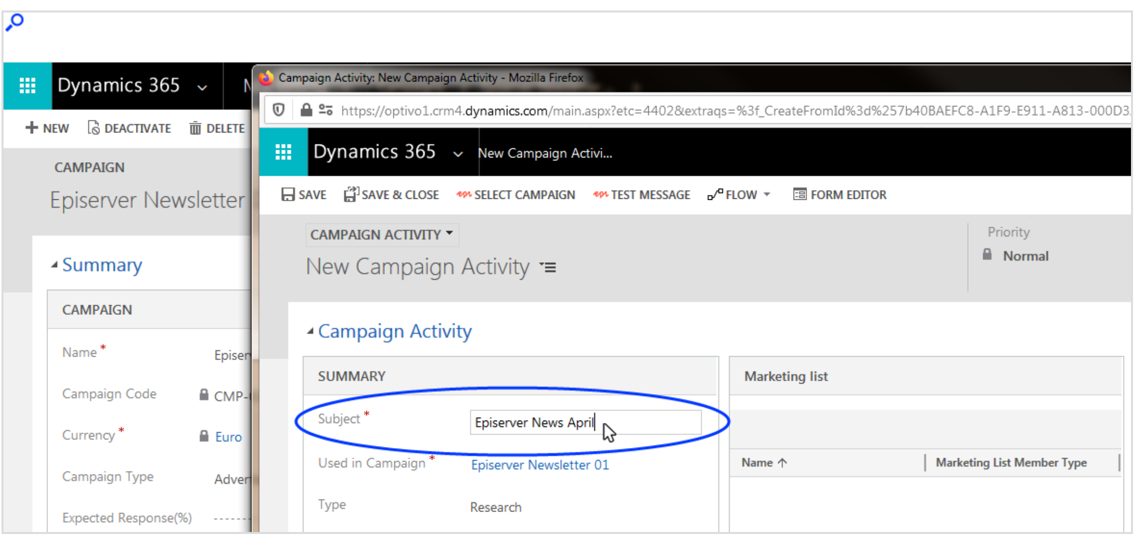
7. Click **Save**. Keep the window open for the next step.

Preparing campaign activity for dispatch

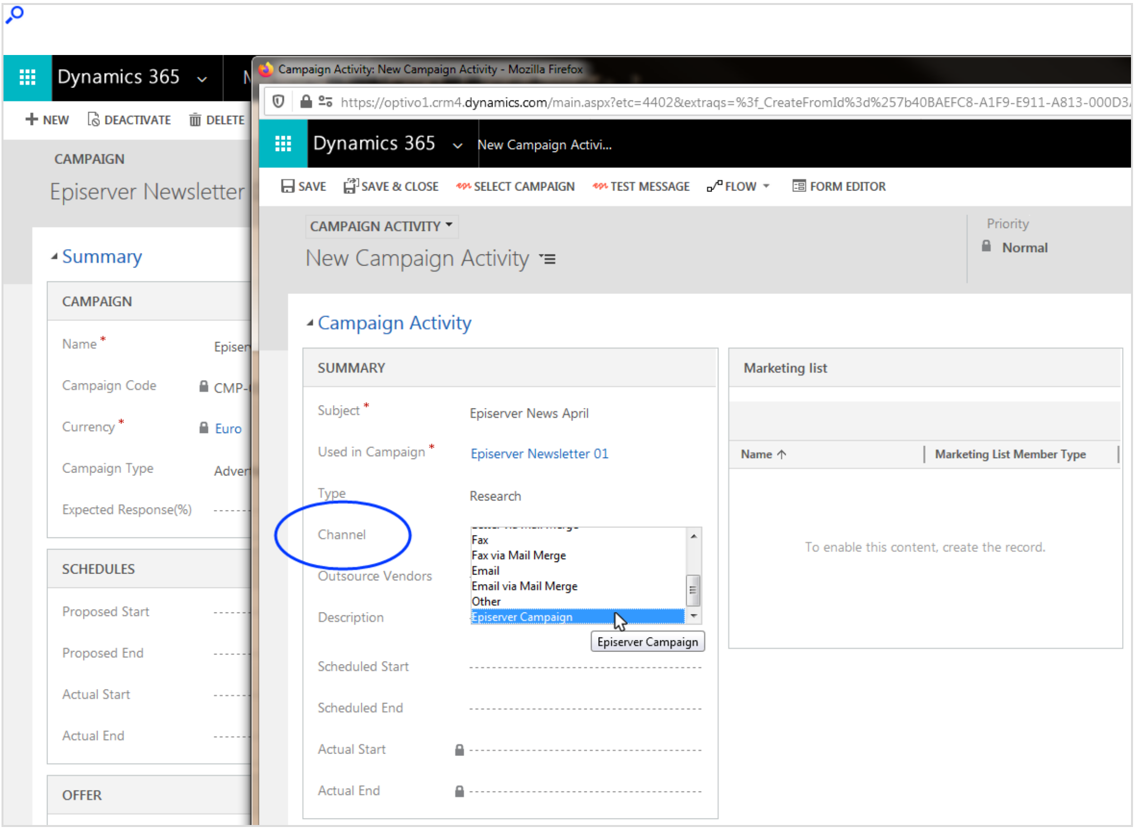
1. Click the plus icon **+** in the **Campaign Activities** area.



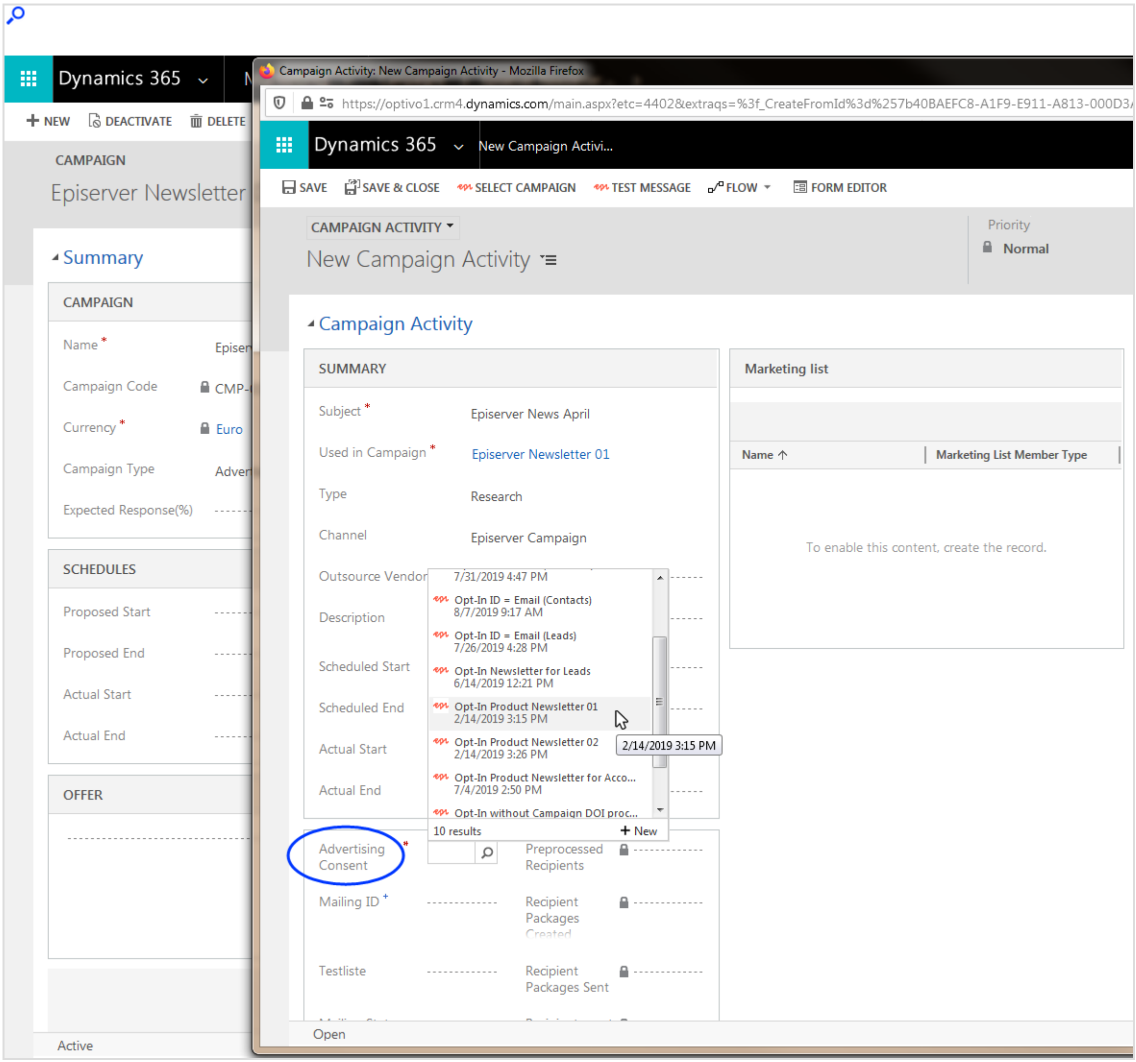
2. In the **Subject** box, enter a subject for your campaign activity.



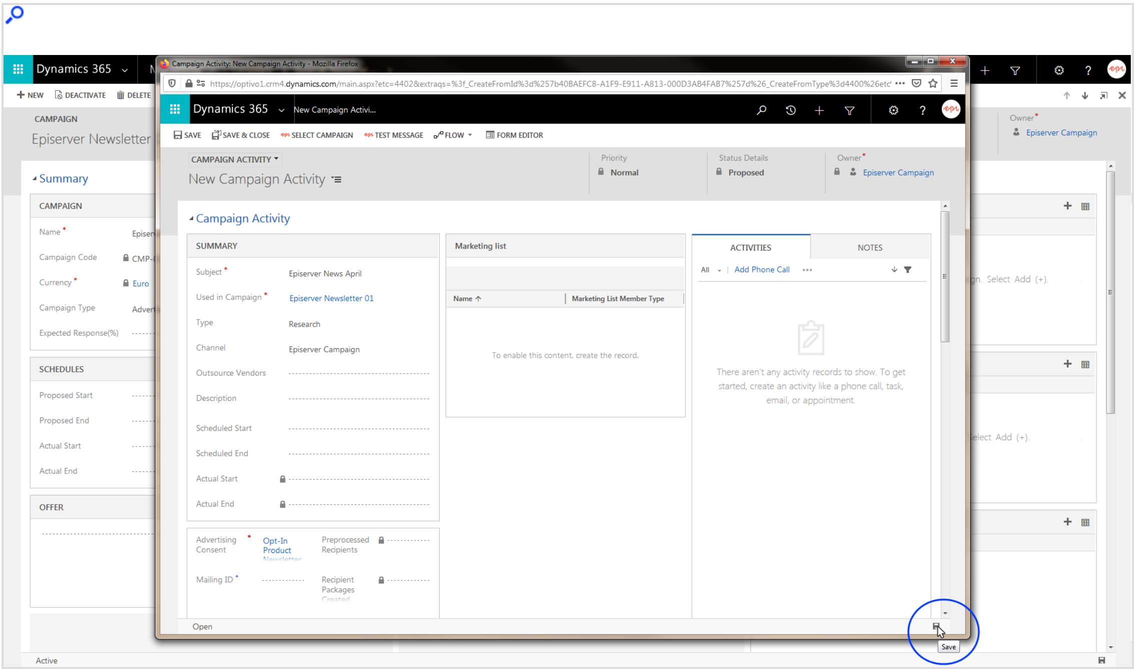
3. Under **Channel**, select **Episerver Campaign**.



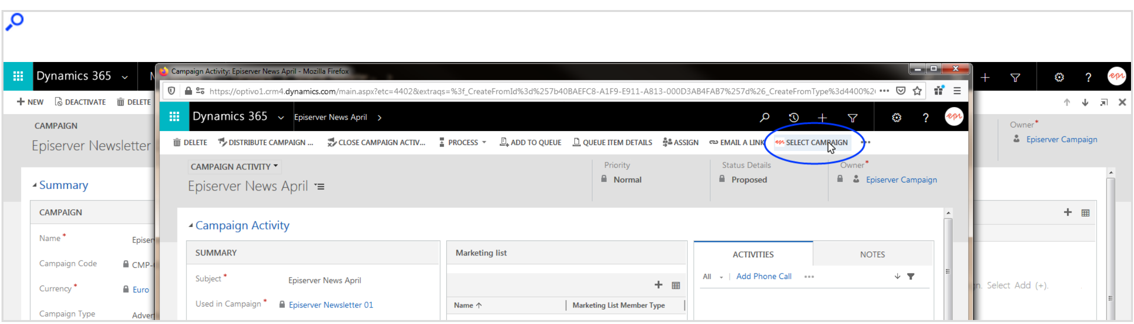
4. Under **Advertising Consent** in the new options area, click **Search** and select the corresponding advertising consent.


Dynamics 365
NEW
DEACTIVATE
DELETE
CAMPAIGN
Episerver Newsletter
Summary
CAMPAIGN
Name
Campaign Code
Currency
Euro
Campaign Type
Expected Response(%)
SCHEDULES
Proposed Start
Proposed End
Actual Start
Actual End
OFFER
Active
Campaign Activity: New Campaign Activity - Mozilla Firefox
https://optivo1.crm4.dynamics.com/main.aspx?etc=4402&extraqs=%3f_CreateFromId%3d%257b40BAEFC8-A1F9-E911-A813-000D3
Dynamics 365
New Campaign Activi...
SAVE
SAVE & CLOSE
SELECT CAMPAIGN
TEST MESSAGE
FLOW
FORM EDITOR
CAMPAIGN ACTIVITY
New Campaign Activity
Priority
Normal
Campaign Activity
SUMMARY
Subject
Episerver News April
Used in Campaign
Episerver Newsletter 01
Type
Research
Channel
Episerver Campaign
Outsource Vendor
Description
Scheduled Start
Scheduled End
Actual Start
Actual End
7/31/2019 4:47 PM
Opt-In ID = Email (Contacts)
8/7/2019 9:17 AM
Opt-In ID = Email (Leads)
7/26/2019 4:28 PM
Opt-In Newsletter for Leads
6/14/2019 12:21 PM
Opt-In Product Newsletter 01
2/14/2019 3:15 PM
Opt-In Product Newsletter 02
2/14/2019 3:26 PM
Opt-In Product Newsletter for Acco...
7/4/2019 2:50 PM
Opt-In without Campaign DOI proc...
10 results
New
2/14/2019 3:15 PM
Advertising Consent
Preprocessed Recipients
Mailing ID
Recipient Packages Created
Testliste
Recipient Packages Sent
Open
Marketing list
Name
Marketing List Member Type
To enable this content, create the record.

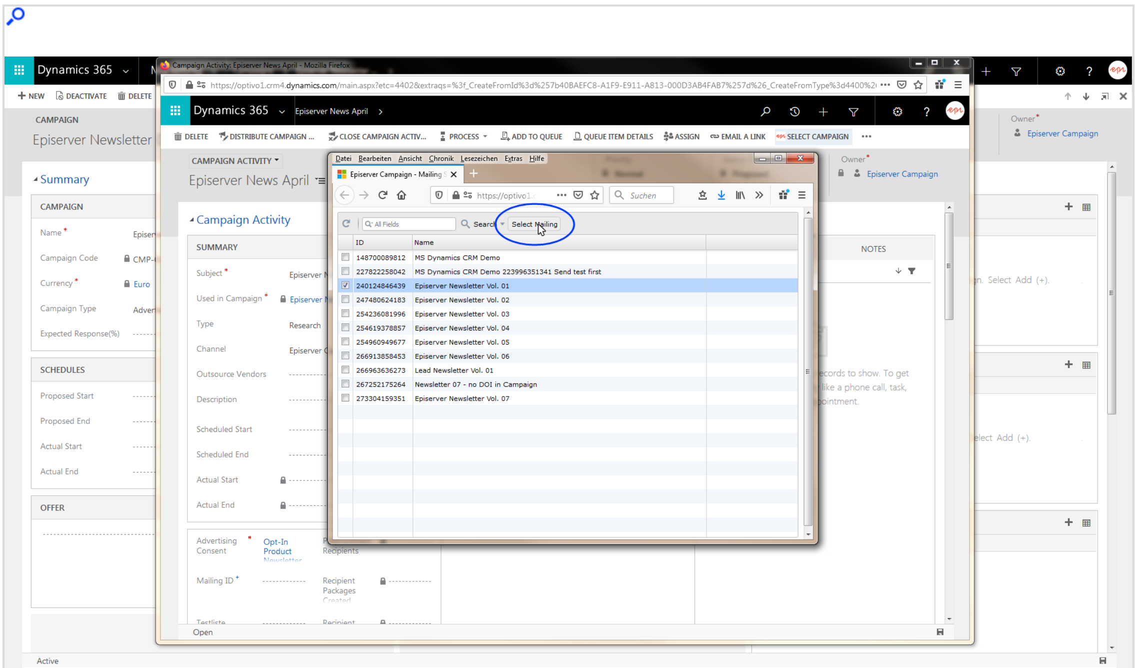
5. Click **Save**.



6. Click **Select Campaign**.



7. Select the mailing to be send and click **Select Mailing**.



8. Close the **Select Mailing** window and reload the **Campaign Activity** screen. The mailing ID is now assigned to the campaign activity.

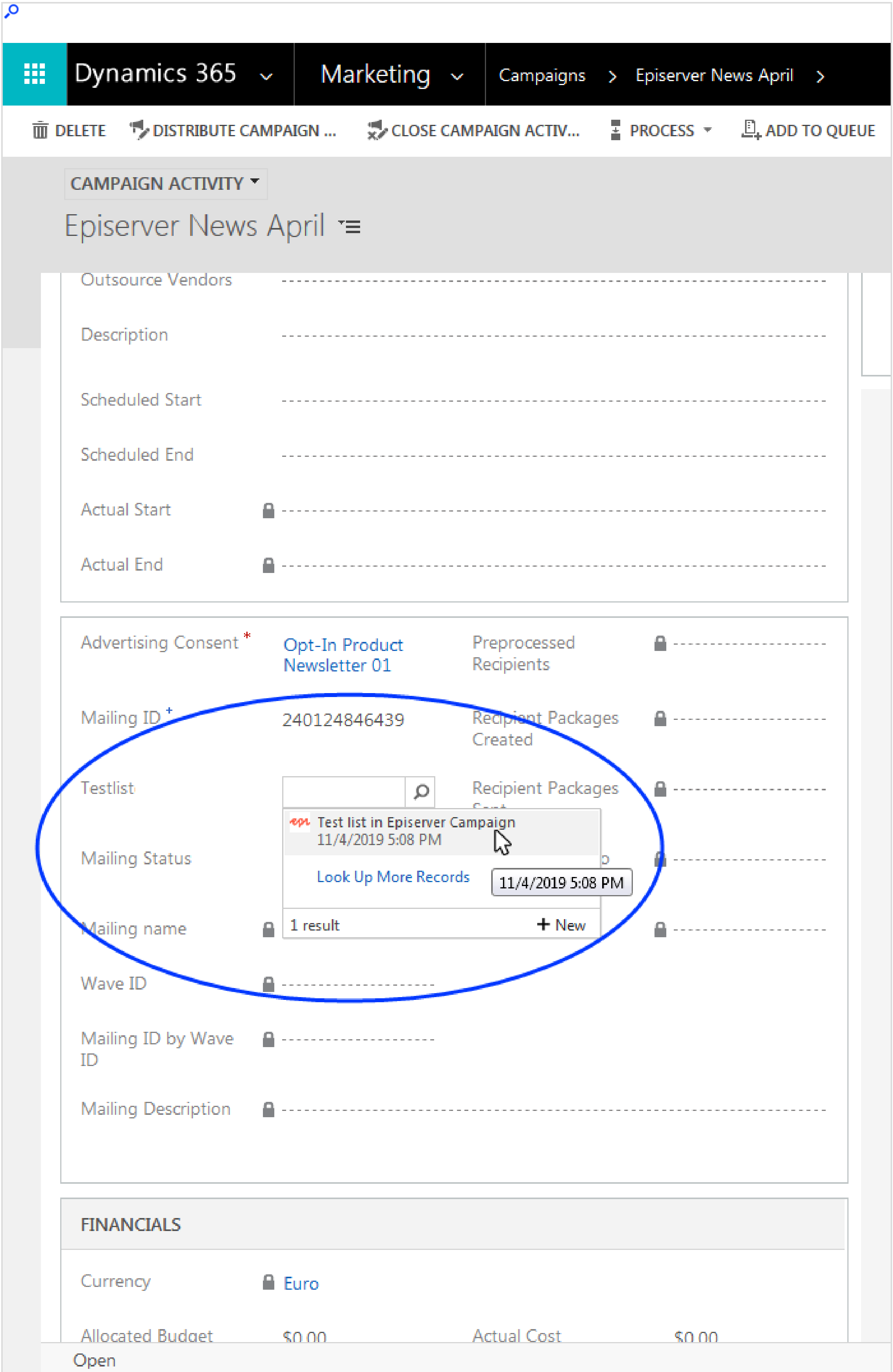
Checking mailing content before dispatch

Check the mailing content before dispatch by sending the mailing to a Optimizely Campaign test list. Do the following:

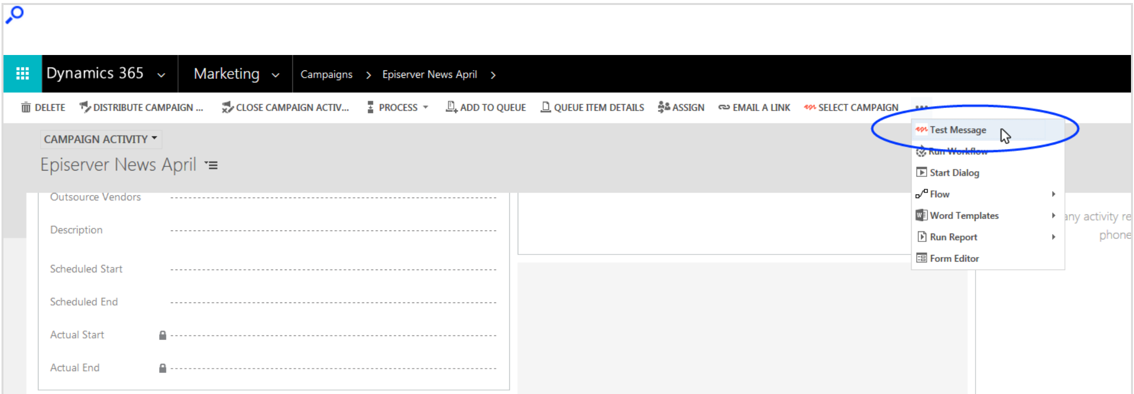
Prerequisite: You must assign a Optimizely Campaign test list in Microsoft Dynamics CRM. See Assigning Optimizely Campaign test lists.

1. On the **Campaign Activity** screen, select a Optimizely Campaign test list.

© Optimizely 2022

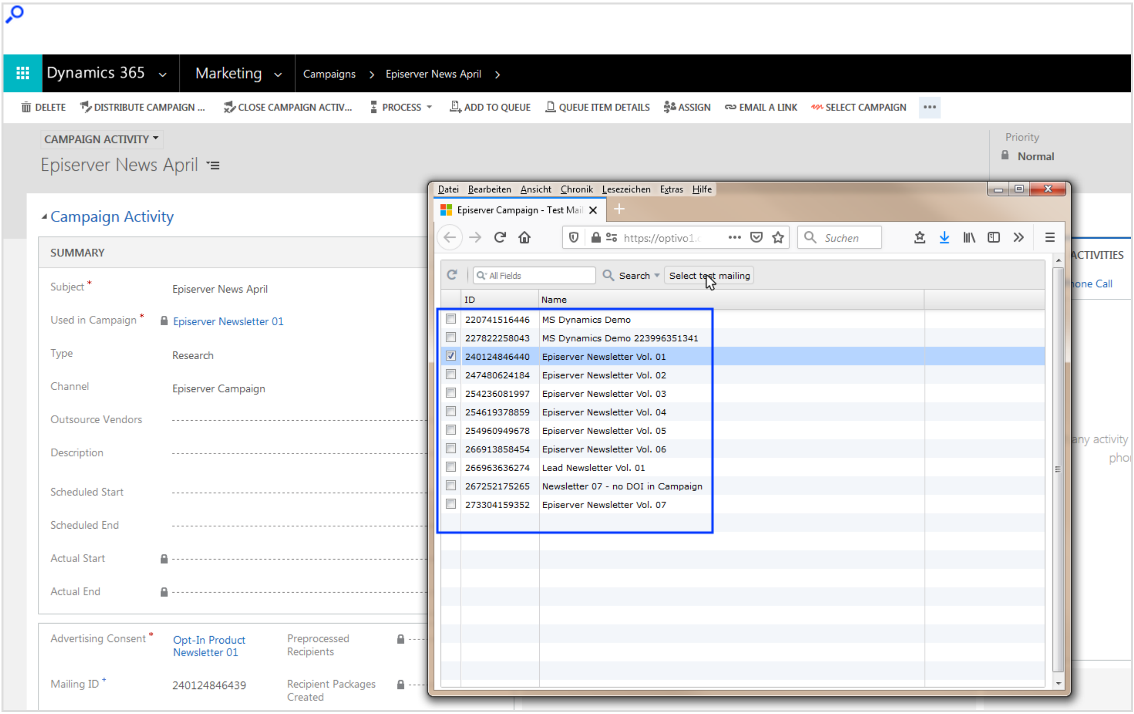

Dynamics 365
Marketing
Campaigns
Episerver News April
DELETE
DISTRIBUTE CAMPAIGN ...
CLOSE CAMPAIGN ACTIV...
PROCESS
ADD TO QUEUE
CAMPAIGN ACTIVITY
Episerver News April
Outsource Vendors
Description
Scheduled Start
Scheduled End
Actual Start
Actual End
Advertising Consent
Opt-In Product Newsletter 01
Preprocessed Recipients
Mailing ID
240124846439
Recipient Packages Created
Testlist
Recipient Packages
Test list in Episerver Campaign
11/4/2019 5:08 PM
Mailing Status
Look Up More Records
11/4/2019 5:08 PM
Mailing name
1 result
New
Wave ID
Mailing ID by Wave ID
Mailing Description
FINANCIALS
Currency
Euro
Allocated Budget
$0.00
Actual Cost
$0.00
Open

2. Click **Test Message**.

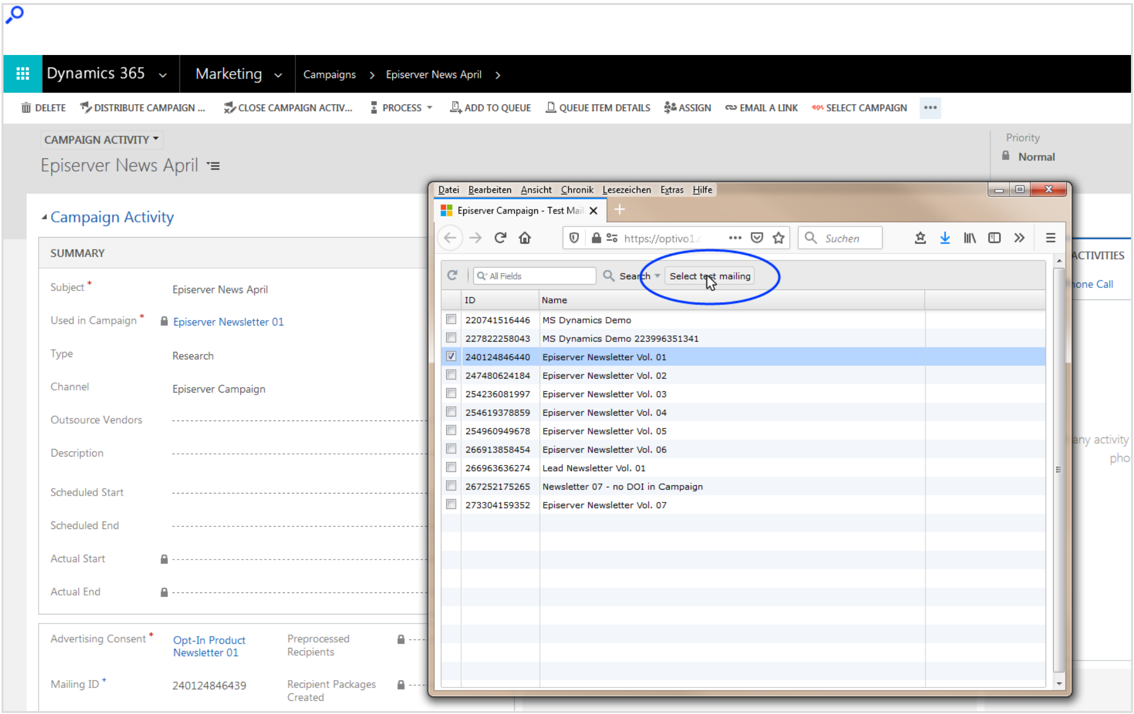


3. Select the mailing you want to send to the test list.

> **Note:** The list shows all mailings that are related to campaigns in the status *Activation required* in Optimizely Campaign. You must know the names of the corresponding mailings. The mailing name does not necessarily correspond to the campaign name. In the case of A/B tests, mailings typically have different names than the campaigns.


Dynamics 365
Marketing
Campaigns
Episerver News April
DELETE
DISTRIBUTE CAMPAIGN ...
CLOSE CAMPAIGN ACTIV...
PROCESS
ADD TO QUEUE
QUEUE ITEM DETAILS
ASSIGN
EMAIL A LINK
SELECT CAMPAIGN
CAMPAIGN ACTIVITY
Episerver News April
Priority
Normal
Campaign Activity
SUMMARY
Subject
Episerver News April
Used in Campaign
Episerver Newsletter 01
Type
Research
Channel
Episerver Campaign
Outsource Vendors
Description
Scheduled Start
Scheduled End
Actual Start
Actual End
Advertising Consent
Opt-In Product Newsletter 01
Preprocessed Recipients
Mailing ID
240124846439
Recipient Packages Created
Datei Bearbeiten Ansicht Chronik Lesezeichen Extras Hilfe
Episerver Campaign - Test Mai
Suchen
All Fields
Search
Select test mailing
ID
Name
220741516446 MS Dynamics Demo
227822258043 MS Dynamics Demo 223996351341
240124846440 Episerver Newsletter Vol. 01
247480624184 Episerver Newsletter Vol. 02
254236081997 Episerver Newsletter Vol. 03
254619378859 Episerver Newsletter Vol. 04
254960949678 Episerver Newsletter Vol. 05
266913858454 Episerver Newsletter Vol. 06
266963636274 Lead Newsletter Vol. 01
267252175265 Newsletter 07 - no DOI in Campaign
273304159352 Episerver Newsletter Vol. 07
ACTIVITIES

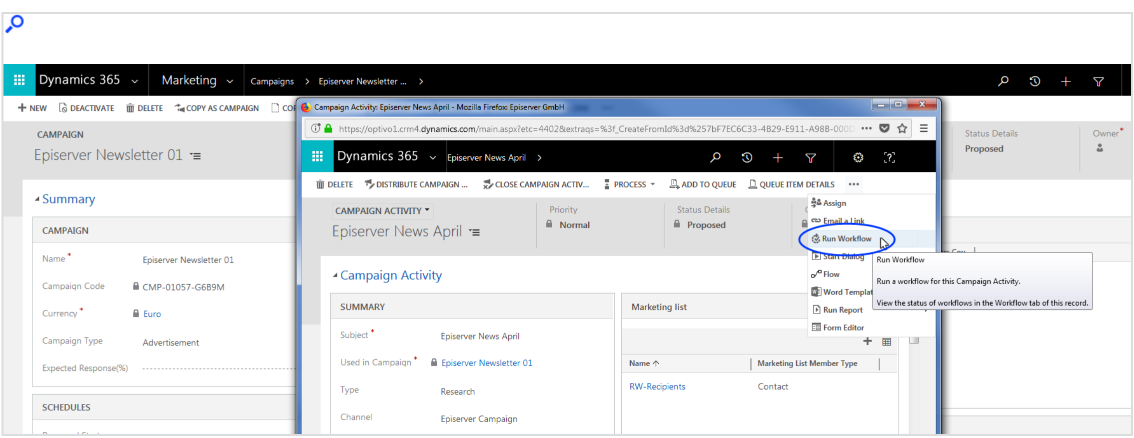
4. Click **Select test mailing** to send the mailing.



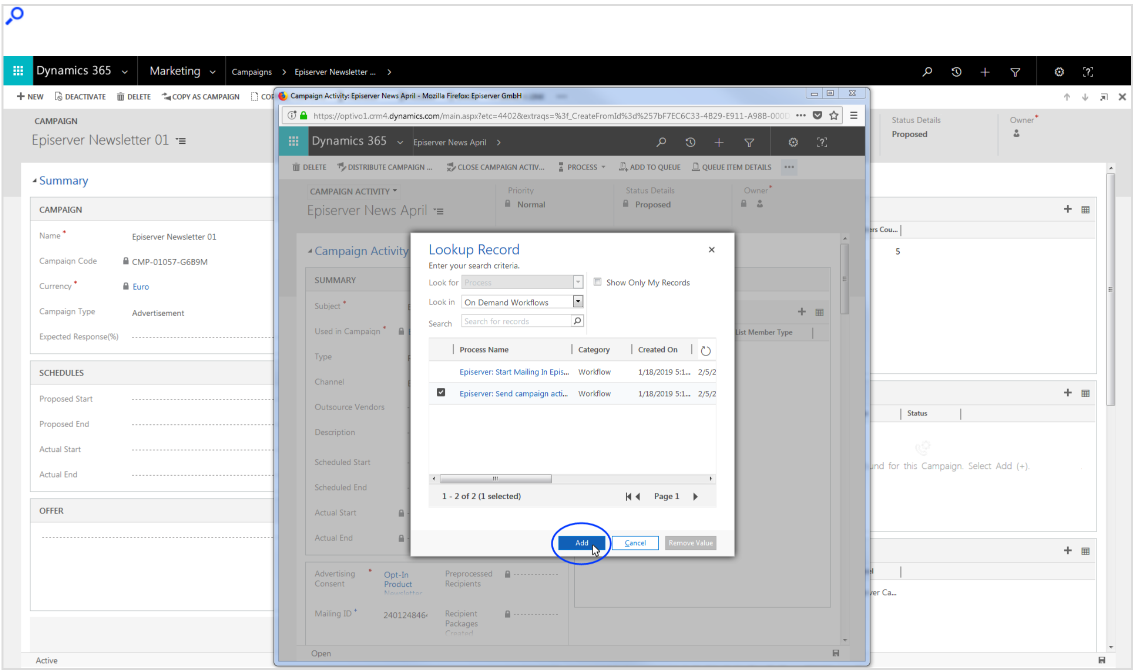
Starting and monitoring dispatch workflows

Starting the workflow

1. Click **Run Workflow** in the campaign activity screen in Microsoft Dynamics CRM.



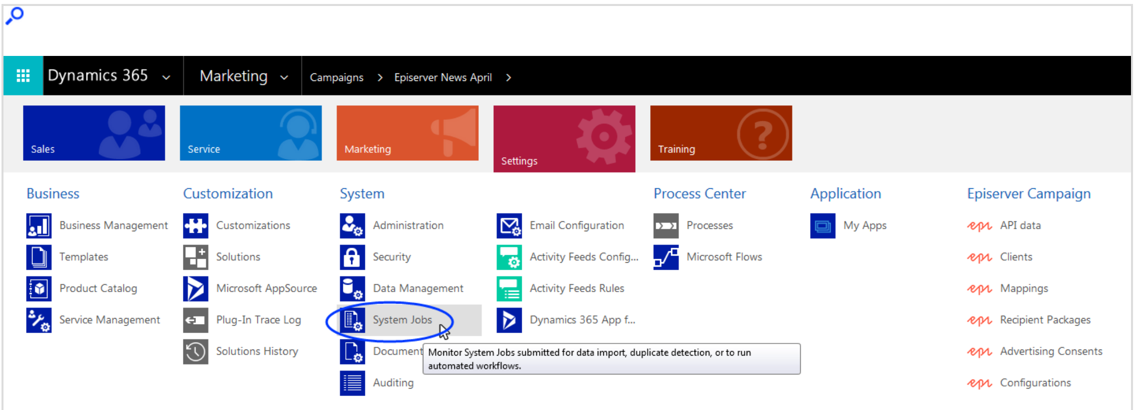
2. Select **Episerver: Send campaign activity to Episerver Campaign** and click **Add**. Do not start the workflow **Episerver: Start mailing in Episerver Campaign**. This is automatically called by the integration.



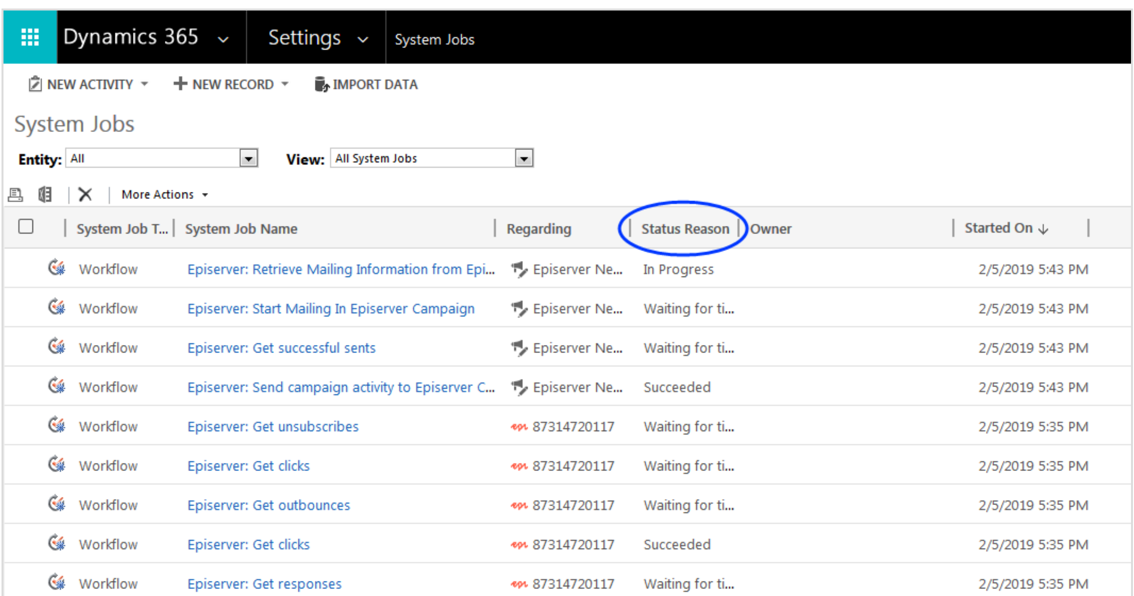
Contacts and leads from the marketing list are transferred to Optimizely Campaign via the interface through **Recipient packages**, and the **Mailing status** changes from **Planned** to **Transmitting**.

Monitoring workflow activity

1. Open Microsoft Dynamics CRM and select **Settings** > **System Jobs**.



2. Under **View**, open **My System Jobs** from the drop-down list. You can see the current workflow status under **Status Reason**.



> **Note:** If an error is displayed under **Status Reason**, click the corresponding workflow to see details.

Sending transactional mails

> **Note:** This topic is for administrators and developers with administration access rights in Microsoft Dynamics.

This topic describes how to send transaction mails in Optimizely Campaign from Microsoft Dynamics CRM using a workflow in CRM. After sending, response data (opens, clicks) are automatically transferred into CRM.

Prerequisites

- **Configuration** of the integration completed, see Configuration.
- **Campaign mailing** prepared in Optimizely Campaign.
- The **ID of the campaign mailing** to be sent. You can find the ID under **Transactional mails** in Optimizely Campaign. Select the column **ID** in the drop-down list to the right.
- The authorization code of the recipient list used by the transactional mailing.

Configuring transactional mailings and workflows

Before sending a transactional mailing from Optimizely Campaign, you need to configure the transactional mailing in Microsoft Dynamics CRM. You can send these mailings to contacts, accounts or leads even without advertising consent. You also need to define a workflow to trigger the transactional mailing.

Configuring the transactional mailing

1. Open Microsoft Dynamics CRM and select **Settings** > **Configurations**.
2. Click **New**.
3. Enter a name for the configuration.
4. In the **Value** field, define the configuration using an XML format. The fields <authCode> and <bmMailingID> are mandatory.

For `<authCode>`, enter the **authorization code** for the transactional mailing's recipient list. For `<bmMailingId>`, enter the **mailing ID** of the transactional mailing.

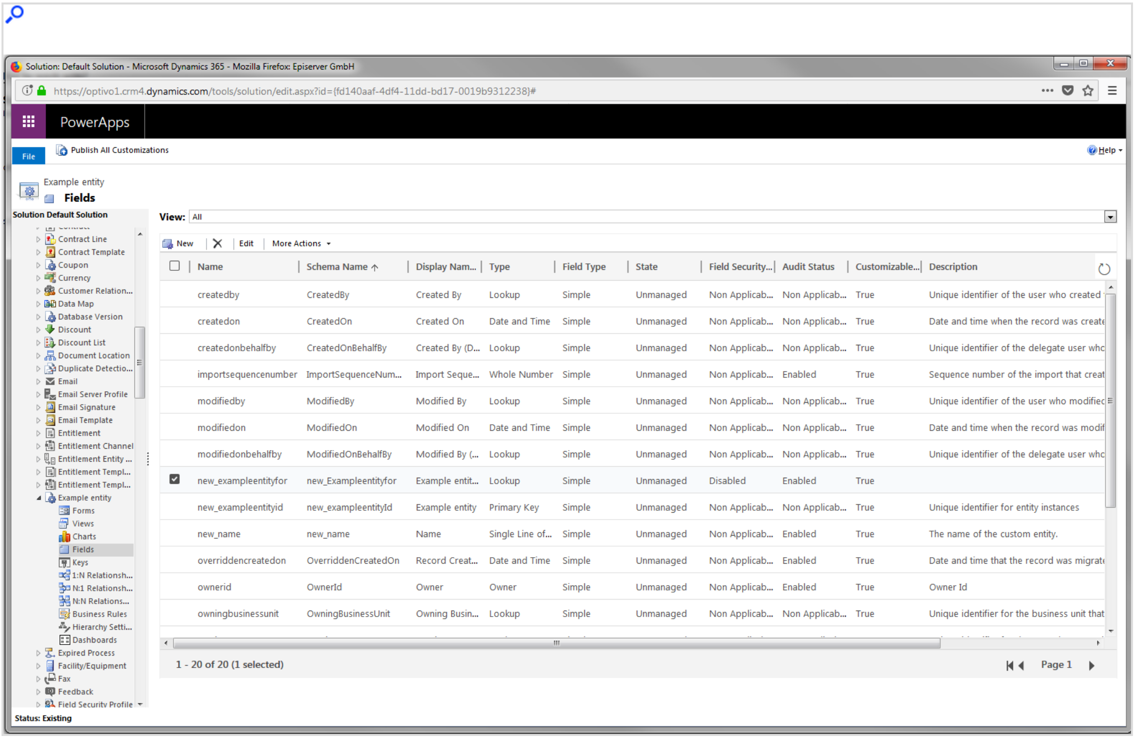
Other fields can be optionally linked, as long as the information is available in CRM.

```
<root>
<authCode>authorization.Code</authCode>
<bmMailingId>mailing.ID</bmMailingId>
<firstname>object.firstname</firstname>
<lastname>object.lastname</lastname>
<salutation>object.salutation</salutation>
</root>
```

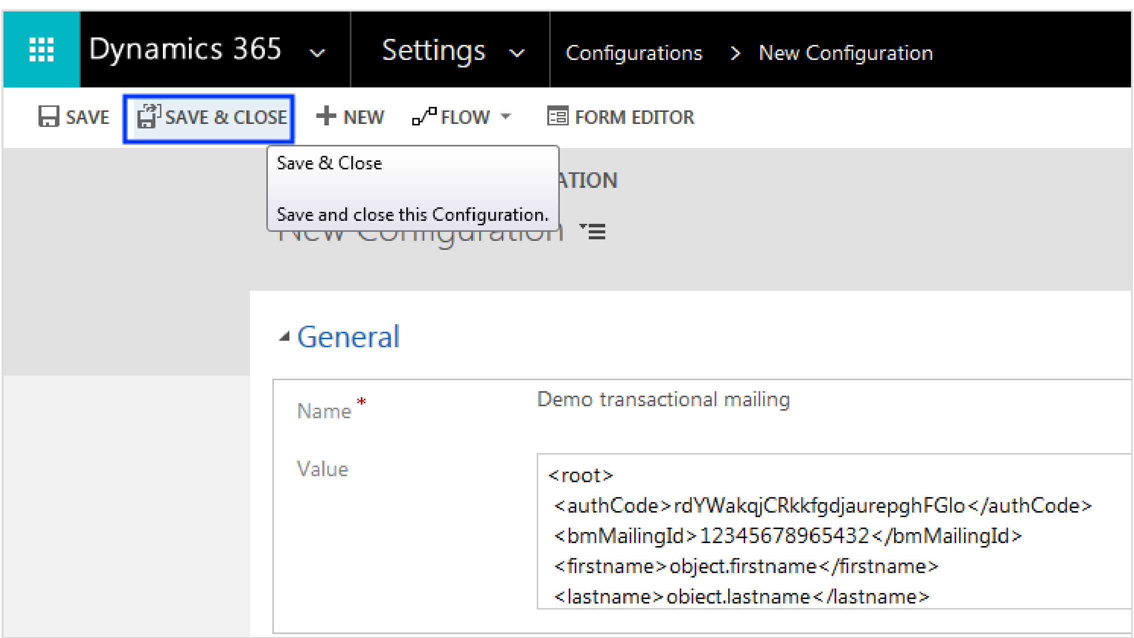
When sending from another entity except *contact*, *lead* or *account*, a lookup references to the connected `bmRecipientId`. Furthermore, data fields in *contact*, *lead* or *account* are integrated via lookups.

```
<root>
<authCode> Authorisierungs-Code </authCode>
<bmMailingId> Mailing-ID </bmMailingId>
<bmRecipientId>object.new_exampleentityfor.emailaddress1</bmRecipientId>
<dynamicsId>object.new_exampleentityfor.contactid</dynamicsId>
<first_name>object.new_exampleentityfor.firstname</first_name>
<last_name>object.new_exampleentityfor.lastname</last_name>
</root>
```

You can find the name of the lookup element that is inserted between the `object` and the field name (for example, `contactid`) in the **Fields** overview. Search for the name of the field in which the lookup for *contact*, *lead*, or *account* is performed. In the example, the name is *new_exampleentityfor.*



5. Click **Save & Close**.



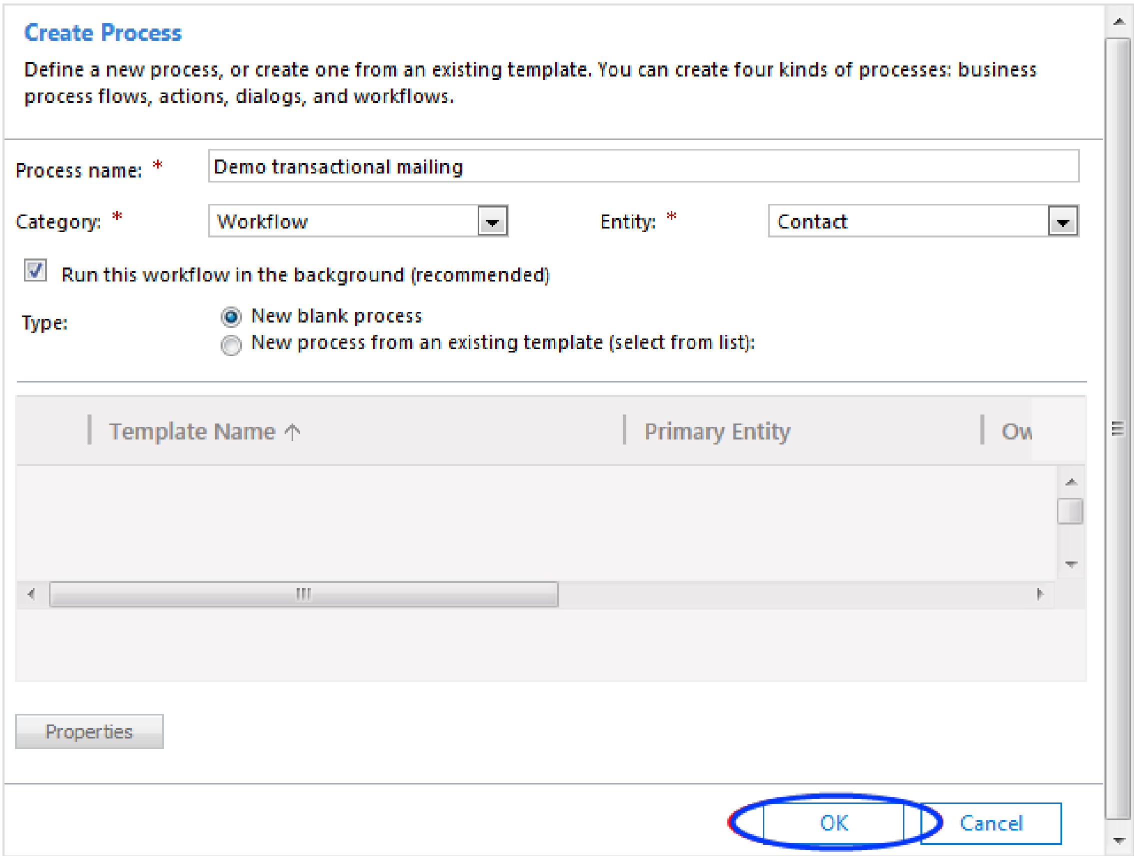
> **Note:** The configuration can be updated and saved if needed.

Configuring the workflow

1. Open Microsoft Dynamics CRM and select **Settings** > **Processes**.

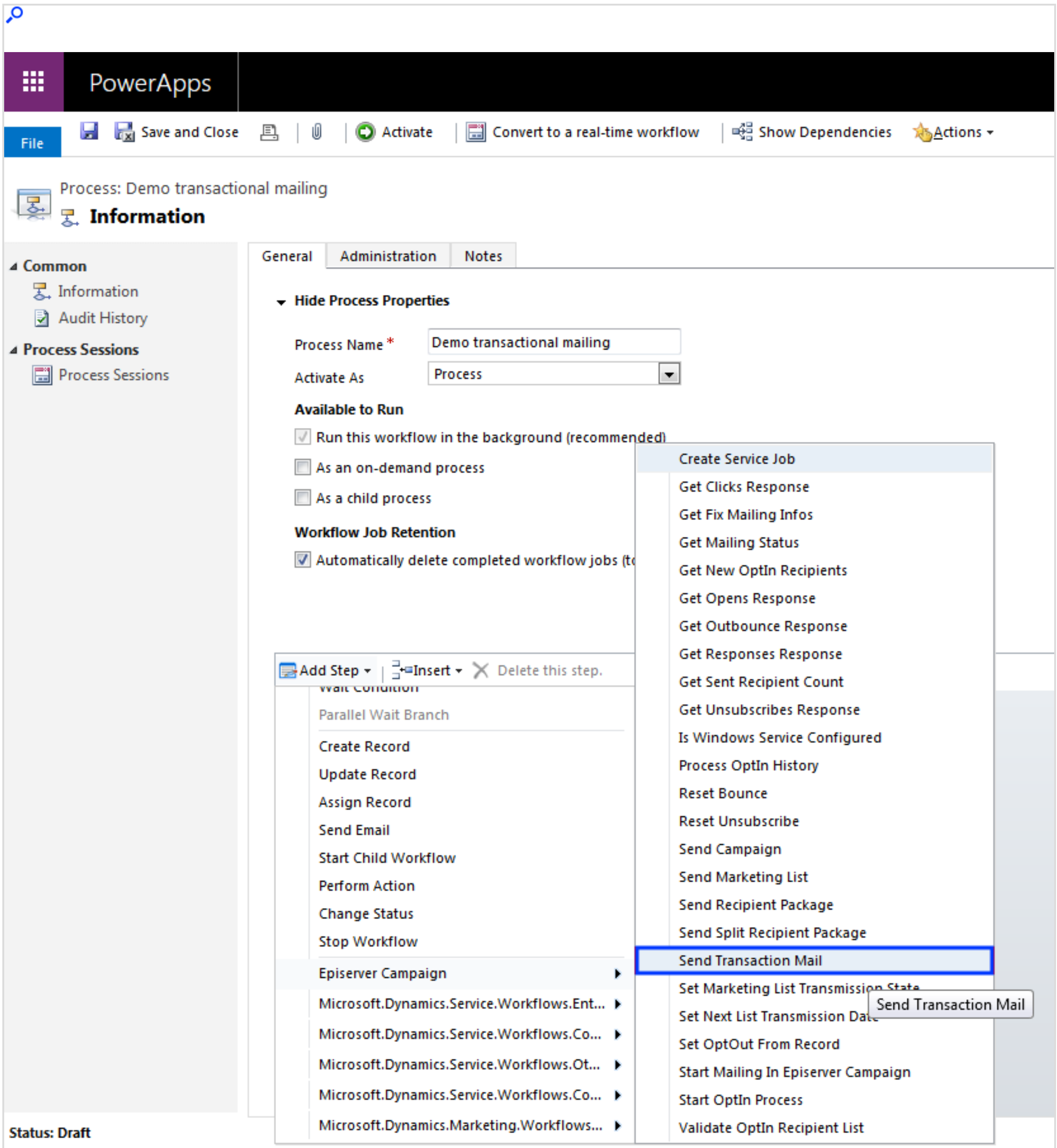
2. Click **New**.
3. Enter a name in **Process name**.
4. Under **Category**, select **Workflow**.
5. As **Entity**, select **Contact**, **Lead** or **Company**.
6. Keep the selection **Run this workflow in the background**.
7. Select **New blank process**, if you are not using an existing workflow as template,

8. Click **OK**.



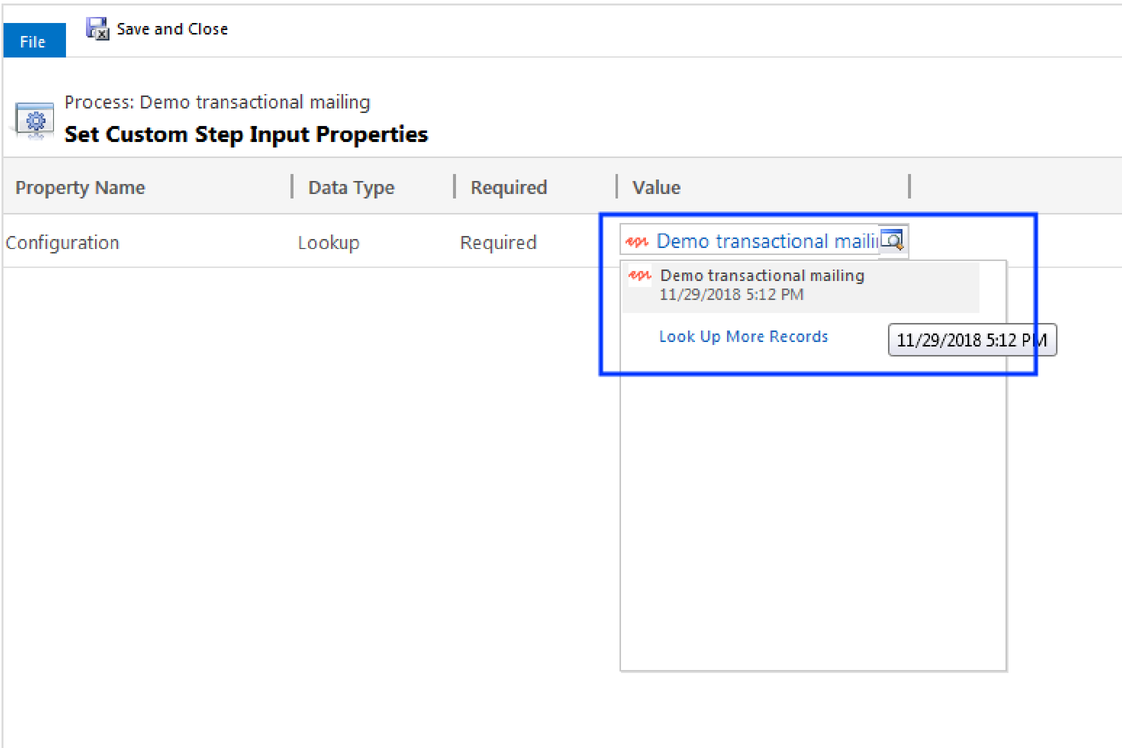
9. Under **Activate As** define if the workflow is to be created as process or as template.
10. Under **Available to Run**, select the dependencies of the process. For manual start, select **As an on-demand process**.
11. Under **Workflow Job Retention**, define if the workflows should be automatically deleted after completion.
12. Under **Options for Automatic Processes**, define who can start the process.
13. Under **Start when**, define which action should trigger automatic dispatch. If nothing is selected, the dispatch is started manually in CRM.

14. Select **Add Step** > **Episerver Campaign** > **Send Transaction Mail**.



15. Click **Set Properties**.

16. In the **Value** column, search for and select the previously created configuration.



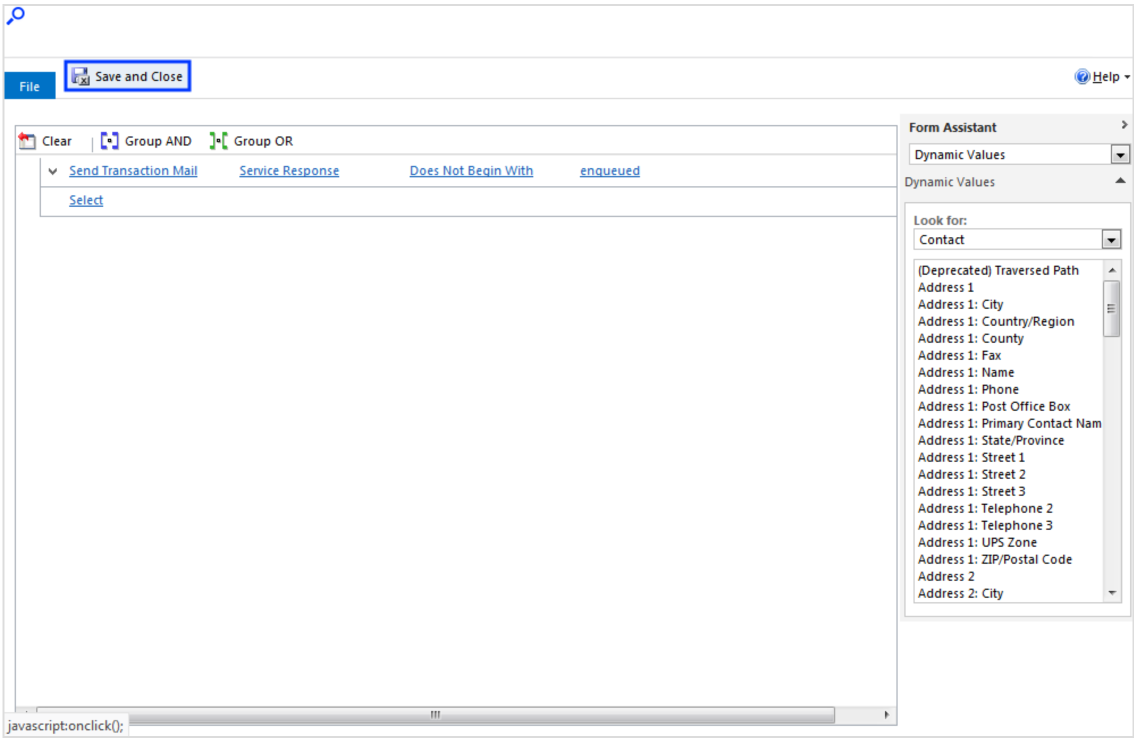
17. Click **Save and Close.**

Checking return values of the process

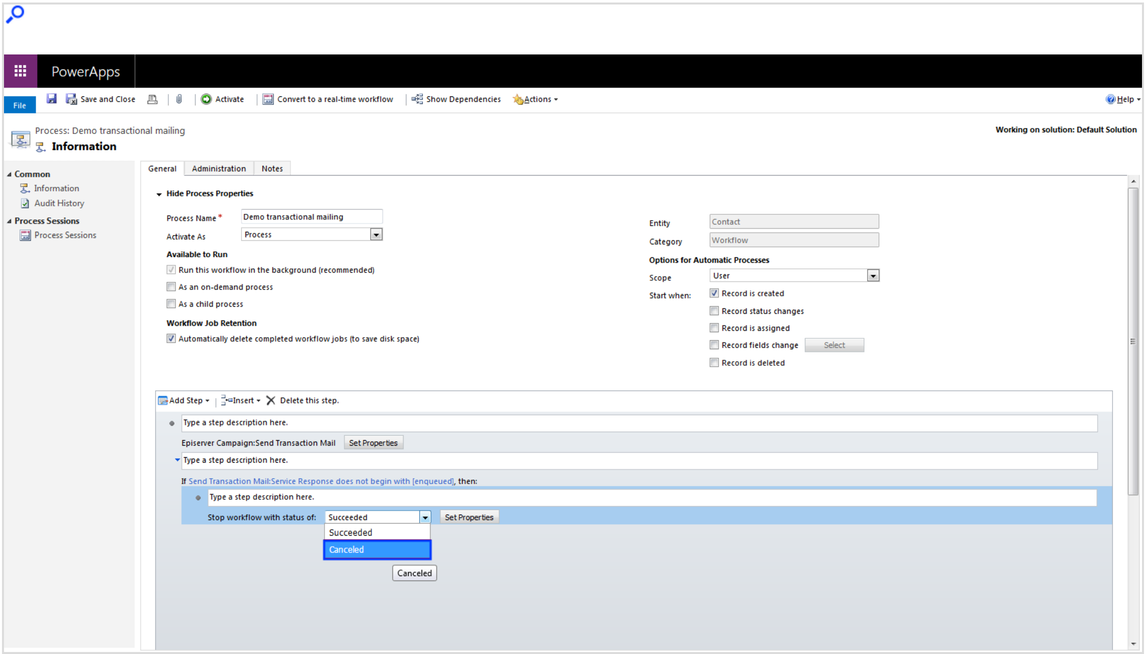
You should add error handling steps, configuring how the process should handle different return values of incorrectly sent transactional mails. Transactional mailings are sent using the sendtransactionmail operation of the HTTP API. Here is an example for canceling an unsuccessful process.

1. In the **Process** window in Microsoft Dynamics CRM, click **Add Step** > **Check Condition**.
2. Click **<condition> (click to configure)**.
3. Click **Select**.
4. Click **Send Transaction Mail**.
5. Click **Service Response** in the second drop-down list.
6. Click **Does Not Begin With** in the third drop-down list.

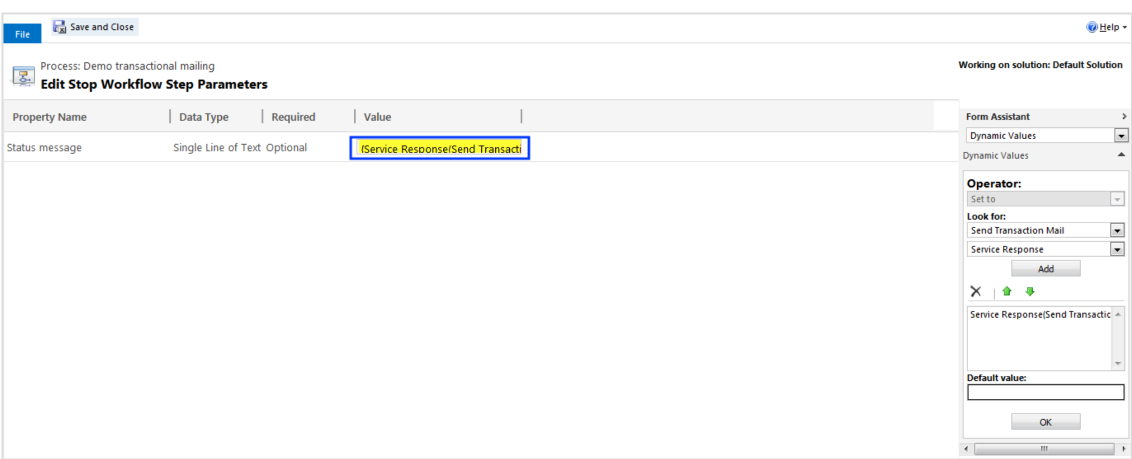
7. Click **Enter value** and enter the return value *enqueued*.
8. Click **Save and Close**.



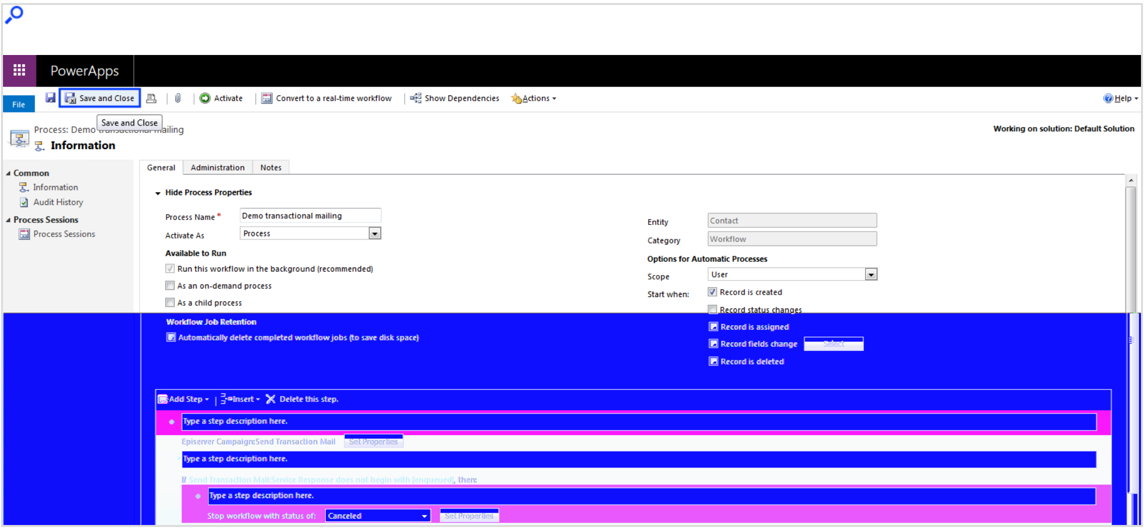
9. Click **Select this row and click Add Step**.
10. Select **Add Step** > **Stop Workflow**.
11. Select **Canceled** in the status drop-down list.



12. Click **Set Properties**.
13. Click in the **Value** column.
14. In the drop-down list, select **Look for:**> **Send Transaction Mail**.
15. In the drop-down list, select **Service Response**.
16. Click **Add**.
17. Click **OK**.
18. Click **Save and Close**.



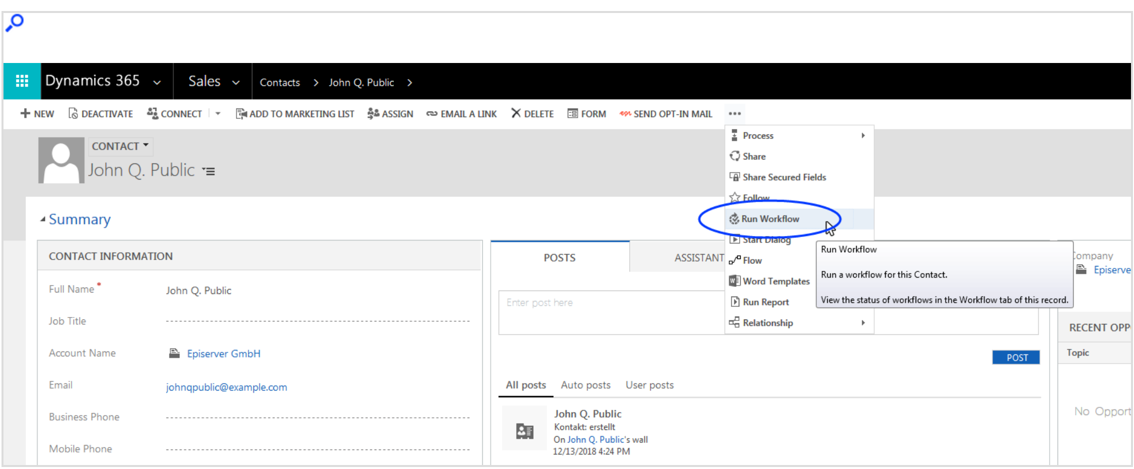
19. Under **Process** in the menu bar, click **Convert to a real-time workflow**.
20. Click **Activate**, and **Activate** in the **Process Activate Confirmation** dialog box.
21. In the **Process** window, click **Close**.



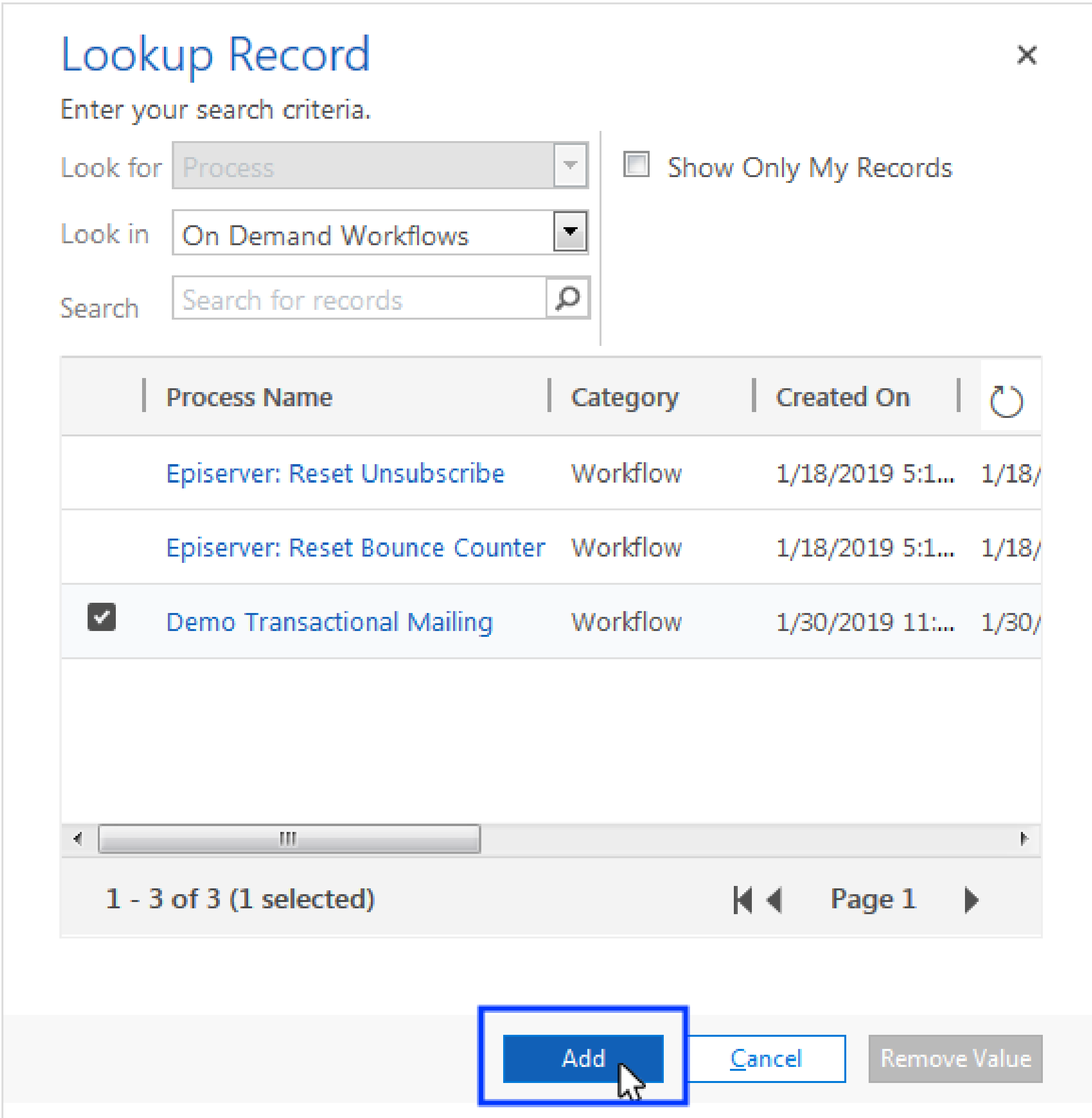
Send out transactional mailing

The workflow is now fully created, activated and starts according to the preconfigured action or may be triggered manually. A transaction mailing is started manually from the entity specified in the process.

1. Select **Run Workflow** in the entity.



2. The **Lookup Record** dialog box opens. Select the workflow of the transaction mailing and click **Add**.



3. The dialog box **Confirm Application of Workflow** opens. Click **OK**.

Copying marketing lists

> **Note:** This topic is for administrators and developers with administration access rights in Microsoft Dynamics.

With the Microsoft Dynamics CRM integration you can copy contacts and leads from a marketing list to an Optimizely Campaign recipient list on a daily or weekly basis. You can then use this data to send welcome or birthday mailings in a Marketing Automation campaign.

The copying is one-way from CRM to Optimizely Campaign. Unsubscribes and outbounces are updated back into CRM. Other data will not be updated in CRM if changed in Optimizely Campaign.

Prerequisites

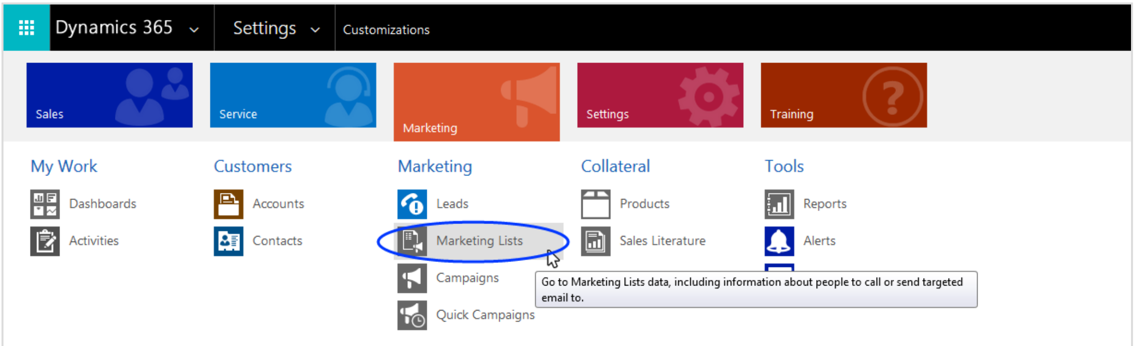
To configure a corresponding recipient list in the relevant client, contact customer support. Furthermore, you must configure the marketing list for the copying process and start the workflow for automatic copying.

> **Note:** The recipient list format is the same as for campaign management. If you need additional fields in your recipient list, contact customer support before configuring copying of marketing lists.

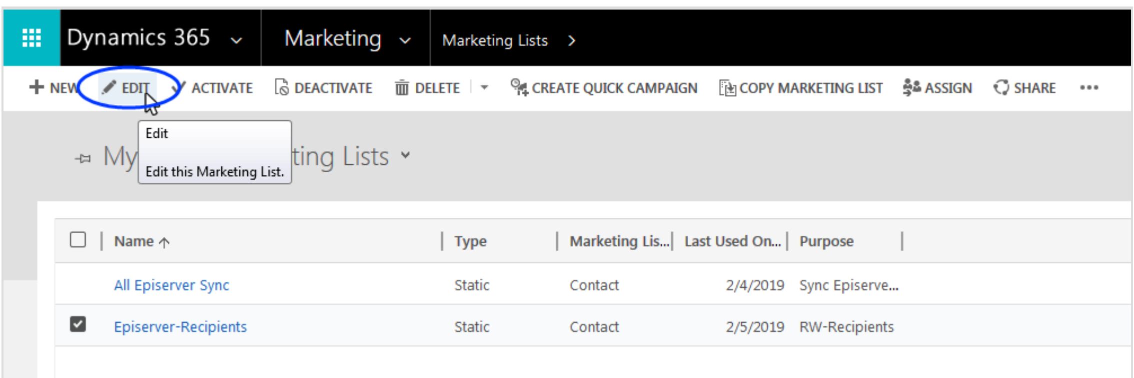
Configuring the marketing list for the copying process

After the recipient list is configured, do the following:

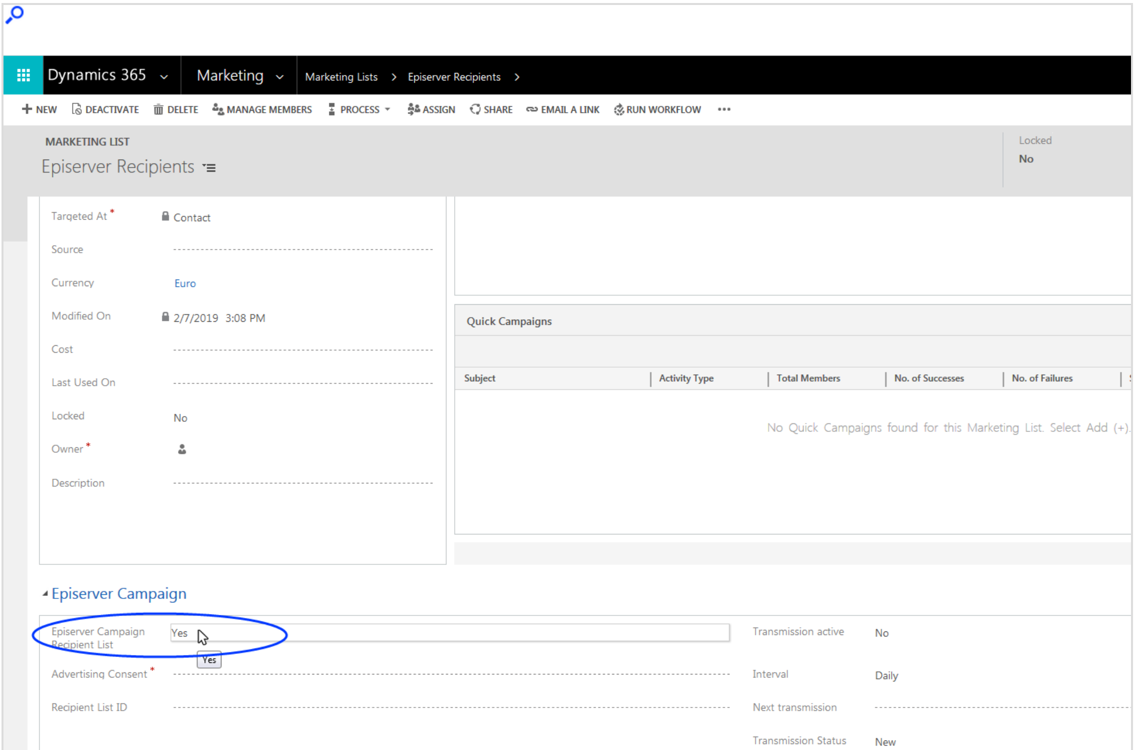
1. Open Microsoft Dynamics CRM and select **Marketing** > **Marketing Lists**.



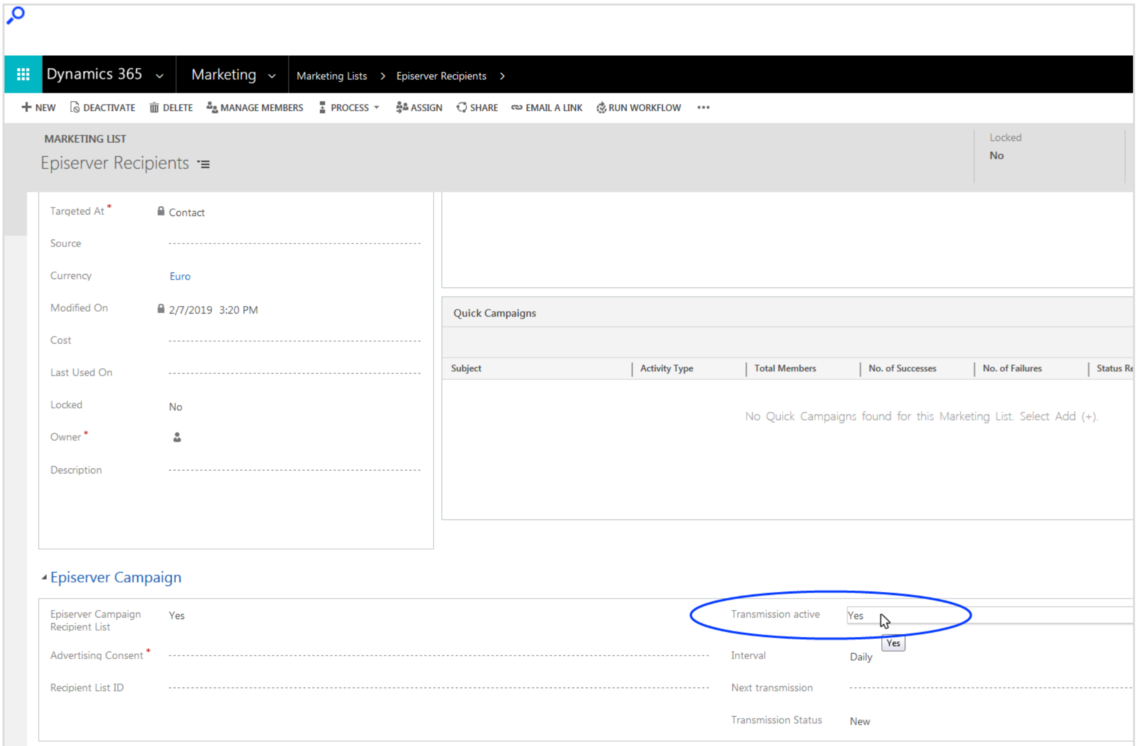
2. Select the marketing list to synchronize and click **Edit**.



3. Click **Yes** in the field next to the **Episerver Campaign Recipient list**.

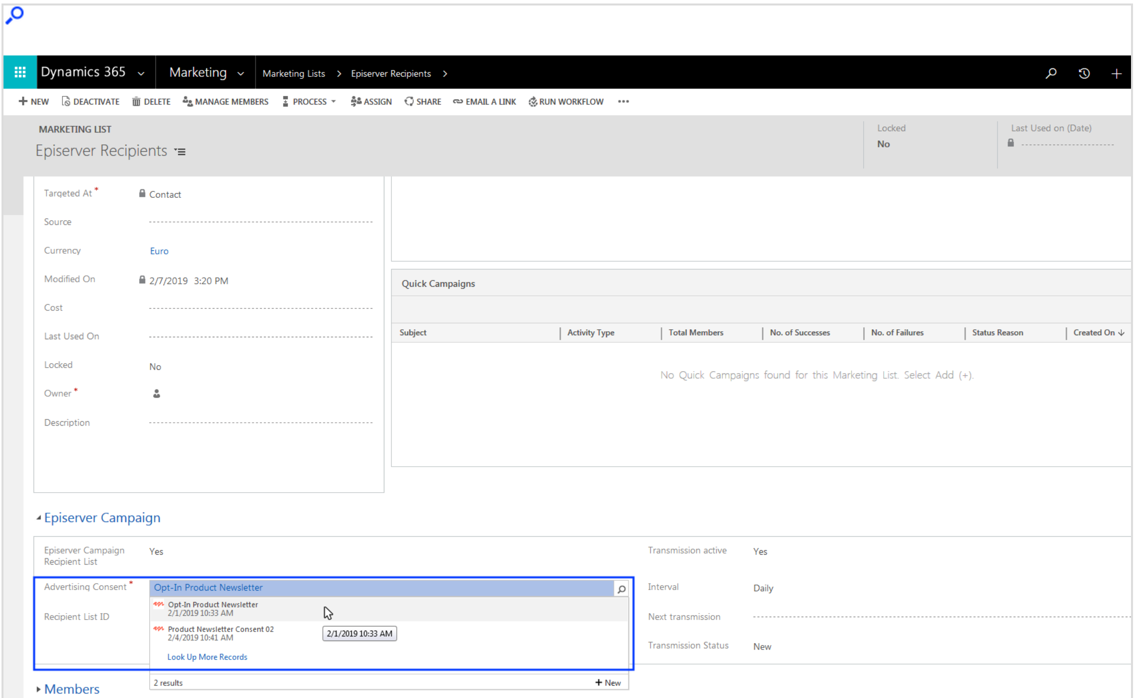


Click **Yes** in the field next to **Transmission active**.

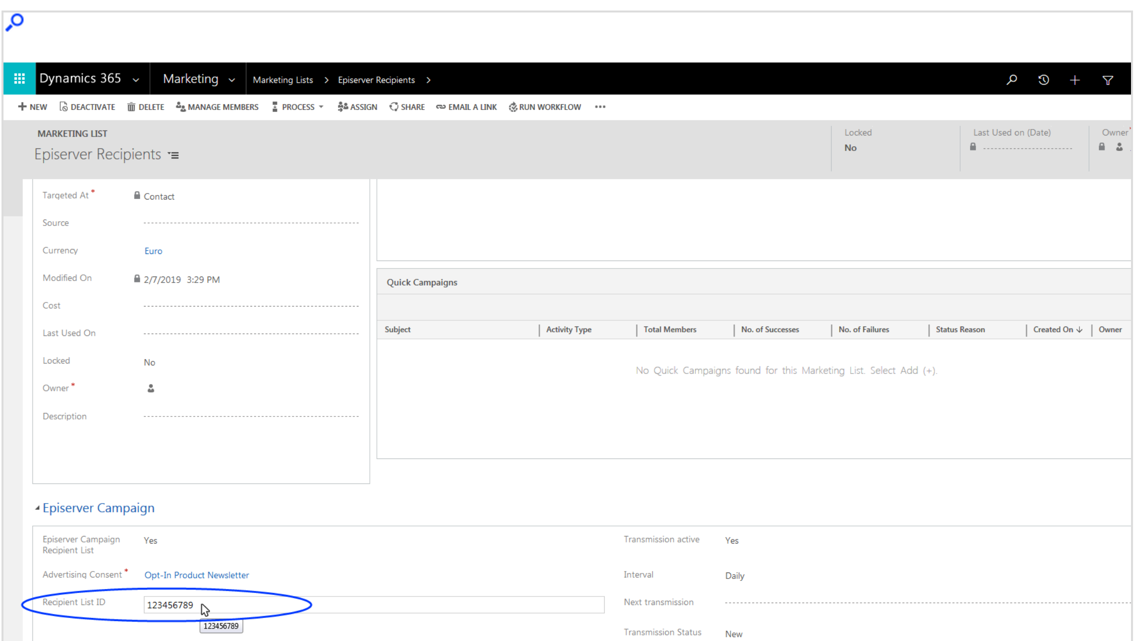


> **Note: Transmission active** must be set to **Yes** for the copying to start. If needed, you can disable the copying later by setting the field to **No**, without losing the configuration.

4. Under **Advertising Consent**, select the marketing permission to be used as criterion when selecting contacts and leads to transfer. Click the magnifying glass symbol in the field and select the relevant marketing permission.

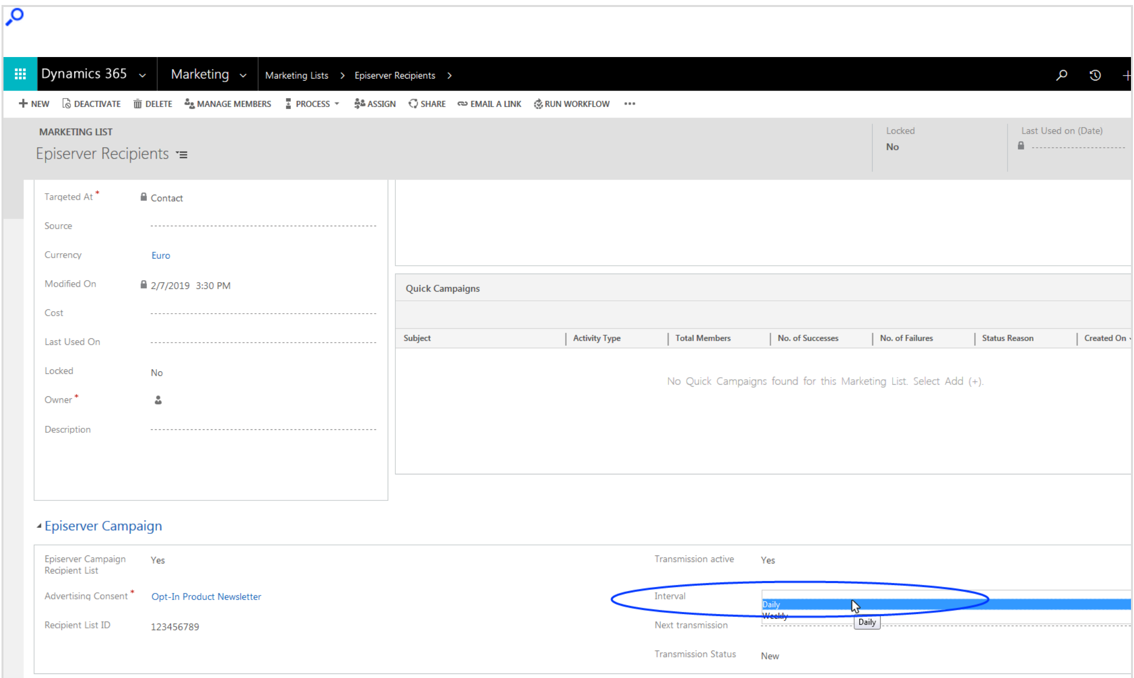


5. In the **Recipient List ID** box, enter the ID of the Optimizely Campaign recipient list into which the marketing list is to be copied.



> **Tip:** To see the recipient list ID, open the Optimizely Campaign menu and select **Administration** > **API overview** > **Recipient lists**.

6. Under **Interval**, select the time interval for the copying (daily or weekly) by clicking in the field.



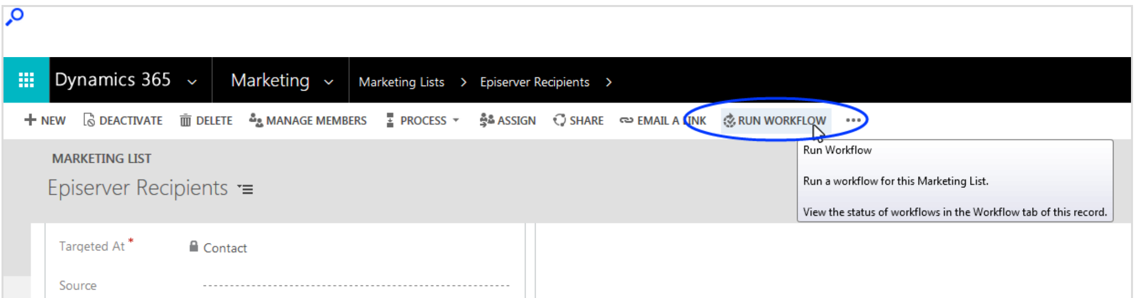
7. When done, click the disc symbol at the bottom right to save.

If the copying process is running successfully, the **Transmission Status** field will show **Running**. If there is an error, the status field will show **Error**. See Maintenance and Troubleshooting) for error messages.

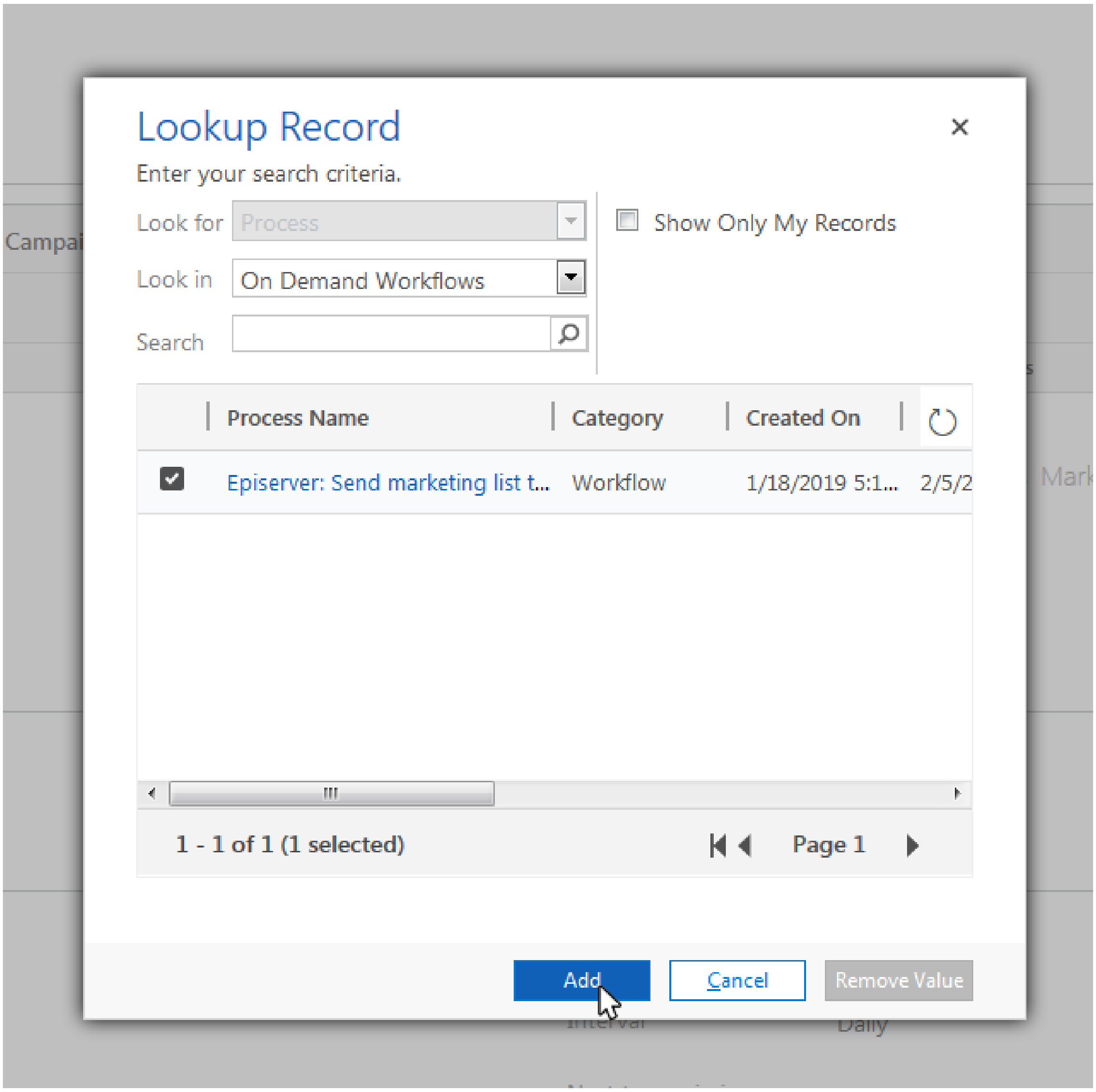
Starting and monitoring copying workflows

Starting the workflow

1. Click **Run Workflow** in the campaign activity screen in Microsoft Dynamics CRM.



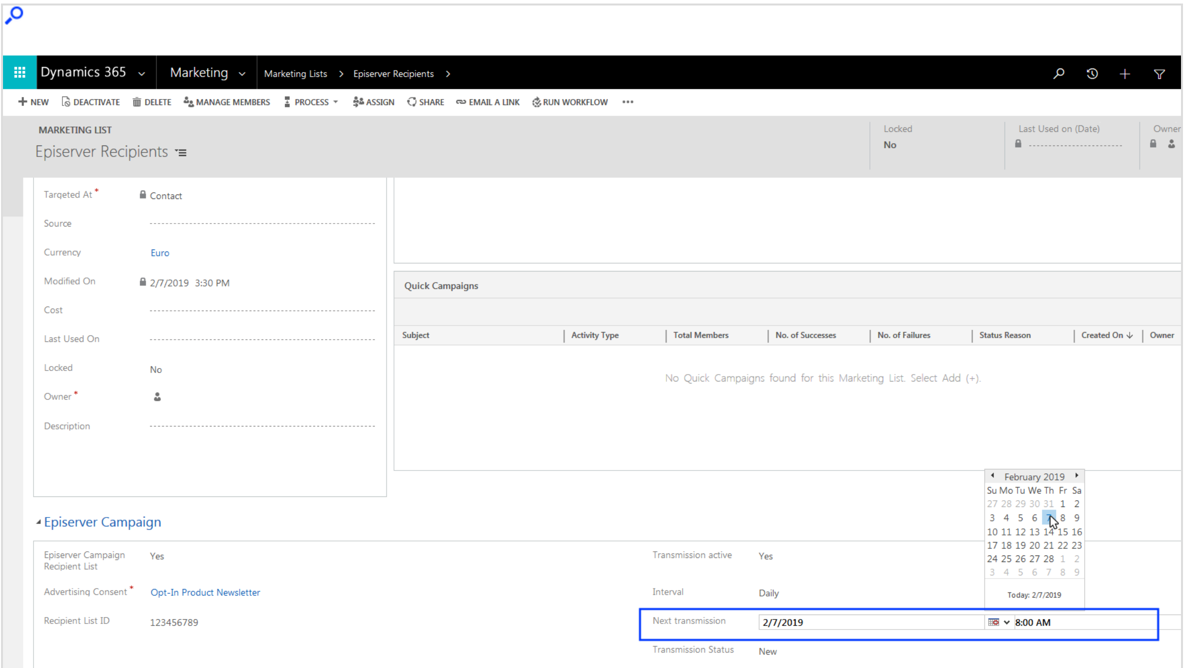
2. Select **Episerver: Send marketing list to Episerver Campaign** and click **Add**.



Monitoring workflow activity

You can view the current status of the workflow at any time under **Settings** > **System** > **System Jobs**.

If the workflow fails, the time for **Nächste Übertragung** (**Next Transmission**) is automatically changed to the next day or week. To export the marketing list before the next automatic export after resolving the error, click in the field next to **Nächste Übertragung** (**Next Transmission**) and select the date and time.



Feeding response data to Microsoft Dynamics CRM

> **Note:** This topic is for administrators and developers with administration access rights in Microsoft Dynamics.

This topic describes how to send recipient response data back to Microsoft Dynamics CRM, when integrating this with Optimizely Campaign. By default, the response data is accessed hourly.

The response data includes:

- Mailing opened
- Link clicks in the mailing
- Direct replies to the mailing

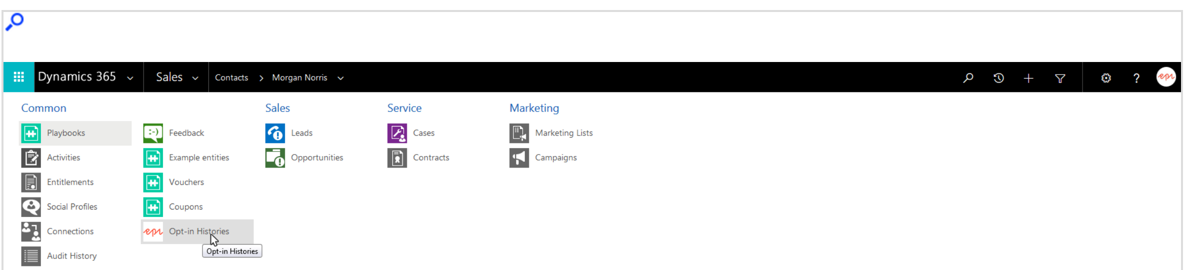
- Unsubscribes (opt-outs)
- Bounced recipient email addresses

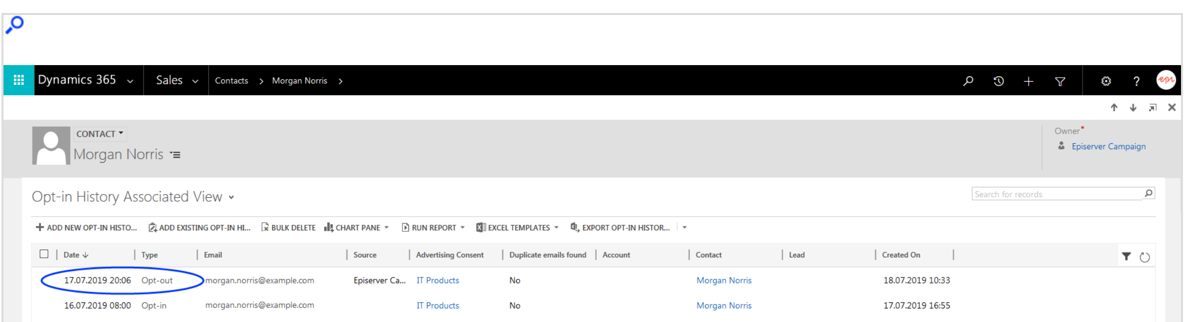
> **Note:** To display unsubscribes (opt outs) and outbounces, the required fields must first be configured. See Configuring the integ-ration.

Unsubscribe (opt out)

When an unsubscribe is registered in Optimizely Campaign, this information is transferred to Microsoft Dynamics. As a result, the lead or contact's advertising consent gets an opt-out entry in the opt-in history. If the most recent entry for an advertising consent according to the time stamp is an opt-out entry, the contact or lead no longer receives a newsletter. Furthermore, with a current opt-out entry, there will be no transmission of recipient data when the marketing list checks for the existence of advertising consent during synchronization.

If the contact or lead has given his advertising consent for more than this newsletter, all other subscriptions remain active.





Outbounce

> **Note:** The display of outbounces requires the configuration of the field in the form. See Creating consents and linking to client.

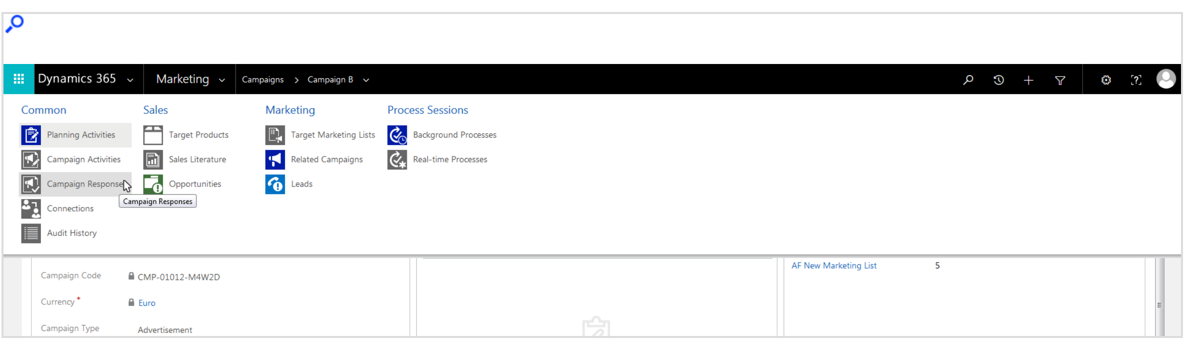
If Optimizely Campaign detects that an email is no longer reachable, the outbounce status is changed from **No** to **Yes**. This status applies to all advertising consents on the channel and across all clients – regardless of whether the outbounce was registered in every client.

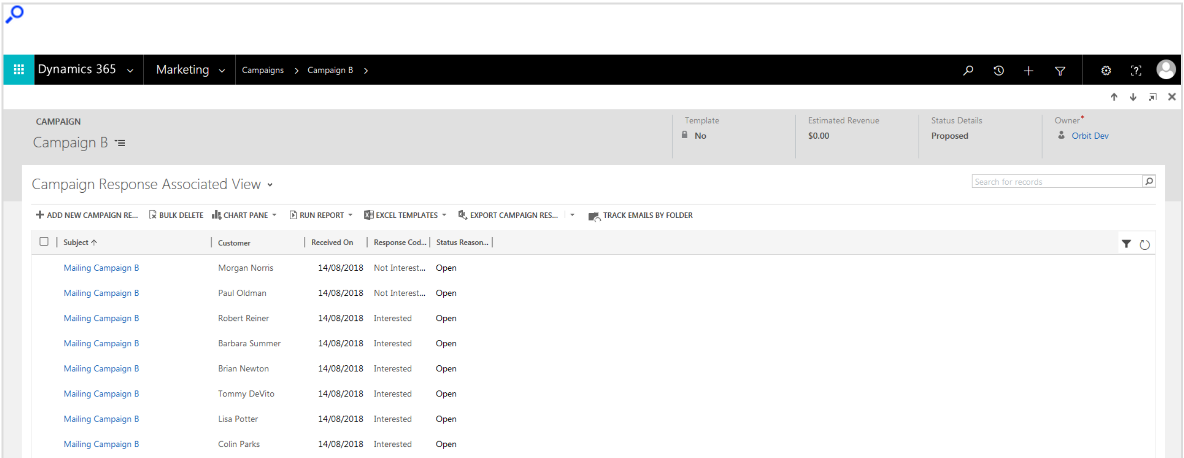
Opens, clicks, and direct replies

When a campaign is run, opens and clicks are imported as replies/campaign responses, and assigned to the campaign in CRM (saved in the campaign). The import differentiates between these response categories:

- Open
- Click
- Reply
- Autoresponder
- Unsubscription

Use these categories for further segment in CRM.





> **Note:** Opens, clicks and replies are only imported for mailings sent using campaign management. Opens and clicks from a copied marketing list are not returned to the CRM.

Extended recipient list connector

> **Note:** This topic is for administrators and developers with administration access rights in Microsoft Dynamics.

> **Note:** The documentation refers to connector version 1.584 and higher.

The current version of Microsoft Dynamics CRM cannot address more than 100,000 recipients per campaign. The extended recipient list connector for Optimizely Campaign is an external Windows service that removes the technical limitation and controls campaigns and the transmission of marketing lists with more than 100,000 recipients.

Prerequisites

- Installation file. Contact customer support.
- Microsoft Dynamics CRM online or on-premise (local)
- SQL database, such as LocalDB or SQL Express.
- Port reservation
  1. Open the command prompt as administrator.
  2. Run the `netsh` configuration program.
  3. Reserve the port using the prompt `add urlacl url=http://+:20000/ user-r=domain\username`.

> **Note:** The specification of the port *+:20000* must match the later port specification in the *IntegrationService.config* installation file.

Technical requirements

- SQL server
  - Microsoft SQL Server 2008R2 (all versions with LocalDB) and later
  - Microsoft SQL Azure
- Windows Identity Foundation 3.5 (Windows feature)
- .NET Version 4.6.2

Installation

1. Unzip the installation file that you have received from the customer support.
2. Open the *IntegrationService.exe.config* file in a text editor.
3. Optional: Configure the proxy settings.

```
<add key="proxy.Domain" value= />
<add key="proxy.UserName" value= />
<add key="proxy.Password" value= />
```

```
<add key="proxy.Protocol" value= />
<add key="proxy.Host" value= />
<add key="proxy.CredentialType" value= />
<add key="proxy.Port" value= />
```

> **Note:** The configuration does not replace the proxy configuration for the CRM. This is still necessary for functionalities such as double opt-in or transactional mails.

4. Adjust the *connectionStrings* element as follows:

```
<connectionStrings>

<add name="Hangfire.Storage" connectionString="Server= ; Database=
;
Trusted_Connection=True; MultipleActiveResultSets=true" />

<add name="CRM" connectionString="RequireNewInstance=true;
Url={https://server/organization/}; Domain= ; Username= ; Pass-
word= ;" />

</connectionStrings>
```

Microsoft Dynamics CRM online

- For the *connectionString* parameter, prefix the URL with the parameter *AuthType-e=Office365*; as follows:

  ```
  connectionString="AuthType=Office365;
  Url={https://server/organization/}; Domain= ; Username= ; Pass-
  word= ;"
  ```

- The parameters *Username* and *Password* are required.

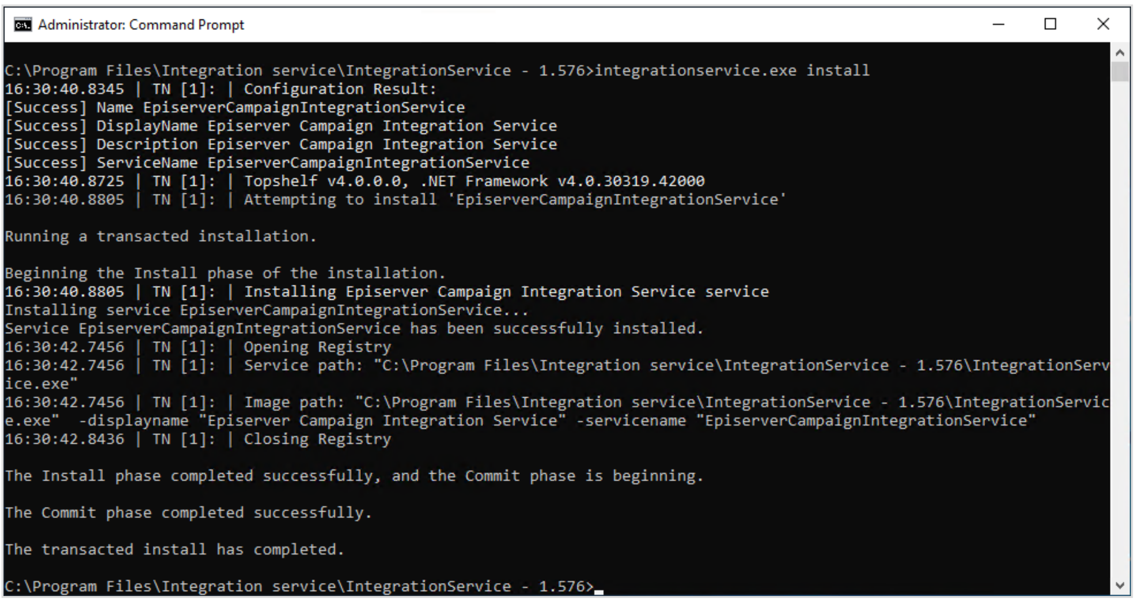
Microsoft Dynamics CRM on-premise

- If you sign in using the following Windows services, the *Domain*, *Username*, and *Password* parameters are not required in the *connectionString*:
  - Microsoft Dynamics CRM Asynchronous Processing Service (MSCRMA-syncService)

© Optimizely 2022

    - Microsoft Dynamics CRM Sandbox Processing Service (MSCRM SandboxService)

5. Save the *IntegrationService.exe.config* file.
6. Open the Command Prompt as administrator.
7. Enter the connector path and install the *Integrationservice.exe* file with the prompt `integrationservice.exe install`.



8. Open Windows Services and start *Episerver Campaign Integration Service.*

> **Note:** If you want to update or modify the configuration, you must first stop the connector via Windows Services.

Configuring the connector

In the *IntegrationService.exe.config* file, you can adjust the following parameters for the data transfer.

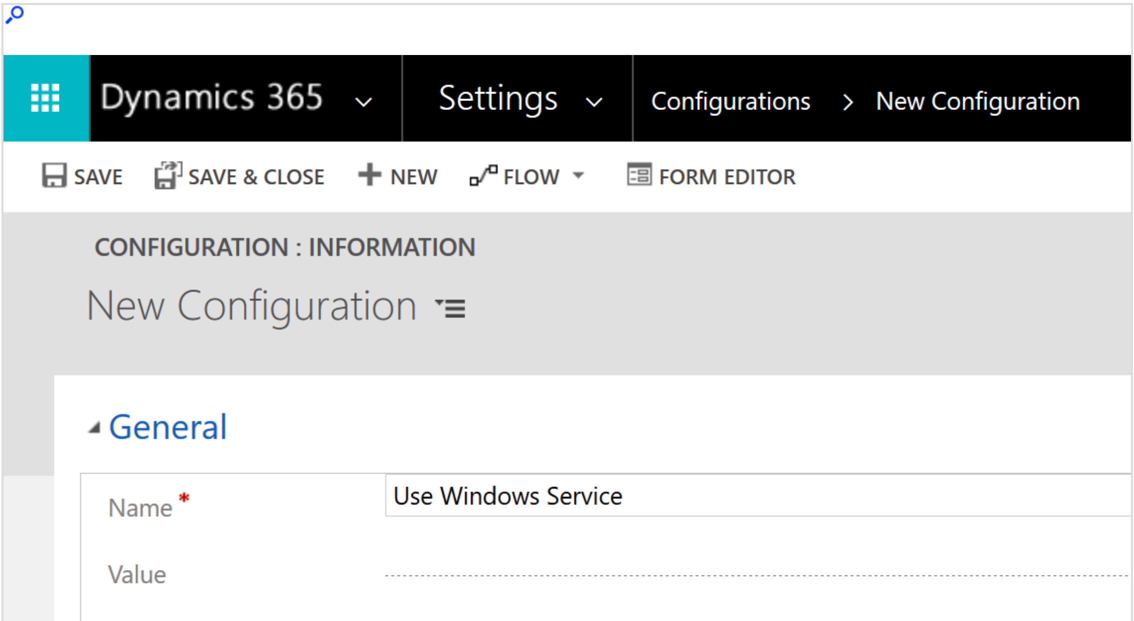
Parameter	Description	Default value
MaxSendRetries	Number of attempts to transmit a recipient package when an attempt fails, for example, due to a timeout.	3
TimeoutCrmConnection	Maximum time in seconds for the transmission of a recipient package from the CRM to the service before a timeout error occurs.	60
TimeoutEpiserverConnection	Maximum time in seconds for the transmission of a recipient package from the service to Optimizely Campaign before a timeout error occurs.	120
UseSoapServiceForRecipientLists	Choice between data transfer via SOAP or REST API. REST API is used by default.	false
BatchSize	Size of the recipient package when transferring from the service to Optimizely Campaign. When transferring using SOAP API, the maximum value is *1000*.	5000
CrmBatchSize	Size of the recipient package when transferring from the CRM to the service.	1000
MaxThreads	Number of parallel threads when transferring via API. The maximum number is *6*.	5

Configuration in Microsoft Dynamics CRM

1. Open Microsoft Dynamics CRM and select **Settings** > **Configurations**.

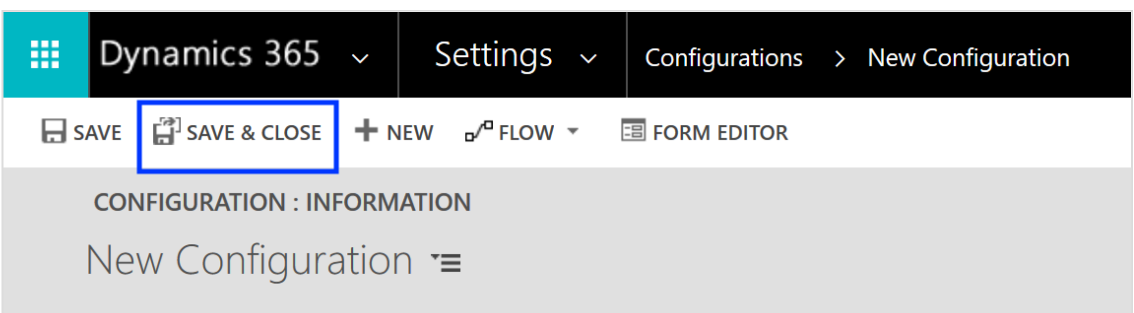
2. Click **New**.

3. Enter the name *Use Windows Service*.



> **Tip:** You can leave the **Value** field blank. No definition is required.

4. Click **Save & Close**.



Troubleshooting

With the **Hangfire** tool you can view and manage planned, running and executed workflows. You install Hangfire automatically with the connector and access the tool in your web browser at the following address: *http://localhost:20000/hangfire*.

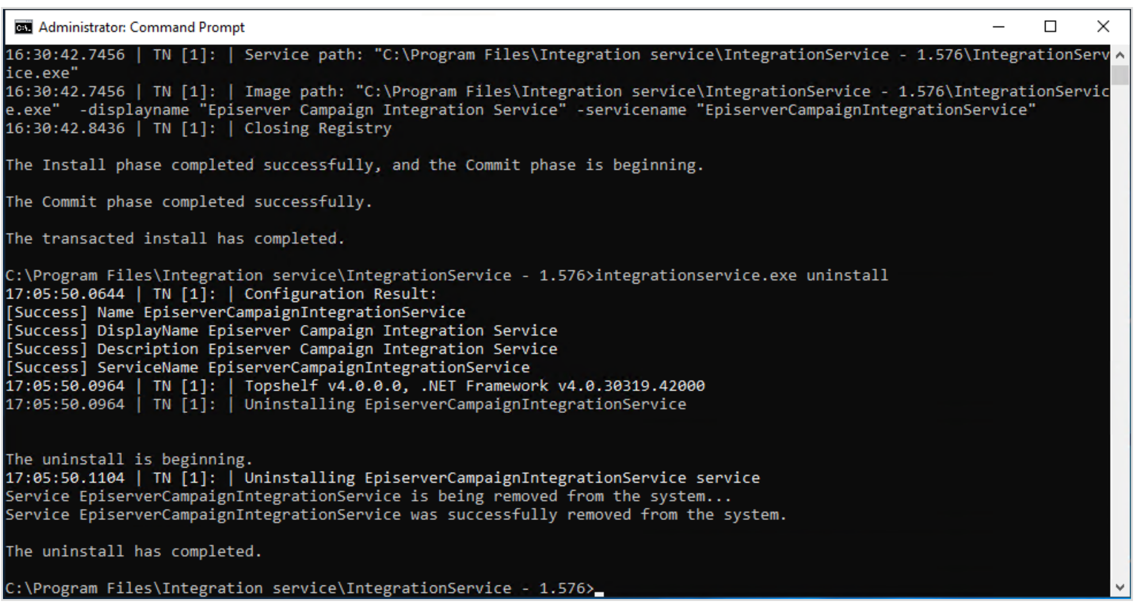
To view the **log data** of the service, open the *logs.txt* file in the installation directory. You can find the log data of the past days in the *archives* folder.

Uninstallation

To uninstall and completely remove the extended recipient list connector, do the following:

> **Note:** The extended recipient list connector must be inactive. Open Windows Services and stop *Episerver Campaign Integration Service*.

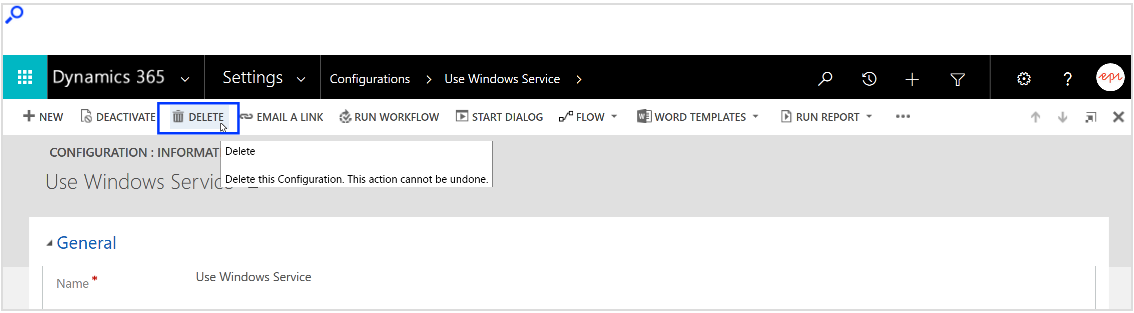
1. Open the Command Prompt as administrator.
2. Enter the connector path and uninstall the *Integrationservice.exe* file with the prompt `integrationservice.exe uninstall`.



> **Tip:** The installation directory still remains. Delete the directory including the log data.

3. Open Microsoft Dynamics CRM and select **Settings** > **Configurations**.

4. Select the *Use Windows Service* configuration data set and click **Delete**.



Troubleshooting and maintenance

> **Note:** This topic is for administrators and developers with administration access rights in Microsoft Dynamics.

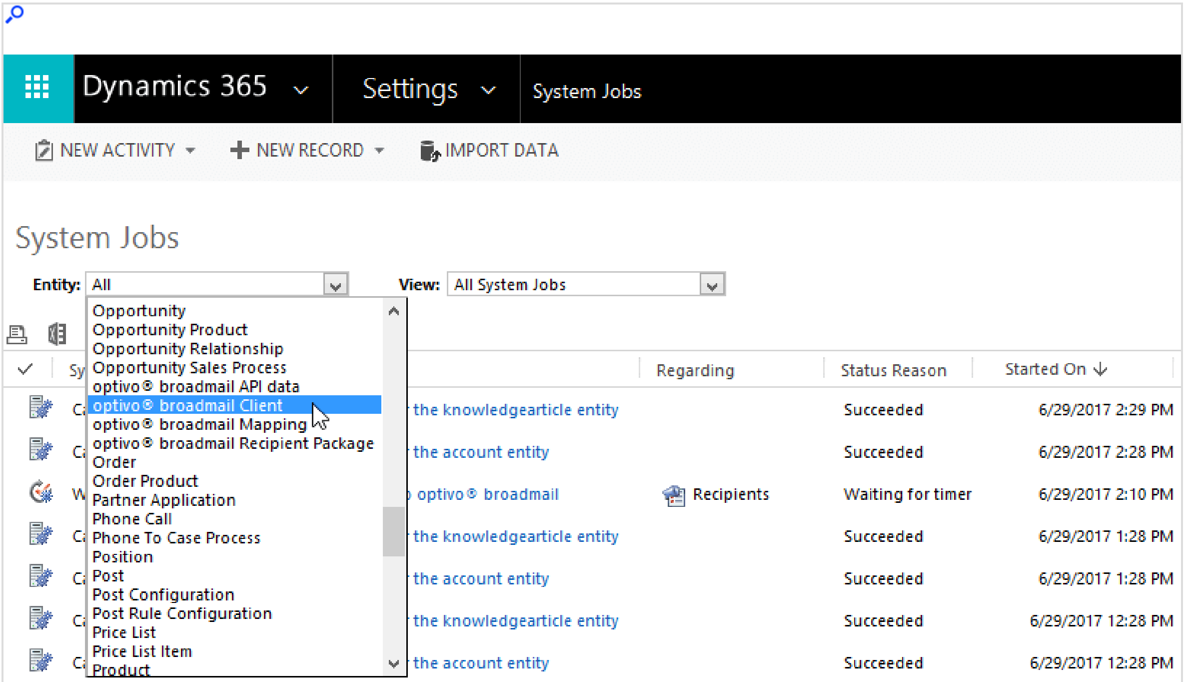
This topic describes how to troubleshoot and maintain the Microsoft Dynamics CRM integration for Optimizely Campaign. The following is included:

- Checking workflows for activity and errors.
- Common error messages.
- Reducing storage space used by the integration.
- Managing divergent time stamps.
- Service updates for Microsoft Dynamics 365 Online

Checking workflows for activity and errors

Active and running workflows are shown in the CRM settings under **System jobs**. You can apply a filter for the Optimizely Campaign workflows under **Entity**. There are these categories:

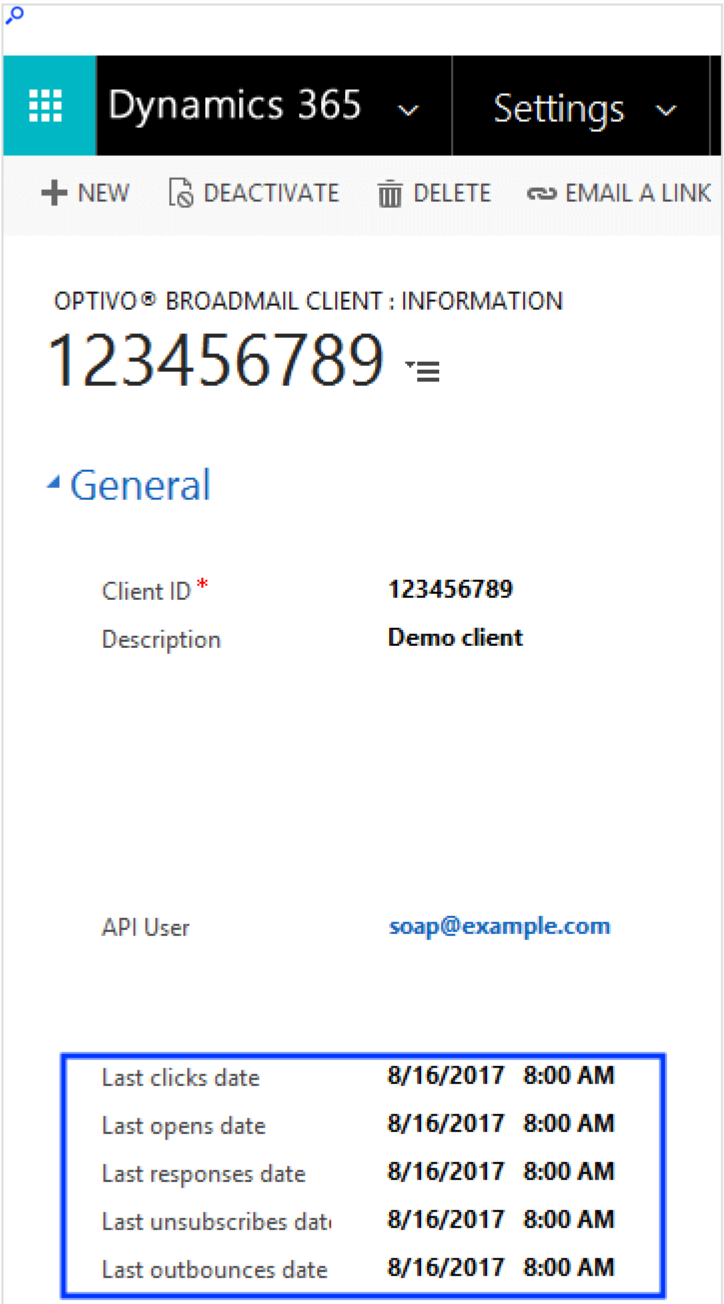
- API data
- Recipient Packages
- Client
- Mapping



Regularly check the **Client** and **Recipient Packages** workflows for errors. See Workflow error messages.

Do the following to check workflow activity for a client:

1. In Microsoft Dynamics CRM, open the settings and click **Clients** under **Episerver Campaign**.
2. Double click the client. The following is under **Information**, providing the time of the last data import:
   - Last clicks date.
   - Last opens date.
   - Last responses date.
   - Last unsubscribes date.
   - Date of last bounce limit overruns.

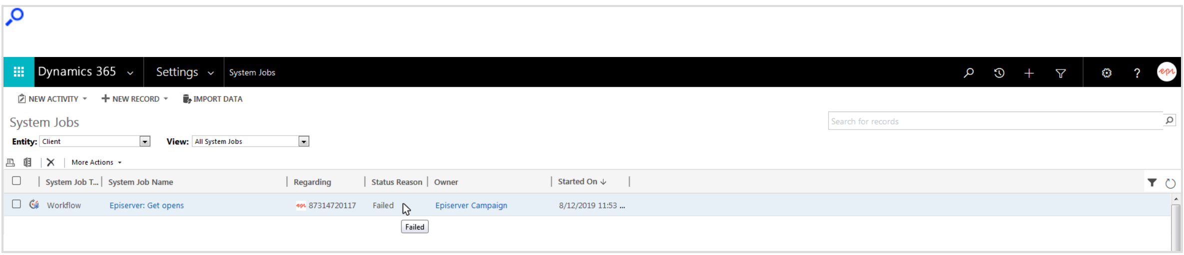


If one or more imports were done more than an hour ago, the workflow is no longer active. This can be due to insufficient resources within the CRM, or a network problem.

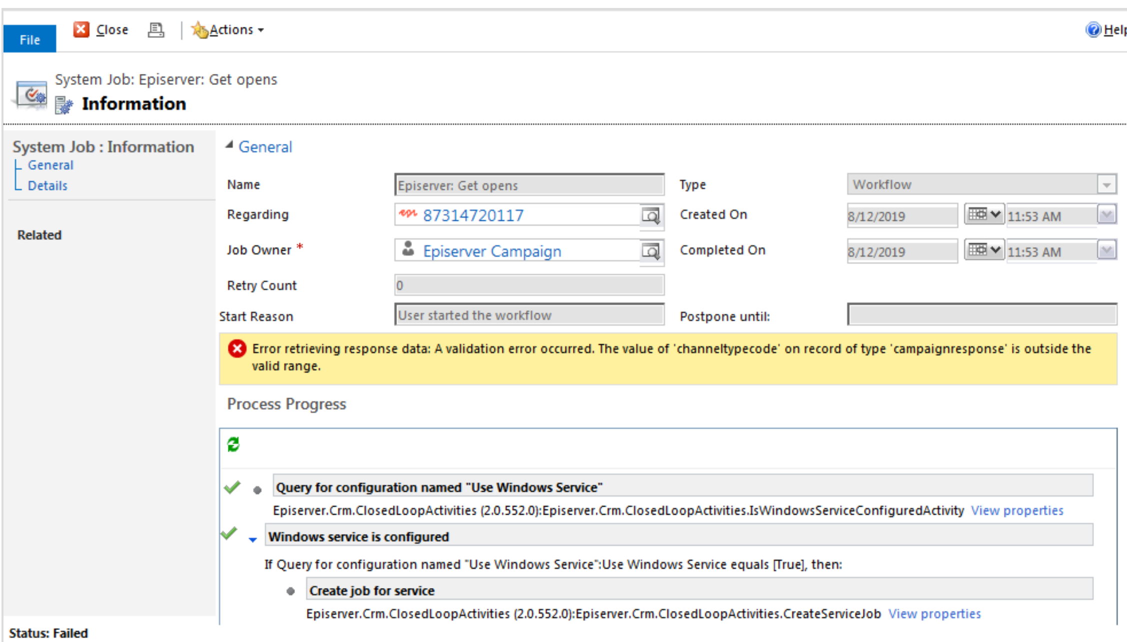
3. Click **Run Workflow** and select the workflow to restart. If the problem persists after restart, contact your system administrator.

Viewing workflow error messages

If a workflow did not run successfully, **Status Reason** under **Settings** > **System** > **System Jobs** shows the message **Failed**.



1. Click the name of the corresponding system job to see a detailed description of the error.



2. Resolve the error.

3. If you are unable to resolve the error, click **Details** to see the trace for the workflow.

4. Copy the trace text and error message with the time stamp for the error, and contact customer support providing the information.

Common error messages

Error message	Description
The specified mailing is not assigned to the mandator.	You have selected a mailing for the campaign that is not assigned to the same client as the selected marketing permission.
The number of flat recipient field values (57) is not a multiple of the number of recipient field names (18).	The configuration of the fields to be transferred does not match the recipient list fields of the Optimizely Campaign client.

Reducing used disk space

Reducing used disk space is optional. The integration operation will not be affected if this is not done. However, you will save storage resources and have a better overview of workflows.

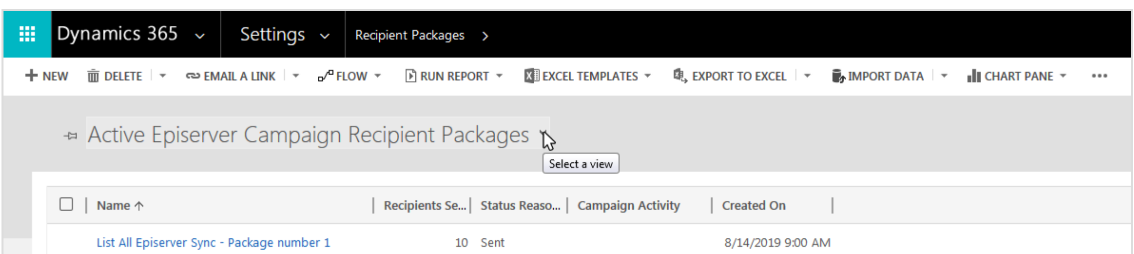
The following options are available:

- Delete recipient packages no longer required.
- Delete completed workflow jobs.

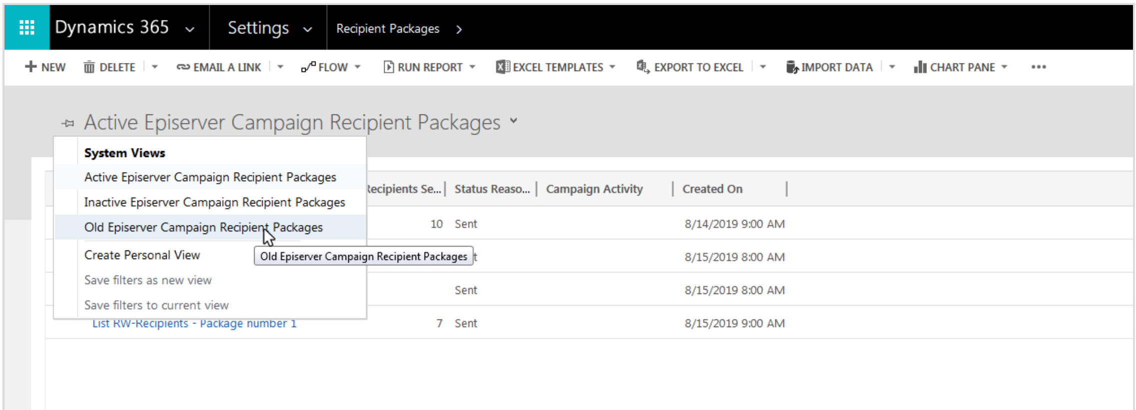
Deleting recipient packages no longer required

1. Open Microsoft Dynamics CRM and select **Settings** > **Recipient Packages**.

2. Click the arrow next to **Active Episerver Campaign Recipient Packages**.



3. In the drop-down list, select **Old Episerver Campaign Recipient Packages**.



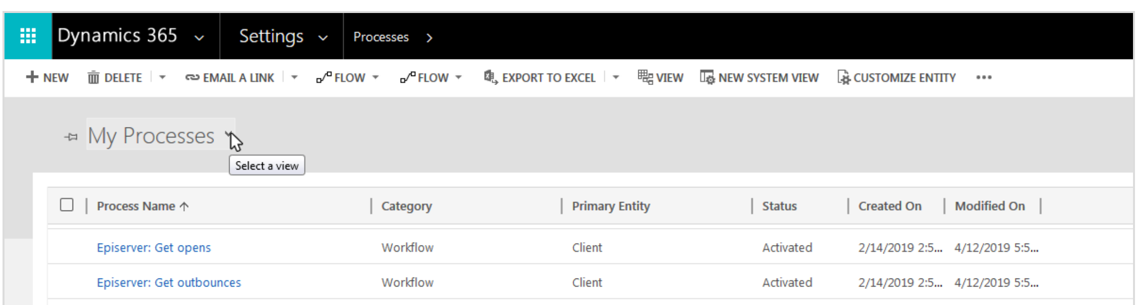
4. Select the recipient package to delete and click **Delete**.

Deleting completed workflow jobs

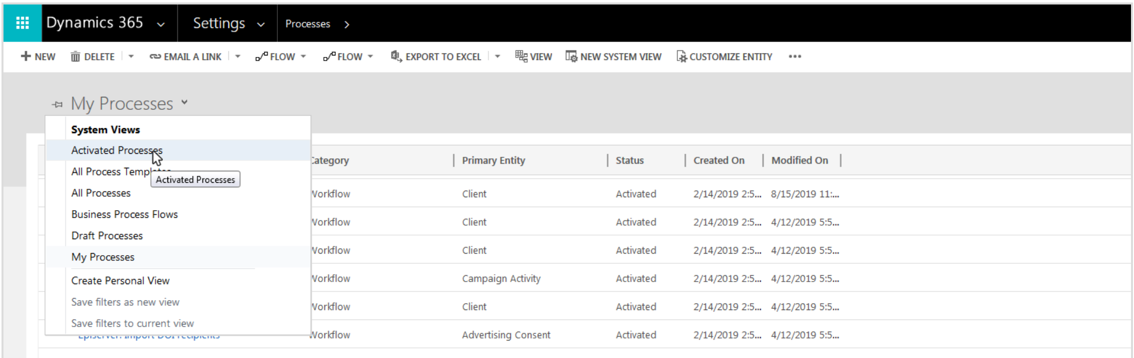
By default, Microsoft Dynamics keeps completed workflow jobs. To configure automatic deletion of completed workflow jobs, do the following:

1. Open Microsoft Dynamics CRM and select **Settings** > **Processes**.

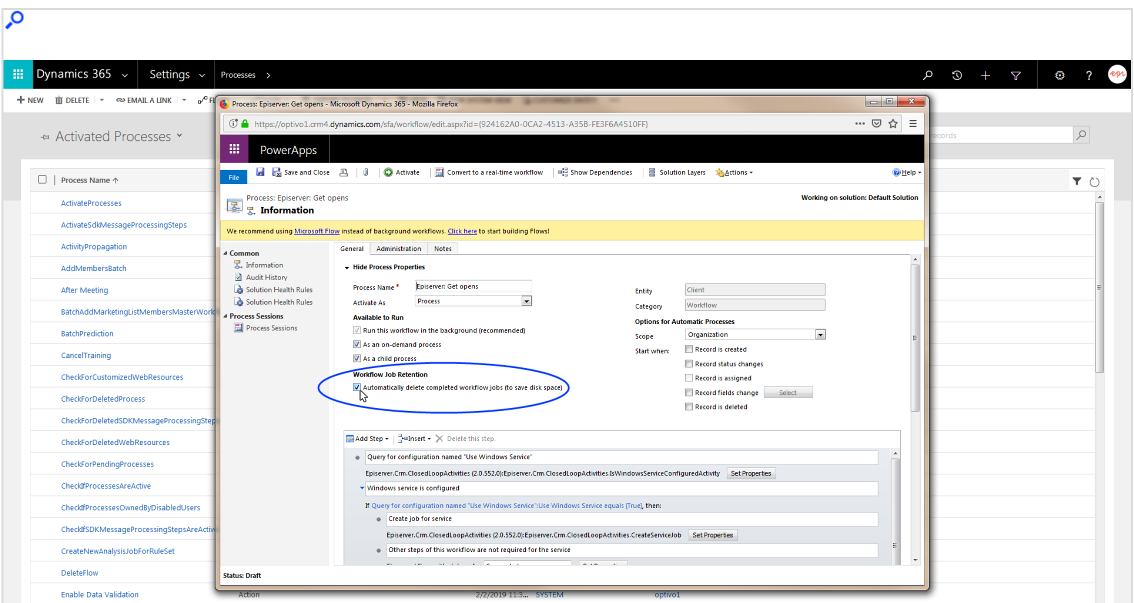
2. Click the arrow next to the title.



3. In the drop-down list, select the corresponding option, such as **Activated Processes**.



4. Click the workflow for which the job should be automatically deleted after completion.
5. Under **Workflow Job Retention**, select **Automatically delete completed workflow jobs (to save disk space)**.



> **Note:** To select the check box you may have to deactivate the workflow for a short period. When you have selected the check box, reactivate the workflow.

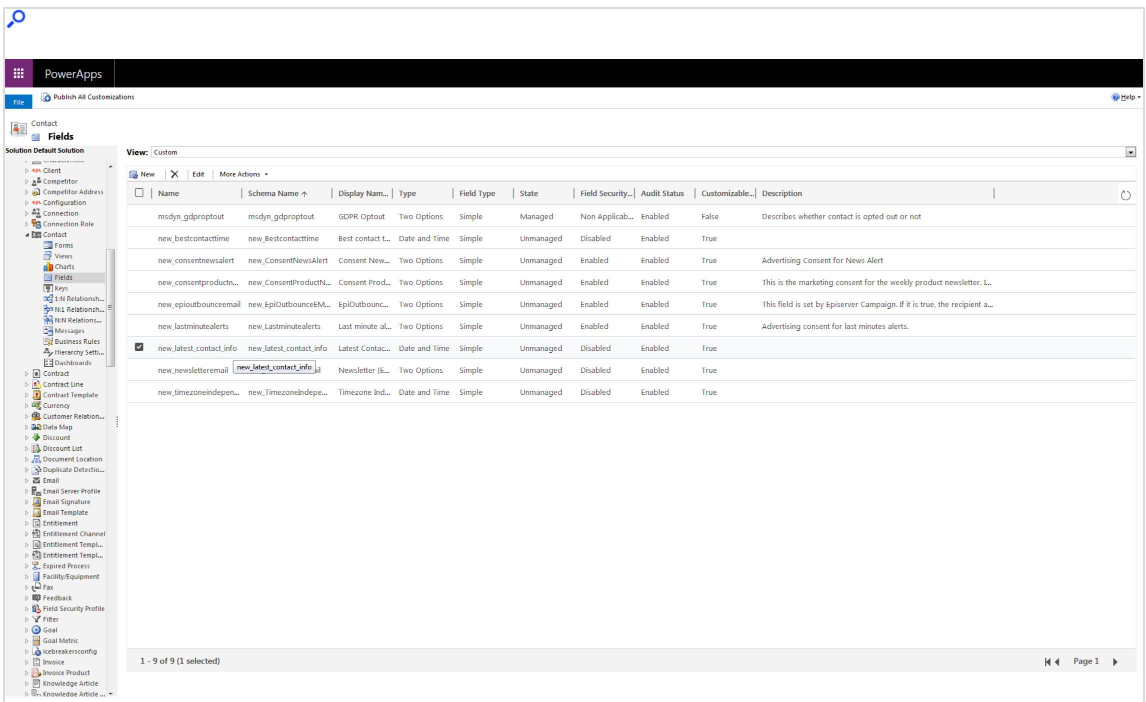
6. Click **Close**.

Managing divergent time stamps

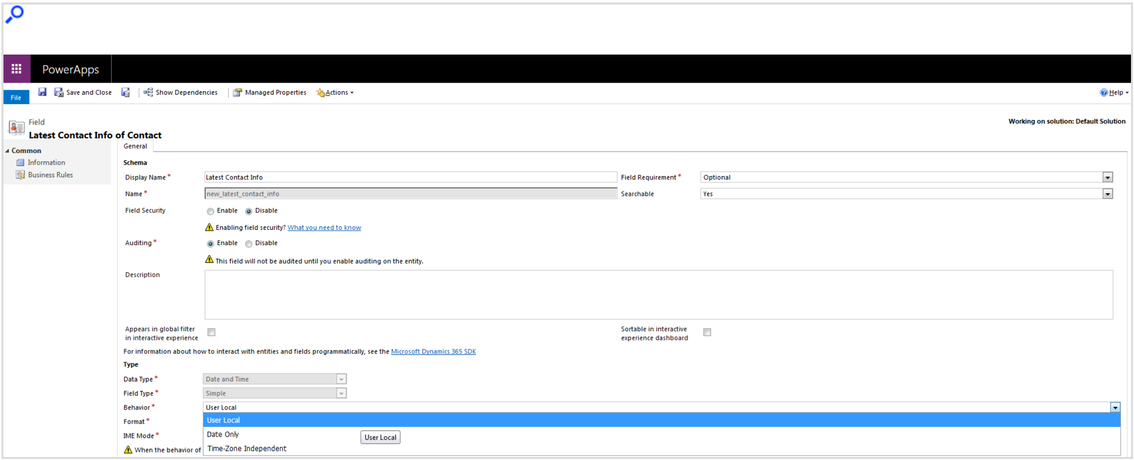
The behavior of the date fields in Microsoft Dynamics CRM can lead to divergent time stamps in CRM and Optimizely Campaign. When using date fields with time specifications, use the *User Local* field type, as this will consider the time zone set for the user during data synchronization.

Do the following to check the data format in the field settings:

1. In Microsoft Dynamics CRM, locate the affected date and time field.



2. Edit the field, and check the properties to see if the field is defined as *User Local*.



If the field is defined as *Time-Zone Independent*, it will not consider the time zone set in CRM. Optimizely Campaign, will convert the time for display to the time zone of the user, so that deviations may occur.

Once the field has been saved in CRM as *Time-Zone Independent*, it can no longer be changed. In this case, the field should be deleted and recreated.

Service updates for Microsoft Dynamics 365 Online

Microsoft releases service updates for Microsoft Dynamics 365 Online on different times without an announcement. Service updates might affect the functionality of the Microsoft Dynamics CRM integration for Optimizely Campaign. Optimizely cannot exclude possible malfunctions in advance. For more information about service updates, see Microsoft Support.

Translation interface

> **Note:** To enable this feature, contact customer support.

This topic describes the semi-automatic translation interface for Optimizely Campaign that lets you create and send mailings in multiple languages. You select the mailing, source and target language, order the translation and Optimizely Campaign notifies you as soon as the mailing is ready for dispatch in the desired language versions.

How it works

Optimizely Campaign creates an XML file with the content for translation and sends it via email to the translation service provider you specified.

When the translation is ready, Optimizely Campaign generates a new mailing from it in the target language. As soon as all requested language versions are available, the mailing can be sent.

Setup

Optimizely customer support sets up the translation interface for you. Provide the following information:

- Users who are to access the translation interface
- Email address to which translation orders are to be sent. This can be a translation agency or a colleague from your company.

> **Tip:** You can specify a different email address for each language.

Ordering translations

1. Open the Optimizely Campaign menu and select **More** > **Mailing-Übersetzung starten** (Start mailing translation).
2. Under **Mailing**, select the desired mailing.
3. Select the source and the target language. Use multiple selection (CTRL + left mouse button) to select multiple target languages.

> **Tip:** You can add a comment to your translation order and specify, for example, whether and how image names and URL addresses are to be translated.

4. Confirm the order by selecting the check box.
5. Click **Übersetzung starten** (Start translation). Optimizely Campaign sends an email with the content to be translated to the translation agency. The XML file contains information about the source language and the target language.

6. The translation service provider sends back an email with the translated texts. The service provider must enter the translations in the XML file sent by Optimizely Campaign and return it to Optimizely Campaign as an email attachment.

7. Optimizely Campaign checks the translation for formal correctness and completeness. If errors occur, the process is terminated and an error message is sent to all parties. If the translation is technically correct, the original mailing is copied and all text modules are exchanged for the new texts in the XML file.
8. The persons in charge specified by you receive a success message and the translated mailing is ready for dispatch.

> **Tip:** If your recipient list contains information about the language of the recipients, you can control the recipients of the respective language version using a recipient data-based target group.

Closed-loop interface

This topic describes the closed-loop interface that is used for bi-directional handling of actions and data exchange between Optimizely Campaign and external systems. For example, using the closed-loop interface, you can create and send personalized newsletters automatically in Optimizely Campaign from an external campaign management system.

Setup

Contact customer support regarding setup of the closed-loop interface, and terms and conditions that apply when accessing this type of non-anonymized action-based data.

> **Tip:** Because the response data consists of non-anonymized action-based data, you have to indemnify and hold Optimizely harmless in advance from any potential liabilities and third-party claims which may result from making this functionality available to you.

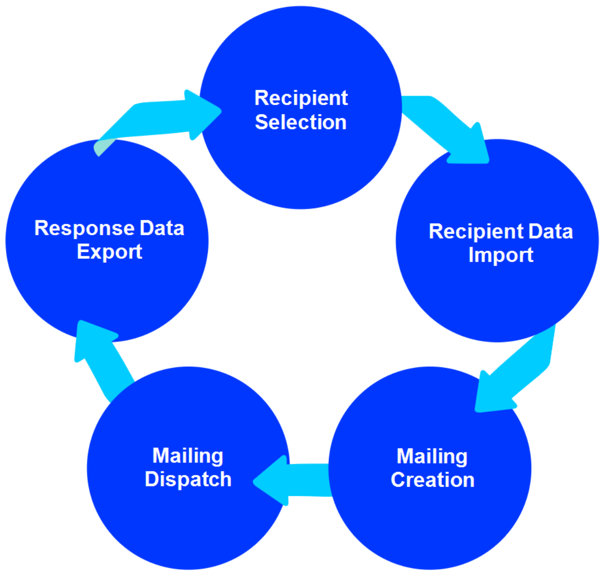
How it works

The closed-loop interface consists of two modules: the *import module* and the *response data export*.

To create and send mailings automatically, you must first create a source mailing in Optimizely Campaign and submit the mailing ID to your external system, for example, a campaign management system (CMS). In the CMS, you select the recipients and provide the recipient data.

The *import module* transfers the recipient data including the ID of the source mailing to Optimizely Campaign. After the import, you receive a status notification. In Optimizely Campaign, a campaign copy is created with the personalized content (for example, product recommendations) and the mailing is sent - either directly, or at a specified time. Optionally, you can resend the mailing manually if recipients have generated soft bounces, for example.

The *response data export* transfers the response data (opens, clicks, responses, unsubscribes) of the sent mailing back to your CMS. You can then process the response data further in the CMS or a third-party system, such as a data warehouse.



The import module and the response data export can be configured and used independently of each other.

Exchanging data

The data exchange is done using an SFTP server set up at Optimizely, and recipient data is transferred to that server. Response data is available for download from the same server.

Running transfers must have a *temporary file name* to avoid incomplete file exchange, see Data transfer troubleshooting. Naming conventions are described below.

> **Note:** The data exchange does not respect strict separation of clients. All user data can be transferred through one SFTP account. You can set up client-specific SFTP accounts if required for security reasons. Alternatively, you can set up separate sub-directories in one client. In both cases, the recipient data import module must then commit one file per client/directory.

Transferring recipient data

Recipient data can be transferred at any time to the Optimizely Campaign SFTP server.

The name convention of the transferred files must be as follows:

```
YYYYMMDDHHMMSS_subscribers.csv
```

The recipient file is a CSV file with the following properties:

- Phrase and field lengths are variable within the limits of the recipient list.
- A semicolon (;) is used as separator.
- Line feed is used for line breaks.
- Quotation marks ("") are used as field boundaries. To designate quotation marks within a field, wrap them in quotation marks.
- The file does not contain declarations regarding columns and field lengths.
- Empty fields (NULL) remain empty in a data set. The number of field separators must be constant.

Recipient data is processed automatically every 10 minutes. The SFTP server of Optimizely Campaign provides log files for download within 30 days after creation.

> **Note:** According to the specifications, fields of the main recipient list must be committed. Fields supposed to not contain any value are committed as empty columns. Existing fields and the field sequence are fixed. Do not change them without the consent of both parties.

Using personalization and recommendations

It is possible to enhance the delivered recipient data with *personalization*, for example by adding product recommendations to the mailing.

One or more fields reserved for a product ID are added to the CSV file with the recipient data. Product information (such as title, description, image-URL) for recommended products is transferred in a second CSV file. Product information is inserted into the mailing using field functions and a placeholder. Assigning product IDs to recipients is done by the customer.

With web analysis software, recommendations are available via a CSV file. Other recommended products are assigned to each product. Product information is rendered into the mailing using a special field function, similar to the process described above. You do not need to assign products to a recipient, as this is automatically done by the web analysis software in accordance with the initial configuration.

> **Note:** To add personalized content, you need a new template. Contact customer support.

Creating source mailings and sending mailings

As a basis for the campaign you are going to send, you create a source mailing in Smart Campaigns and submit the mailing ID to the external system. A so called master list serves as recipient list for the source mailing. Placeholders referencing a specific field of the recipient list are inserted into the mailing paragraphs. Using these placeholders you can individually assign and insert product data and other information into the mailing.

To send multiple newsletters, or send newsletters at the same time, you have to create multiple source mailings. The source mailing is never sent and must remain in status **New** or respectively **Activation required**. Do not activate the mailing, otherwise the copy cannot be created. Instead the system automatically creates a copy of it and sends that, so the source mailing can be reused.

> **Note:** If you create a mailing using the REST API, you cannot use the mailing for the closed-loop interface. Create the source mailing *only* in Smart Campaigns.

Triggering the dispatch

When a file containing recipient data is stored in the corresponding directory on the SFTP server, the mailing is sent. Every 10 minutes, a Cron job checks this directory for new files.

If a new file exists, it is imported into the recipient list of the corresponding client, and assigned to the source mailing using the parameter **BROADMAIL_ID**.

There are different ways to add content to a mailing:

- **Directly from the file**. The content is imported along with the recipient data in a CSV file. This method is only applicable for *texts and hyperlinks*.
- **Referenced content**. URLs in the imported CSV files are used to reference the content. When sending the mailing, the content is retrieved from the external server of the customer through the content interface. You can add texts, pictures, attachments, and hyperlinks types of content to a mailing.

When the data is imported, the mailing is automatically sent, and gets a unique ID.

You can send test emails using the closed-loop interface by storing *test data* instead of real data on the server. The CSV file must have the same structure as the file containing the real recipient data. Every time a test email is sent, a new mailing is created in Optimizely Campaign.

> **Note:** Mailings are triggered *only* by storing a file on the server configured for the closed-loop interface. You cannot send mailings by using the Optimizely Campaign user interface.

You can customize the source mailing for different newsletters. Only change the source mailing after the previous mailing is sent. Additionally, ensure that the correct mailing ID of the source mailing is used in the recipient CSV file.

Troubleshooting data transfer

If a problem occurs transferring the data, a notification is sent to an email address configured beforehand. An error file is generated and the transfer stopped. During implementation you can configure the exact interface behavior in case of an error. When the implementation is completed, you can switch off this setting.

If an error occurs, the interface must be restarted in accordance with the error file. These are the cases:

- Data import failed.
- Error when mailing is started after data import.

Errors during data transfer are handled by customer support, since these can only be resolved manually.

Monitoring and sending status

After a recipient data import, the status of the process is sent via email and registered in a log file. This assures that actions within the interface are properly logged and documented in Optimizely Campaign.

Structure of the main recipient list

Column name	Data type	Example	Description
Email	Varchar(255)	`user@example.com`	Email address of the recipient
broadmail_ID	Bigint/Long	`44018617811`	Mailing ID in Optimizely Campaign (broadmail_ID)
WAVE_ID	Bigint/Long	`46623317811`	Identifies the selection/sending wave for unambiguous assignment of user actions. This parameter is optionally set by the external system when importing the recipient data.
Salutation	Varchar(255)		Field from existing recipient list.
First name	Varchar(255)		Field from existing recipient list.
Last name	Varchar(255)		Field from existing recipient list.

> **Note:** The list configuration described above is an example. More fields can be added if required for personalization purposes. Contact

> customer support beforehand, and document them in the interface setup.

Specifying response data

Response data is generated daily from the log files, and is available for download at a configured time via an SFTP server within Optimizely Campaign. The files contain the most recent data. The files containing the mailing data are available for download for 30 days after starting the mailing.

The response data consists of eight CSV files. Each of these can be read as a table. The response data is exported as String data type. You can also convert numeric values such as the mailing and client ID to the Long data type. See detailed type information for each file below.

> **Tip:** The names used in the following documentation are examples. File names can be configured.

Sent mailings

YYYYMMDD_mailings.csv contains mailings sent in the referenced period.

Column name	Description	Example	Key
id (mailingId)	Mailing ID	`51106527229`	Primary key
compoundMasterId	Campaign ID in Smart Campaigns	`71206365463`	
mailingGroupId	Client ID (BROADMAIL_ID)	`44018617811`	
mailing.recipientLists	Recipient list ID	`58243723257`	
started	Start time of the mailing	`2022-01-01 12:07:55`	

Column name	Description	Example	Key
finished	End time of the mailing	`2022-01-01 12:09:10`	

Sending Log

YYYYMMDD_mailingrecipients.csv contains recipient-related data. The sending log refers to the mailings contained in the file **YYYYMMDD_mailings.csv**.

Column name	Description	Example	Key
id (mailingToUserId)	Encoded assignment of the recipient	`25951836752`	Primary key
mailingId	Mailing ID	`51106527229`	Foreign key
mailingGroupId	Client ID (BROADMAIL_ID)	`44018617811`	
userId	Email address of the recipient	`user@example.com`	
created	Sending date and time	`2022-01-01 12:07:55`	
sendingStatus	Sending status	• `sending` - Mailing is sent • `sent` - Mailing was sent • `could_not_be_sent` - Mailing could not be sent	
deliveryStatus	Delivery status	• `OK` - Mailing was delivered • `HARD` - Hard bounce • `SOFT` - Soft bounce	
response.category	Response category	• `unknown` - The recipient sent a response to the mailing	

Column name	Description	Example	Key
		• `bounce` - Soft bounce • `temporary_bounce` - Soft bounce • `fatal_bounce` - Hard bounce • `autoresponder` - Autoresponder	

Links

YYYYMMDD_links.csv contains links from the mailing. Data is only available for links with *activated link tracking.*

Column name	Description	Example	Key
id (linkId)	Link ID	`44018617936`	Primary key
mailingId	Mailing ID	`51106527229`	Foreign key
mailingToUserId	Encoded assignment of the recipient	`25951836752`	Foreign key
mailingGroupId	Client ID (BROADMAIL_ ID)	`44018617811`	
name	Link name	`Impressum`	
url	Link target (URL)	`http://www.example.com`	

Clicks

YYYYMMDD_clicks.csv contains mailing clicks generated by recipients, within the referenced period. Clicked links/URLs can be found in the file **YYYYMMDD_links.csv**.

Column name	Description	Example	Key
linkId	Link ID	`44018617936`	Foreign key
mailingId	Mailing ID	`51106527229`	Foreign key
mailingToUserId	Encoded assignment of the recipient	`25951836752`	Foreign key
mailingGroupId	Client ID (BROADMAIL_ID)	`44018617811`	
userId	Email address of the recipient	`user@example.com`	
created	Date and time of the click **Note:** There can be multiple clicks from one recipient within one second.	`2022-01-01 12:07:55`	
click.browser	Web browser	`Firefox 64.1`	
click.platform	Operating system	`Windows 10`	
click.device	Device type	`Desktop`	

Opens

YYYYMMDD_opens.csv contains mailings opened by recipients in the referenced period.

Column name	Description	Example	Key
linkId	Link ID	`44018617936`	Foreign key
mailingId	Mailing ID	`51106527229`	Foreign key
mailingToUserId	Encoded assignment of the recipient	`25951836752`	Foreign key
mailingGroupId	Client ID (BROADMAIL_ID)	`44018617811`	
userId	Email address of the recipient	`user@example.com`	
created	Date and time when the recipient opened the mailing **Note:** One recipient can open a mailing several times. In this case, each opening generates a singular data set.	`2022-01-01 12:07:55`	
open.browser	Web browser	`Firefox 64.1`	
open.platform	Operating system	`Windows 10`	
open.device	Device type	`Desktop`	

Automatic opens

YYYYMMDD_automated_opens.csv contains automatic opens in the referenced period. See **Apple Mail Privacy Protection**.

Column name	Description	Example	Key
mailingId	Mailing ID	`51106527229`	Foreign key
mailingToUserId	Encoded assignment of the recipient	`25951836752`	Foreign key
mailingGroupId	Client ID (BROADMAIL_ID)	`44018617811`	
userId	Email address of the recipient	`user@example.com`	
created	Date and time of the generated open	`2022-01-01 12:07:55`	
open.browser	Web browser	`Apple Mail Privacy Protection`	
open.platform	Operating system	`unknown`	

Unsubscribes

YYYYMMDD_unsubscribes.csv contains unsubscribes by recipients in the referenced period.

Column name	Description	Example	Key
mailingId	Mailing ID	`51106527229`	Foreign key
mailingToUserId	Encoded assignment of the recipient	`25951836752`	Foreign key

© Optimizely 2022

Column name	Description	Example	Key
mailingGroupId	Client ID (BROADMAIL_ID)	`44018617811`	
userId	Email address of the recipient	`user@example.com`	
created	Date and time of the unsubscribe	`2022-01-01 12:07:55`	

Responses

YYYYMMDD_responses.csv contains emails returned to the sender address from any user within the referenced period.

Column name	Description	Example	Key
mailingId	Mailing ID	`51106527229`	Foreign key
mailingToUserId	Encoded assignment of the recipient	`25951836752`	Foreign key
mailingGroupId	Client ID (BROADMAIL_ID)	`44018617811`	
userId	Email address of the recipient	`user@example.com`	
created	Sending date and time	`2022-01-01 12:07:55`	
category	Response category	• `unknown` - The recipient sent a response to the mailing • `bounce` - Soft bounce • `temporary_bounce` - Soft bounce • `fatal_bounce` - Hard bounce • `autoresponder` -	

© Optimizely 2022

Column name	Description	Example	Key
		Autoresponder	

Transferring files through SCP

This topic describes options for transferring data files to an Optimizely server. This data exchange is needed for various integrations of external systems with Optimizely Campaign.

To upload or download files securely between your computer and the Optimizely server, you use *Secure Copy Protocol (SCP)*, which protects data from third-party access during transmission.

To use SCP, you install an SCP program on your computer, then provide access data for the server and an authentication key. After establishing an encrypted server connection, you can securely exchange files.

These options are available:

- Configuring SCP transfer for macOS/OS X
- Configuring SCP transfer for Windows

Configuring SCP for macOS/OS X

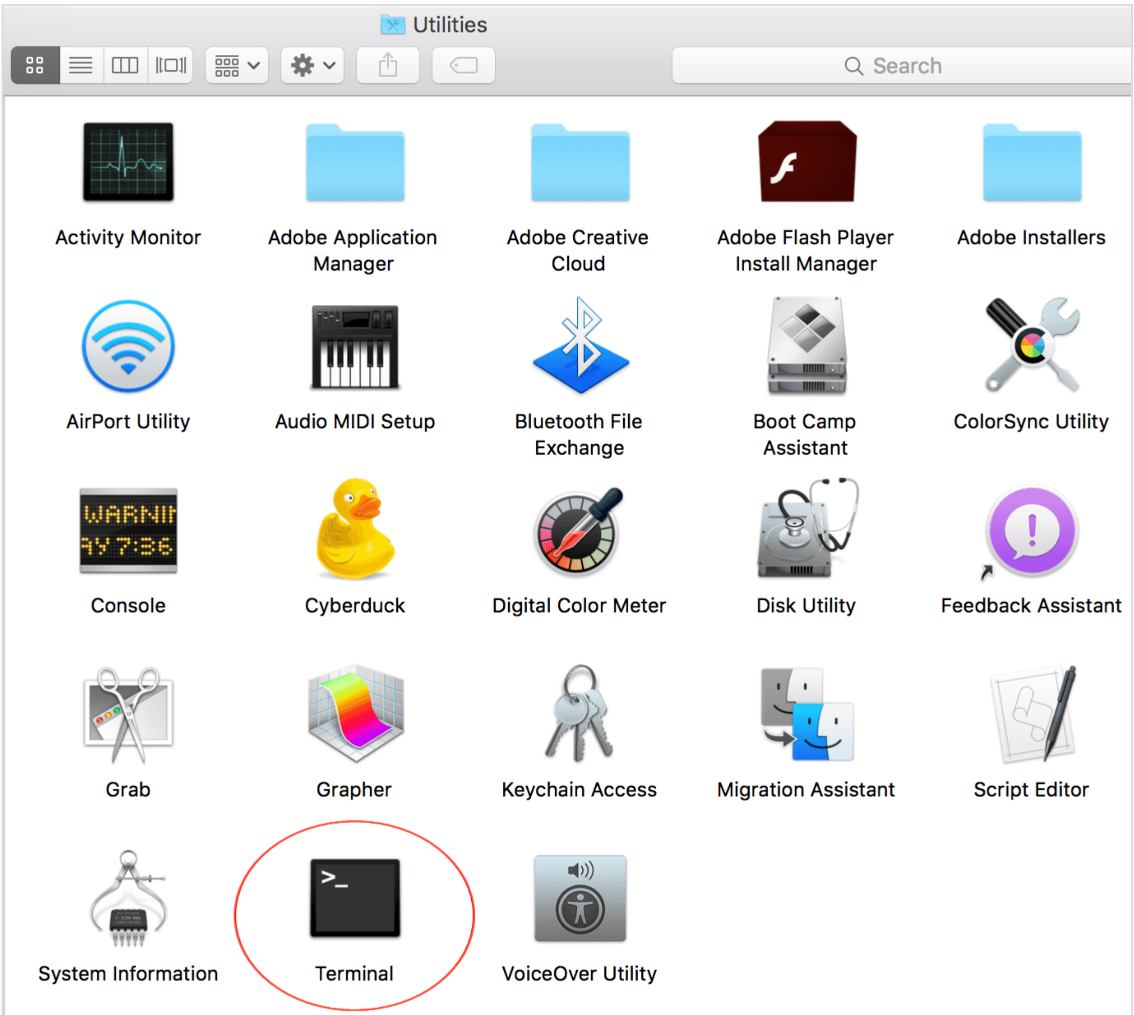
This topic describes how to configure and use secure encrypted data transfer with *macOS* (previously OS X) via Secure Copy Protocol (SCP). File transfer is often needed for data exchange when integrating external systems with Optimizely Campaign.

Configuration steps

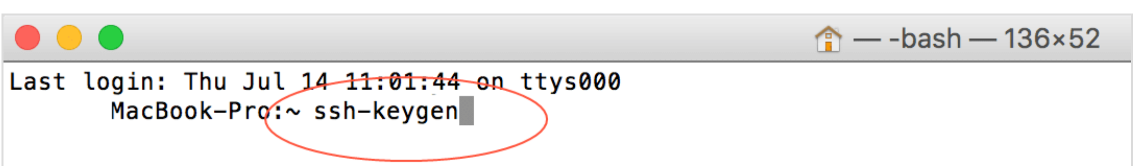
1. Creating a key pair
2. Downloading and installing Cyberduck
3. Downloading and installing Cyberduck
4. Establishing an SCP server connection

Step 1: Creating a key pair

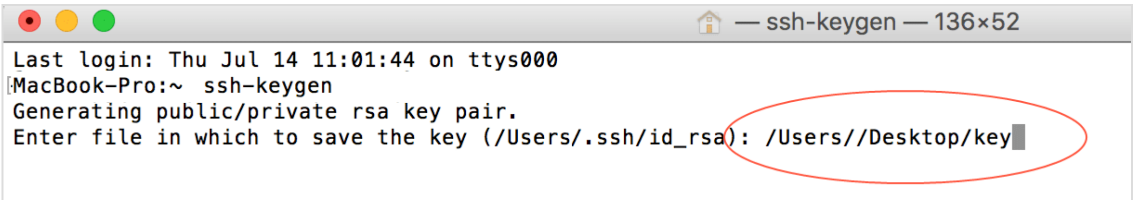
1. From the **Utilities** folder, open **Terminal**.



2. Enter `ssh-keygen` and press **Enter**.

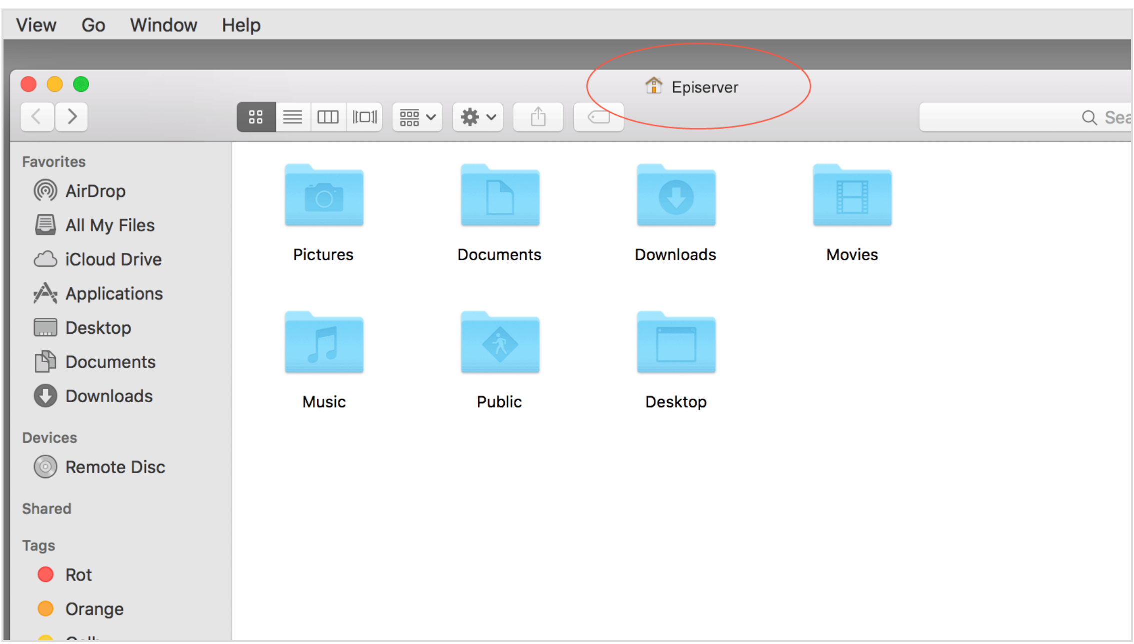


3. Enter a file path and file name for the key pair. For example, to save the key pair to your desktop in a file called **key**, enter `/Users/<name of your user folder->/Desktop/key`. Press **Enter** to confirm.



By default, **Terminal** suggests the hidden **.ssh folder** in your user folder as the file location, and the **id_rsa** as the file name. Unless changed, the key pair is saved in that directory using that file name. The *private key* is given the **id_rsa** file name, while the *public key* is assigned the **.pub** extension. In this example, the public key name is **id_rsa.pub**.

> **Note:** To see the name of your user folder, click **Go**>**User folder** in the **MacOS Finder** menu. Finder opens a window with the user folder name at the top.



4. In the **Enter passphrase** dialog box, enter your password (not visible).

```
— ssh-keygen — 136×52
Last login: Thu Jul 14 11:01:44 on ttys000
-MacBook-Pro:~ ssh-keygen
Generating public/private rsa key pair.
Enter file in which to save the key (/Users//.ssh/id_rsa): /Users/Desktop/key
Enter passphrase (empty for no passphrase):
```

> **Note:** Remember your password, you need it later to establish a server connection.

5. Re-enter your password and press **Enter**.
6. The key fingerprint is shown in the **Terminal** window following **The key fingerprint is:**. Copy the key fingerprint to a text document and save it.

```
-bash — 132×53
Last login: Thu Jul 14 11:02:22 on ttys000
-MacBook-Pro:~ optivo$ ssh-keygen
Generating public/private rsa key pair.
Enter file in which to save the key (/Users//.ssh/id_rsa): /Users/Desktop/key
Enter passphrase (empty for no passphrase):
Enter same passphrase again:
Your identification has been saved in /Users/Desktop/key.
Your public key has been saved in /Users/Desktop/key.pub.
The key fingerprint is:
SHA256:Lu5/GWBmV5R3MPS0HDHq8yxUV+4Iy52@-MacBook-Pro.local
The key's randomart image is:
+---[RSA 2048]----+
|           ..+==+|
|            = ++O|
|           o = =o|
|          o + o .|
|       +S= + O + |
|       .  * * + .|
|         . O o . |
|     . .   = * o |
|     .o... o .   |
+----[SHA256]-----+
-MacBook-Pro:~ $
```

Step 2: Configuring a user account for SCP access

1. Email your public key (file with .pub extension) to Optimizely customer support.
2. In a *separate* email, send your key fingerprint to Optimizely customer support.

> **Note:** For security reasons, do not send the public key and key fingerprint together.

3. Optimizely customer support configures the account, and sends you an email with your user account data.

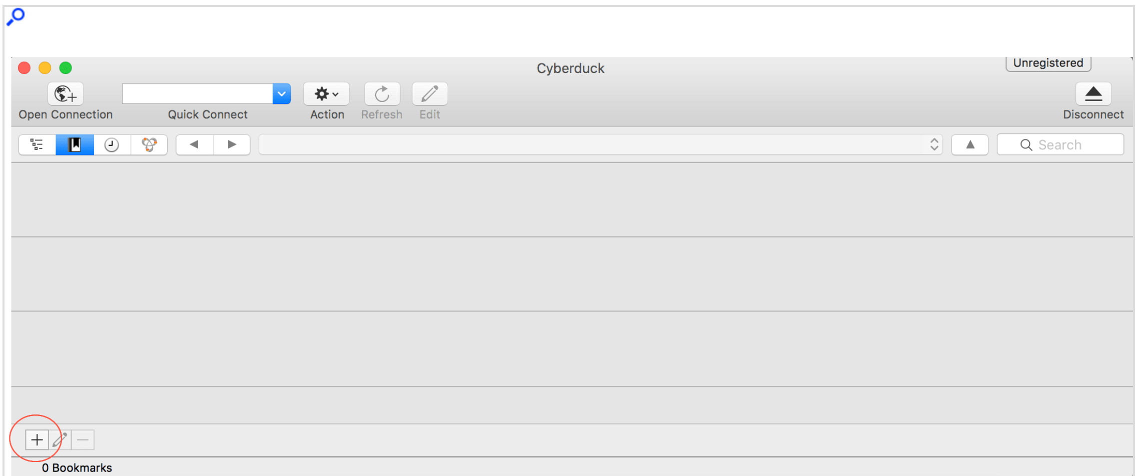
Step 3: Downloading and installing Cyberduck

Cyberduck is a free program used for establishing a connection to the server.

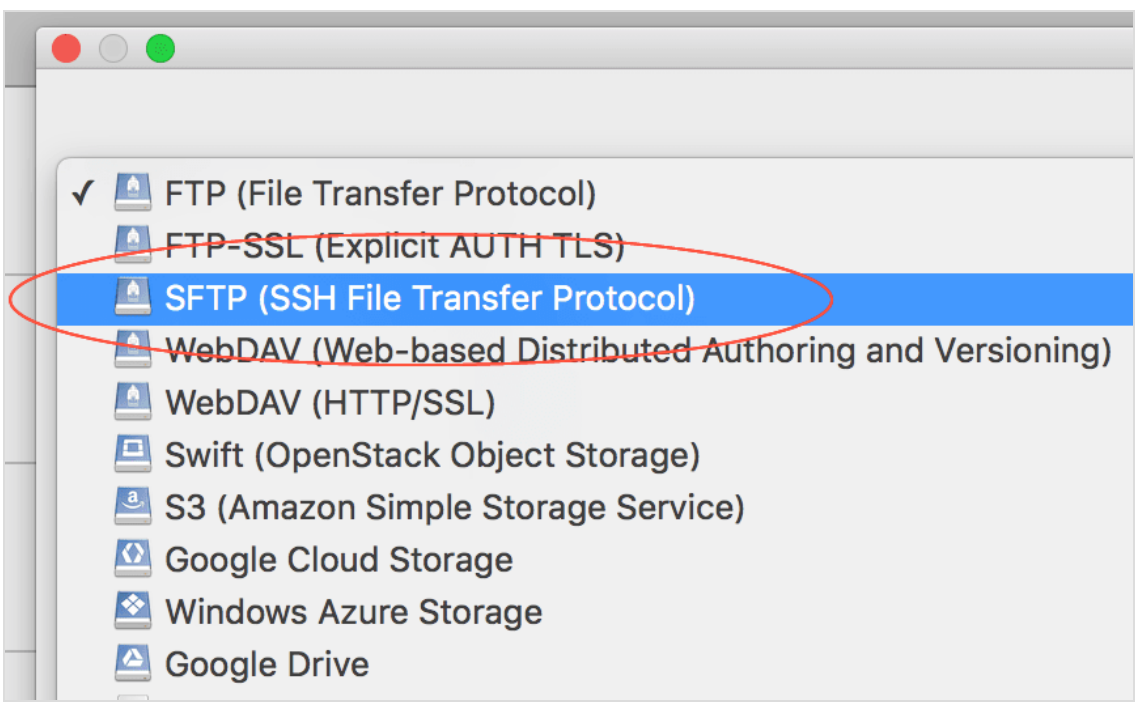
1. Using a browser, go to https://cyberduck.io.
2. Click **Download Cyberduck for Mac**.
3. When the download finishes, open the folder with Cyberduck. No specific installation is required.
4. Optional: move Cyberduck to a permanent folder, such as **Programs** or **Utility programs**.

Step 4: Establishing an SCP server connection

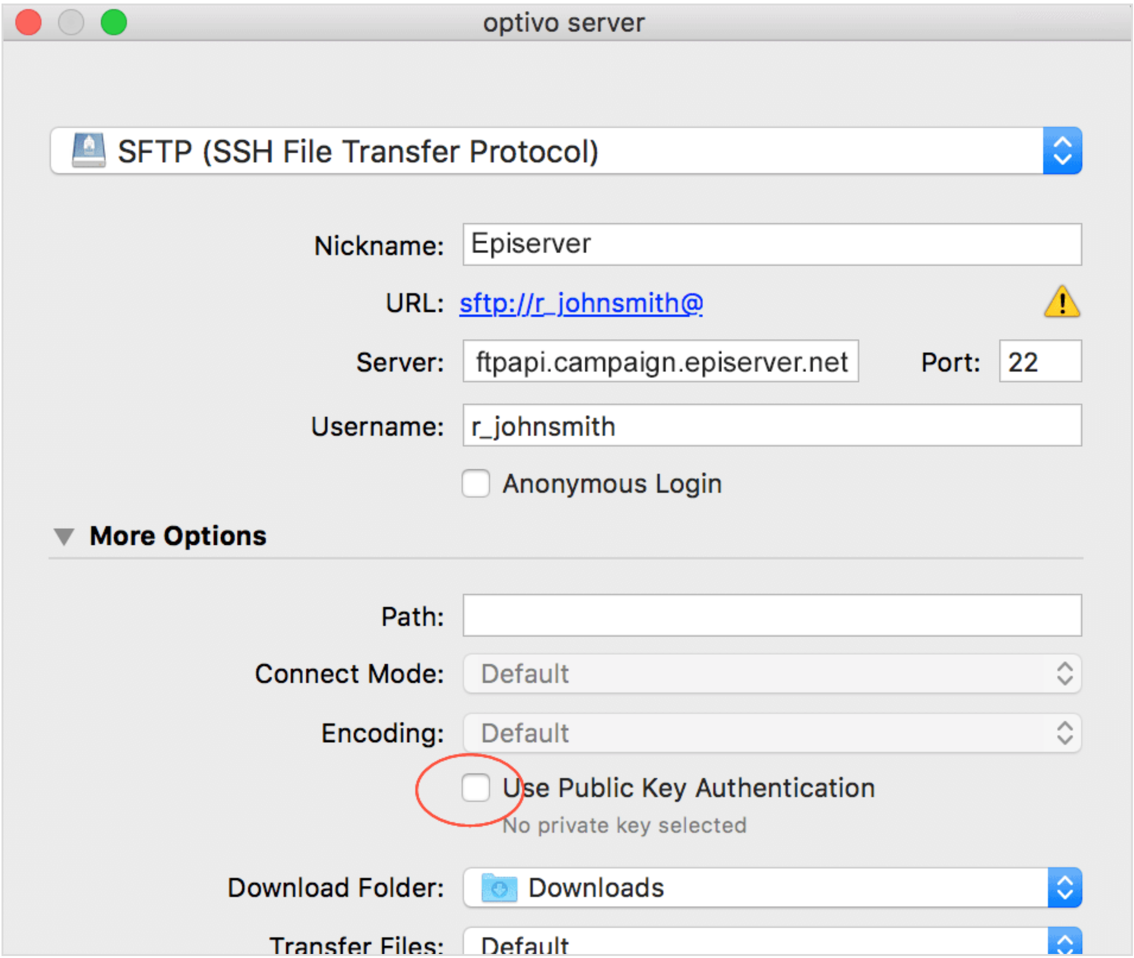
1. Open **Cyberduck**.
2. To create a bookmark for connecting to the server, click the plus icon **+** at the bottom.



3. Click the top options menu and select **SFTP (SSH File Transfer Protocol).**

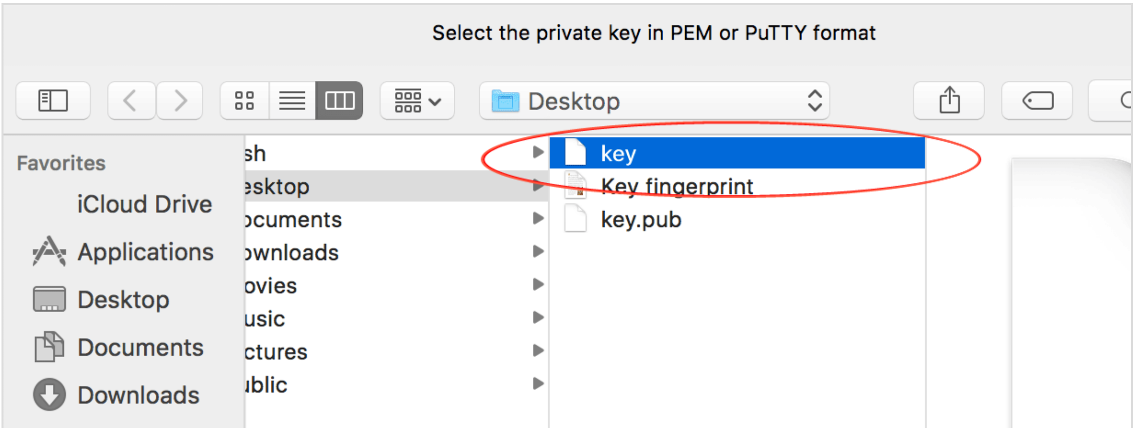


4. Fill out the information as follows.



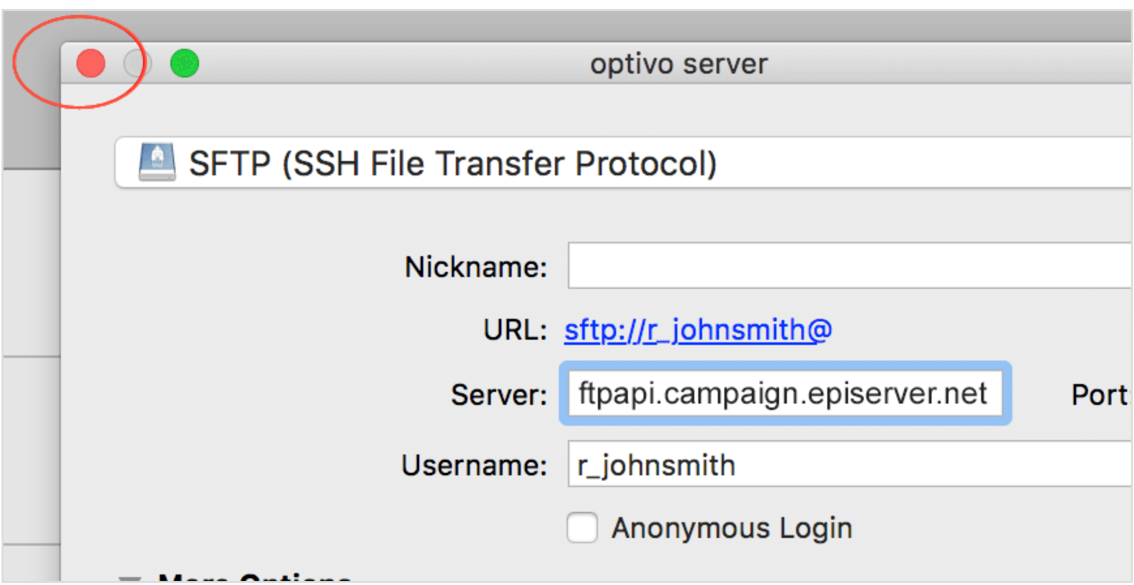
- **Nickame**: Enter a name to the bookmark.
- **Server:** Enter the address `ftpapi.campaign.episerver.net`.
- **Username**: Enter name as provided by Optimizely.
- Open **More options** and enable **Use Public Key Authentication**.

5. Go to your private key folder and select the private key.

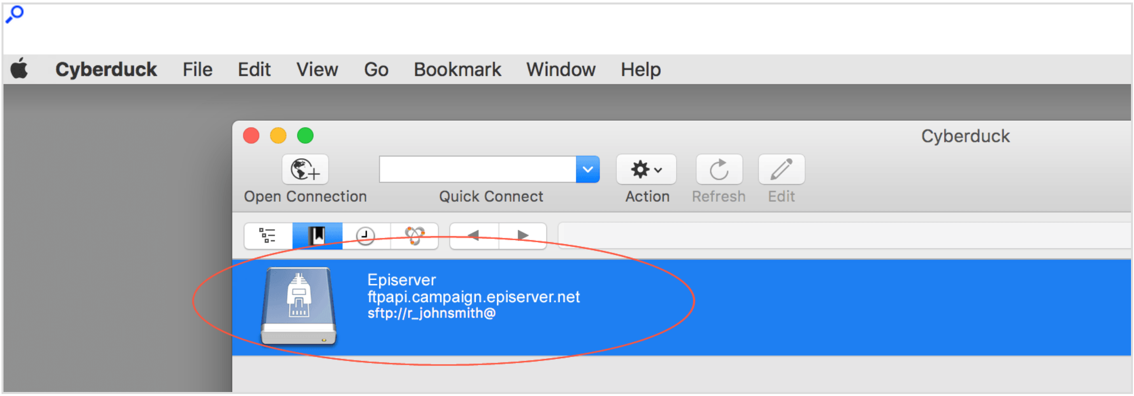


> **Note:** Do not confuse the private key with the public key. For the **Use Public Key Authentication** option, use your private key.

6. Click **Choose** on the bottom-right.
7. Close the bookmark configuration dialog box by clicking the red close button.



8. To establish a server connection, double-click the saved bookmark.



9. When prompted for a password, enter the one from **Step 1: Creating a key pair**.

Configuring SCP for Windows

This topic describes how to set up secure file transfer via Secure Copy Protocol (SCP) for *Windows* using WinSCP. File transfer is often needed for data exchange when integrating external systems with Optimizely Campaign.

Configuration steps

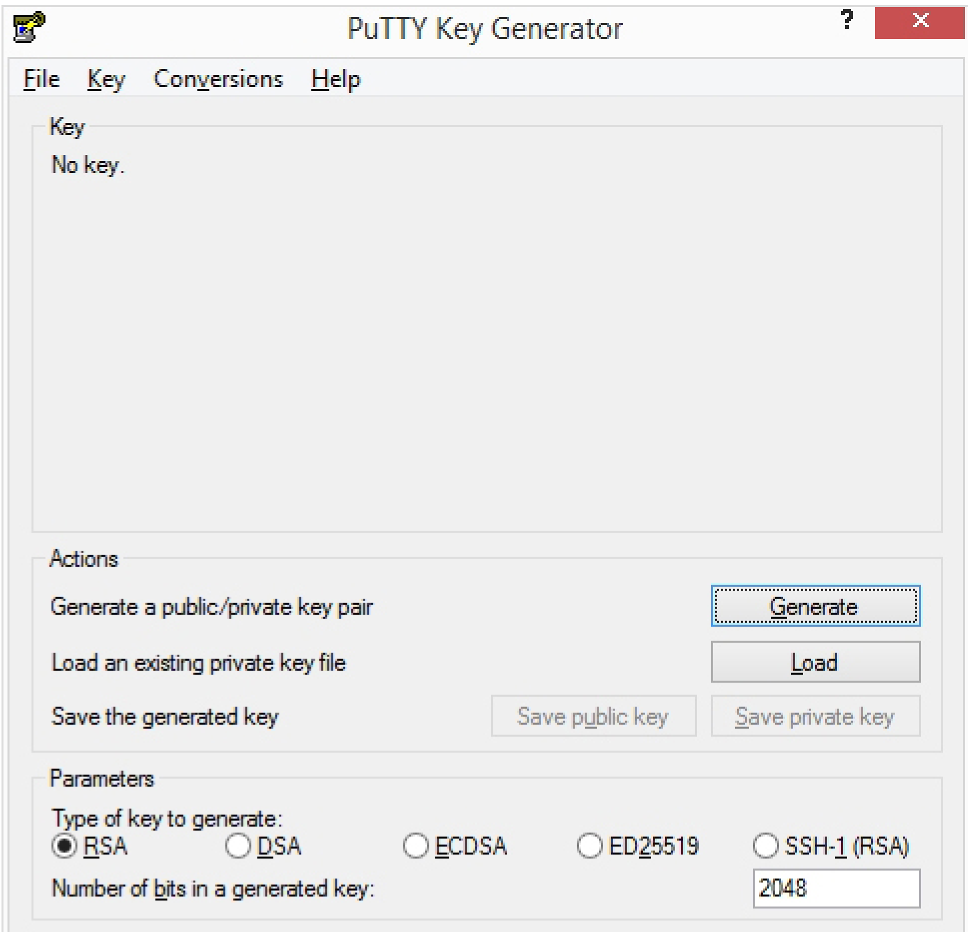
1. Downloading and installing WinSCP
2. Creating a key pair
3. Transmitting keys to Optimizely
4. Establishing a WinSCP connection

Step 1: Downloading and installing WinSCP

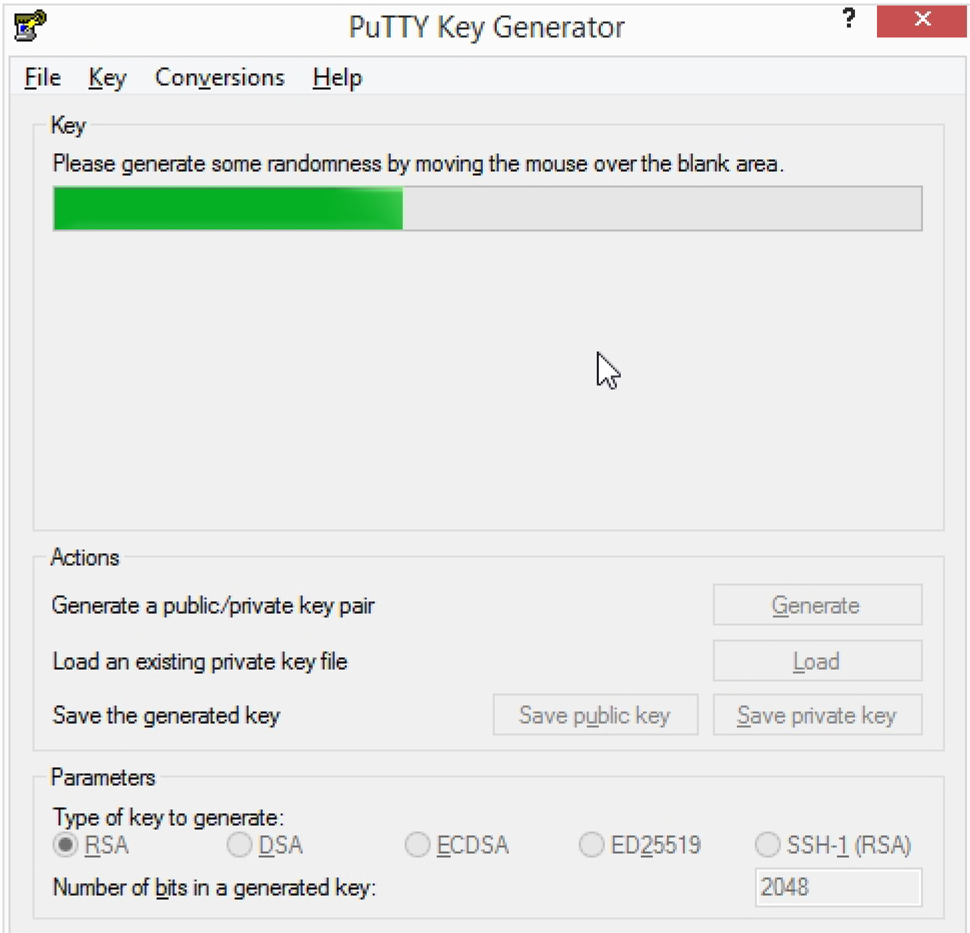
1. Click http://winscp.net/eng/download.php.
2. Click **Download**.
3. Run the setup program.

Step 2: Creating a key pair

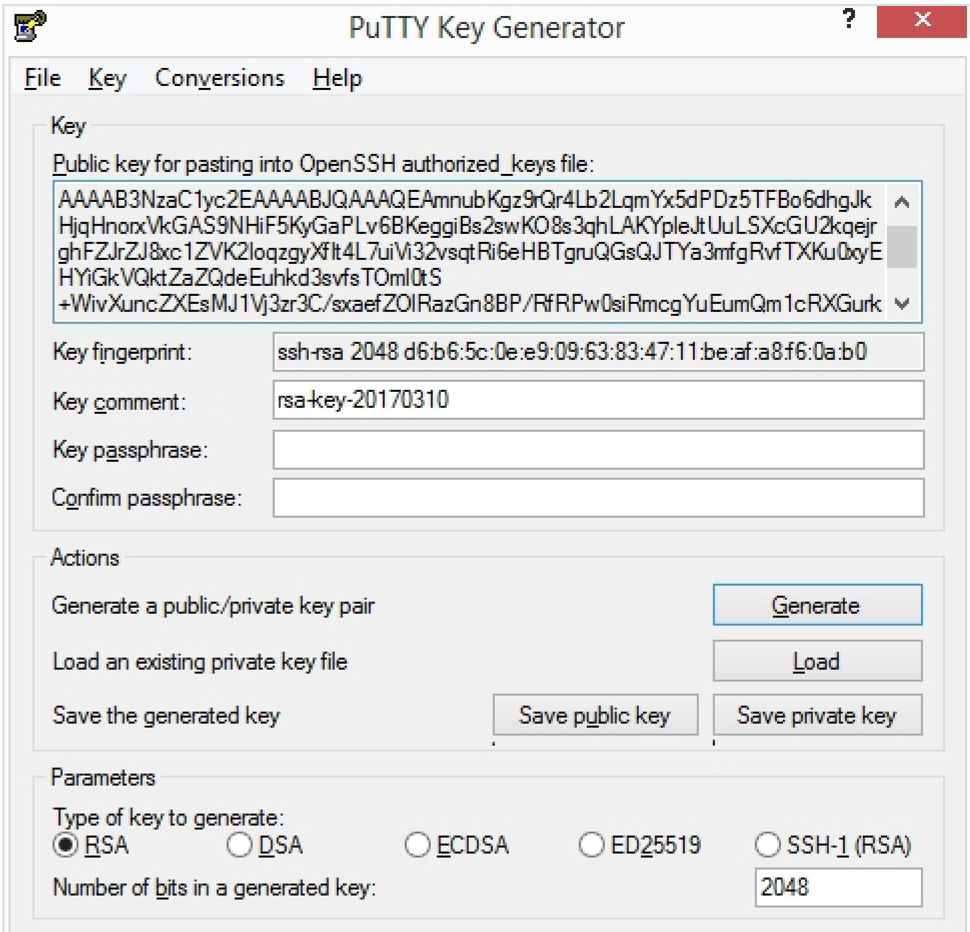
1. Run the **PuTTYGen** program (part of WinSCP).



   a. **Parameters**: Select **RSA** (Optimizely only supports **RSA**).
   b. **Number of bits in a generated key**: Enter **2048**.
   c. Click **Generate**.
2. Make random computer mouse movements across a gray field to generate key values. A progress bar indicates the progress.



When generation is completed, the keys are displayed.



3. Fill in the fields as follows:
   a. **Key comment**: Enter a description such as "Optimizely Campaign-<your_com-panyname>".
   b. **Key passphrase**: Enter a password. For security reasons, use at least an eight-digit word containing letters, numbers and special characters.
   c. **Confirm passphrase**. Enter the password again.
4. Click **Save public key**.
5. Click **Save private key**.

Step 3: Transmitting keys to Optimizely

1. Copy the public key and email it to Optimizely customer support.
2. Copy the key fingerprint and email it *separately* to Optimizely customer support.

   > **Note:** For security reasons, do not send the public key and key fingerprint together.

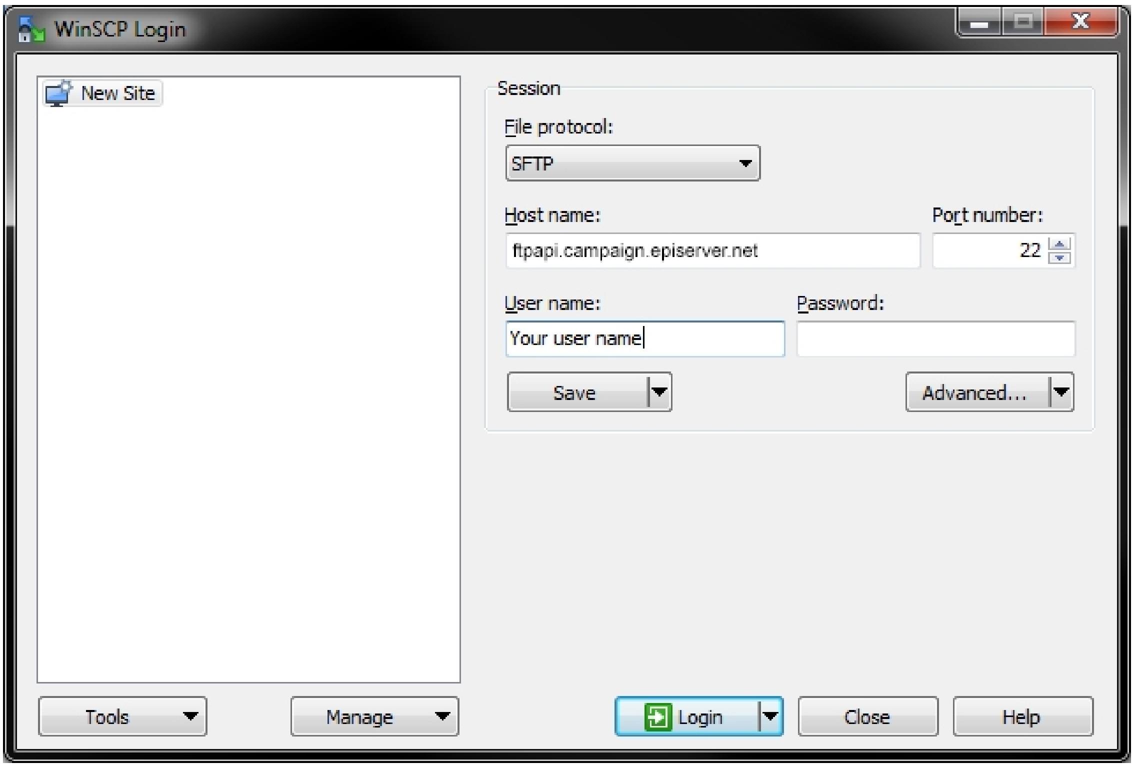
3. Optimizely sends a confirmation when your SCP (Secure Copy Protocol) access is active.

> **Note:** Protect your keys from unauthorized access. If lost, immediately contact Optimizely and generate a new key pair as described above.

© Optimizely 2022

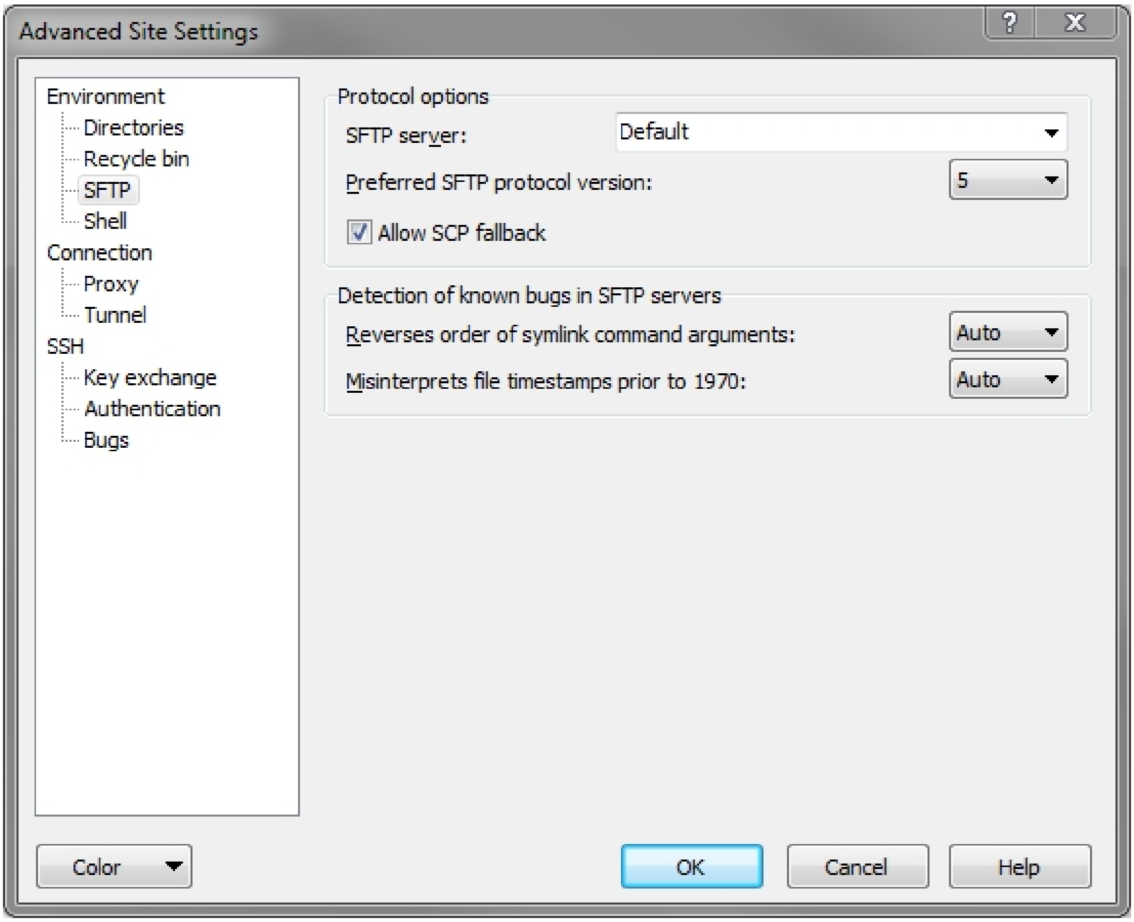
Step 4: Establishing a WinSCP connection

1. Launch the WinSCP program.
2. In the login window, click **New Site**.

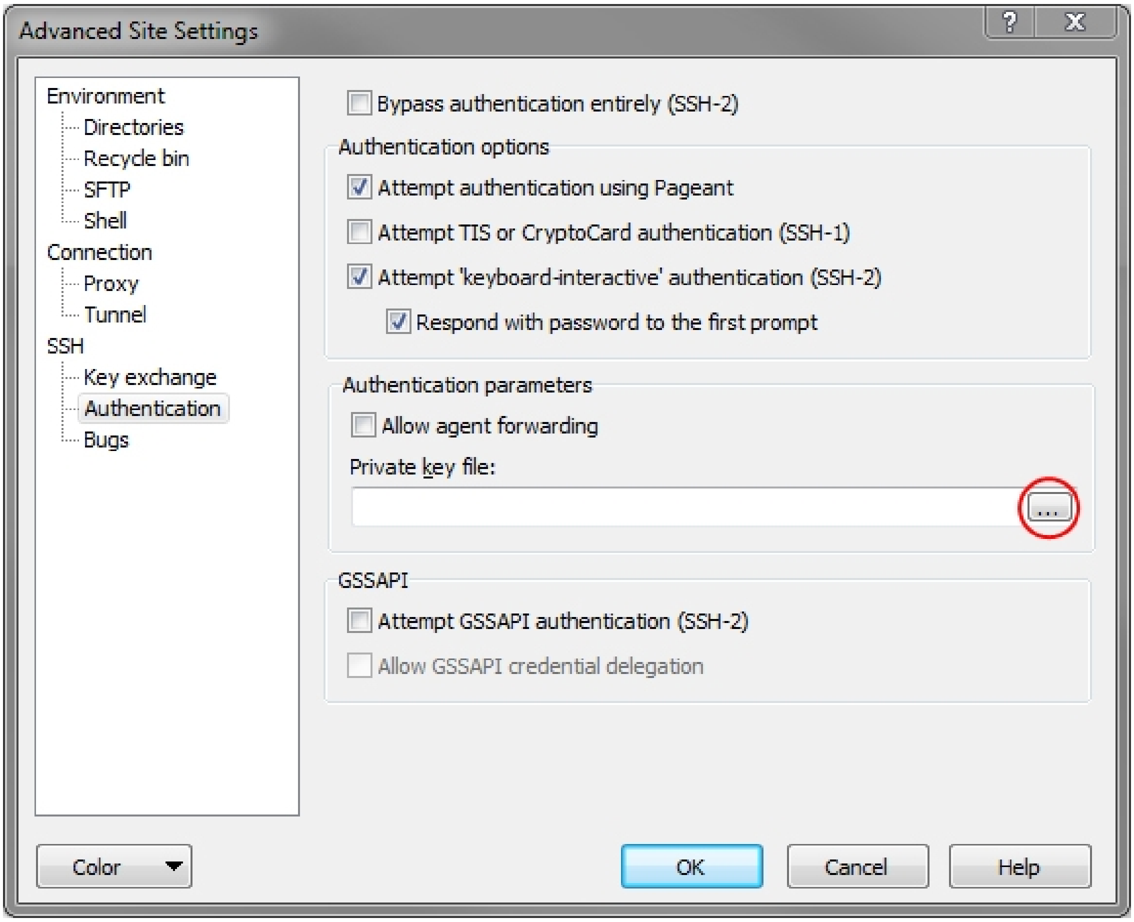


3. Fill out the information as follows.
   - **Host name**: Enter **ftpapi.campaign.episerver.net**.
   - **User name**: Enter name as provided by Optimizely.
4. Click **Advanced...**

5. Select **Environment** > **SFTP** and enable **Allow SCP fallback**.



6. Select **SSH > Authentication**, click **Browse (...)** in **Private key file** and select the previously generated private key.



7. Click **OK**.
8. Click **Save**, enter a name for the connection, and click **OK**.
9. In the **WinSCP login** window, select the connection name and click **Login**.

Webhooks

> **Note:** To enable this feature, contact customer support.

This topic describes how to use webhooks to receive real-time event data about your mailings. You can create webhooks for the following events:

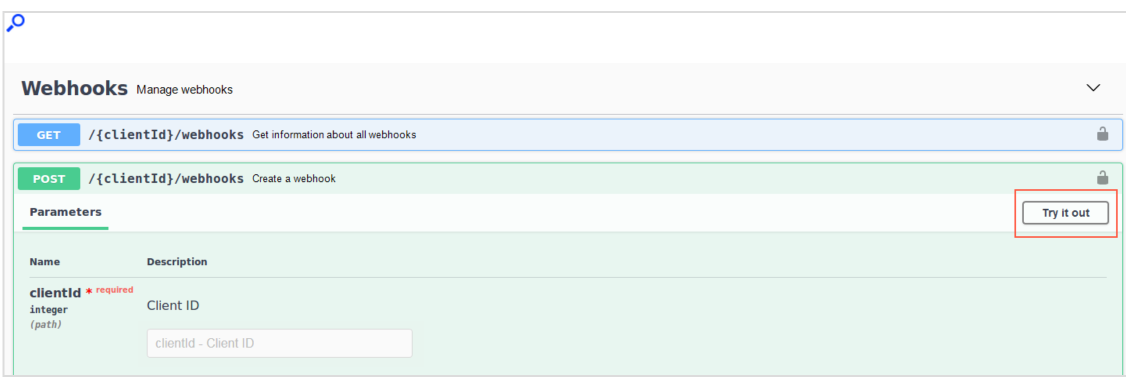
- sent mailings
- opens
- clicks
- bounces
- unsubscribes
- spam complaints

For example, you can use the data for notifications and analyses in external systems such as CRM software. You manage webhooks using the Optimizely Campaign REST API.

- Creating webhooks
- Retrieving webhooks
- Updating webhooks
- Verifying webhooks
- Activating webhooks
- Deactivating webhooks
- Deleting webhooks

Creating webhooks

1. Open the operation **Create a webhook** and click **Try it out**.



2. Enter the following information in the corresponding mandatory fields:
   - **clientId**. Client ID. To see the client ID, open the Optimizely Campaign menu and select **Administration** > **API Overview** > **REST API**.

- **targetUrl**. URL to which the event data is to be sent.

  Prerequisites:

  - URL must be accessible and able to receive data via HTTP POST requests from the IP address 193.169.180.1 at any time
  - current HTTPS version and standard port 443 for HTTPS connections
- **type**. Type of the event data to be sent.
  - **open**. Opened mailing.
  - **click**. Clicked links.
  - **sent**. Sent mailing.
  - **bounce**. Generated hard or soft bounce.
  - **unsubscribe**. Unsubscribed from newsletters. See also: **Unsubscribers**.
  - **spamcomplaint**. Message marked as spam.
- **format**. Data format in which the event data is to be sent.

  > **Note:** The following data format is currently available: *JSON*.

3. Optionally, enter the following information if you want to submit the Basic HTTP Authentication header:
   - **basicAuthUsername**. User name.
   - **basicAuthPassword**. Password.
4. Click **Execute**. If the creation was successful, you receive the HTTP response status code 201.

Retrieving webhook information

To retrieve information about a webhook, such as webhook ID, target URL, and event type, do the following:

1. Open the operation **Get information about all webhooks** and click **Try it out**.
2. In the **clientId** mandatory field, enter your client ID. To see the client ID, open the Optimizely Campaign menu and select **Administration** > **API Overview** > **REST API**.
3. Click **Execute**.

> **Tip:** You need the webhook ID for updating, verifying, activating, deactivating and deleting the webhook.

Updating webhooks

1. Open the operation **Update a webhook** and click **Try it out**.
2. Enter the following information in the corresponding mandatory fields:
    - **clientID**. Your client ID. To see the client ID, open the Optimizely Campaign menu and select **Administration** > **API Overview** > **REST API**.
    - **webhookId**. Webhook ID. You can retrieve the webhook ID with the operation Get information about all webhooks.
3. Update the information as described in Creating webhooks.
4. Click **Execute**. If the update was successful, you receive the HTTP response status code 200.

Verifying webhooks

To verify that the webhook is ready to use and can send event data to the specified URL, do the following:

1. Open the operation **Verify a webhook** and click **Try it out**.
2. Enter the following information:
    - **clientID**. Your client ID. To see the client ID, open the Optimizely Campaign menu and select **Administration** > **API Overview** > **REST API**.
    - **webhookId**. Webhook ID. You can retrieve the webhook ID with the operation Get information about all webhooks.
    - **mailingId**. ID of a valid mailing, for example a test mailing in Smart Campaigns.
3. Click **Execute**. If the verification was successful, you receive the HTTP response status code 200.

Activating webhooks

To export event data in real time, you must activate the corresponding webhook. Do the following:

1. Open the operation **Activate a webhook** and click **Try it out**.
2. Enter the following information in the corresponding mandatory fields:
   - **clientID**. Your client ID. To see the client ID, open the Optimizely Campaign menu and select **Administration** > **API Overview** > **REST API**.
   - **webhookId**. Webhook ID. You can retrieve the webhook ID with the operation Get information about all webhooks.
3. Click **Execute**. If the activation was successful, you receive the HTTP response status code 200.

Event data

As soon as a mailing recipient performs an action, Optimizely Campaign sends the corresponding event data via a HTTP POST request to the target URL. The event data is sent in batches (lists) consisting of a maximum of 100 events each.

> **Note:** After successful data receiving, the target URL must return the HTTP response status code 200. Otherwise the export is retried every 10 seconds. If no data can be delivered three days after the event is created, the event is discarded.

```
[
  {
    "type":"open",
    "recipientId":"123456789005",
    "userListId":123456789003,
    "remoteAddress":"10.420.3.42",
    "clientId":123456789001,
    "mailingId":123456789004,
    "created":1564590054000,
    "subscriptionId":1234567,
    "mailId":"3P5W8B4-3P5W0LI-BSLXEC",
    "mediaTypesToAddresses": {
      "EMAIL":"john.smith@example.com"
```

```
    },
    "device":"desktop",
    "operatingSystem":"Windows 10",
    "browser":"Firefox 64.1"
  },
  {
    "type":"open",
    "recipientId":"123456789005",
    "userListId":123456789003,
    "remoteAddress":"10.420.3.42",
    "clientId":123456789001,
    "mailingId":123456789004,
    "created":1564590054000,
    "subscriptionId":1234567,
    "mailId":"4P6W8B4-4P6W0LI-BSLXEC",
    "mediaTypesToAddresses": {
      "EMAIL":"john.smith@example.com"
    },
    "device":"desktop",
    "operatingSystem":"Windows 10",
    "browser":"Firefox 64.1"
  }
]
```

```
{
    "type":"click",
    "link":"https://www.optimizely.com",
    "mailingId":10230355206,
    "remoteAddress":"10.420.3.42",
    "linkId":10180855027,
    "device":"desktop",
    "browser":"Safari 13.1",
    "operatingSystem":"Mac 10.13",
    "created":1617108763000,
    "mailId":"4P6W8B4-4P6W0LI-BSLXEC",
    "mediaTypesToAddresses": {
      "EMAIL":"john.smith@example.com"
    },
    "userListId":10180860004,
    "recipientId":"john.smith@example.com",
    "subscriptionId":10227900201,
    "clientId":10180860001
}
```

```
{
    "mailingType":"campaign",
    "type":"sent",
    "id":"0a673110-17883138caf-178832ea49f-2690c03e51f4cc26",
    "mailingId":10230355206,
    "mediaType":"EMAIL",
```

```
    "mailingName":"Welcome",
    "created":1617108575391,
    "mailId":"4P6W8B4-4P6W0LI-BSLXEC",
    "mediaTypesToAddresses": {
      "EMAIL":"john.smith@example.com"
    },
    "userListId":10180860004,
    "recipientId":"john.smith@example.com",
    "subscriptionId":10227900201,
    "clientId":10180860001
}
```

```
{
    "type":"bounce",
    "id":"0a673102-178d27b2c8c-178d2cac0e4-c7420699923845e",
    "recipientId":"john.smith@example.com",
    "userListId":10180860004,
    "clientId":10180860001,
    "created":1617108575391,
    "subscriptionId":10227900201,
    "mailId":"4P6W8B4-4P6W0LI-BSLXEC",
    "mailingId":10230355206,
    "mediaTypesToAddresses": {
      "EMAIL":"john.smith@example.com"
    },
    "category":"softbounce",
    "mediaType":"EMAIL",
    "reason":"other",
    "thresholdExceeded":false
}
```

Tip: The `"category"` parameter defines the bounce category; `"soft-bounce"` or `"hardbounce"`. The `"reason"` parameter defines the bounce reason; `"spam-related"` or `"other"`. The `"threshold-Exceeded"` parameter defines whether the recipient exceeded the bounce limit.

```
{
    "type":"unsubscribe",
    "reason":"Unsubscribe via REST API",
    "id":"0acb3115-17aa6042099-17aaa1c69bf-6efb42209c0b1",
    "mailingId":10230355205,
    "mediaTypesToAddresses": {
      "EMAIL":"john.smith@example.com"
    },
    "mediaType":"EMAIL",
```

```
    "subscriptionId":10237984200,
    "mailId":"4P6W7B7-4P5W0LI-BALXEC",
    "created":1617108763000,
    "recipientId":"john.smith@example.com",
    "userListId":10180860009,
    "clientId":10180860001,
}
```

```
{
    "mailingType": "campaign",
    "providerName": "AOL",
    "id": "0a0a3742-17k7f11690c-13c82b66689-63eb542f53667a61",
    "mailingId": 365704742069,
    "type":"spamcomplaint",
    "mediaTypesToAddresses": {
      "EMAIL":"john.smith@example.com"
    },
    "subscriptionId":10237984200,
    "mailId":"4P6W7B7-4P5W0LI-BALXEC",
    "created":1617108763000,
    "userListId":10180860009,
    "recipientId":"john.smith@example.com",
    "clientId":10180860001,
}
```

Deactivating webhooks

If you no longer want to export event data, you must deactivate the webhook. The webhook still exists and you can reactivate it later. Do the following:

1. Open the operation **Dectivate a webhook** and click **Try it out**.
2. Enter the following information in the corresponding mandatory fields:
   - **clientID**. Your client ID. To see the client ID, open the Optimizely Campaign menu and select **Administration** > **API Overview** > **REST API**.
   - **webhookId**. Webhook ID. You can retrieve the webhook ID with the operation Get information about all webhooks.
3. Click **Execute**.

Deleting webhooks

For example, if you no longer need a webhook or want to create new webhooks, but the creation limit per client is reached, you can delete webhooks. Do the following:

© Optimizely 2022

> **Note:** You can only delete deactivated webhooks. See Deactivating a webhook.

1. Open the operation **Delete a webhook** and click **Try it out**.
2. Enter the following information in the corresponding mandatory fields:
   - **clientID**. Your client ID. To see the client ID, open the Optimizely Campaign menu and select **Administration** > **API Overview** > **REST API**.
   - **webhookId**. Webhook ID. You can retrieve the webhook ID with the operation Get information about all webhooks.
3. Click **Execute**.

API overview

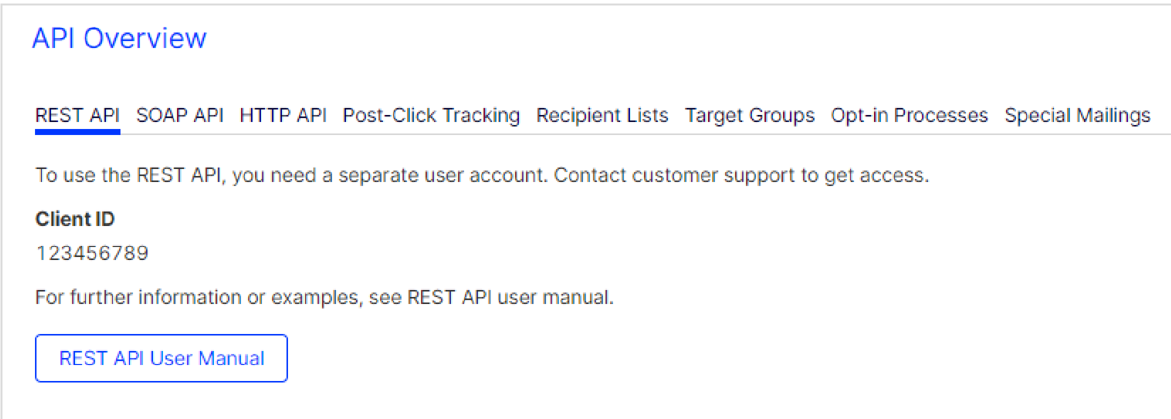
The **API overview** provides access to specific data like URLs, IDs and authorization codes required when integrating Optimizely Campaign using for example REST and SOAP APIs.

To open the API overview, open the Optimizely Campaign menu and select **Administration** > **API Overview**.

See also API documentation on Optimizely World:

- REST API
- SOAP API
- HTTP API
- SMTP API

Information in the API overview



REST API

The ID of the client you are logged in to and a link to the REST API User Manual.

SOAP API

The ID of the client you are logged in to and a link to the SOAP API User Manual.

HTTP API

Here you find a link to the HTTP API User Manual with more information and examples.

Post-Click Tracking

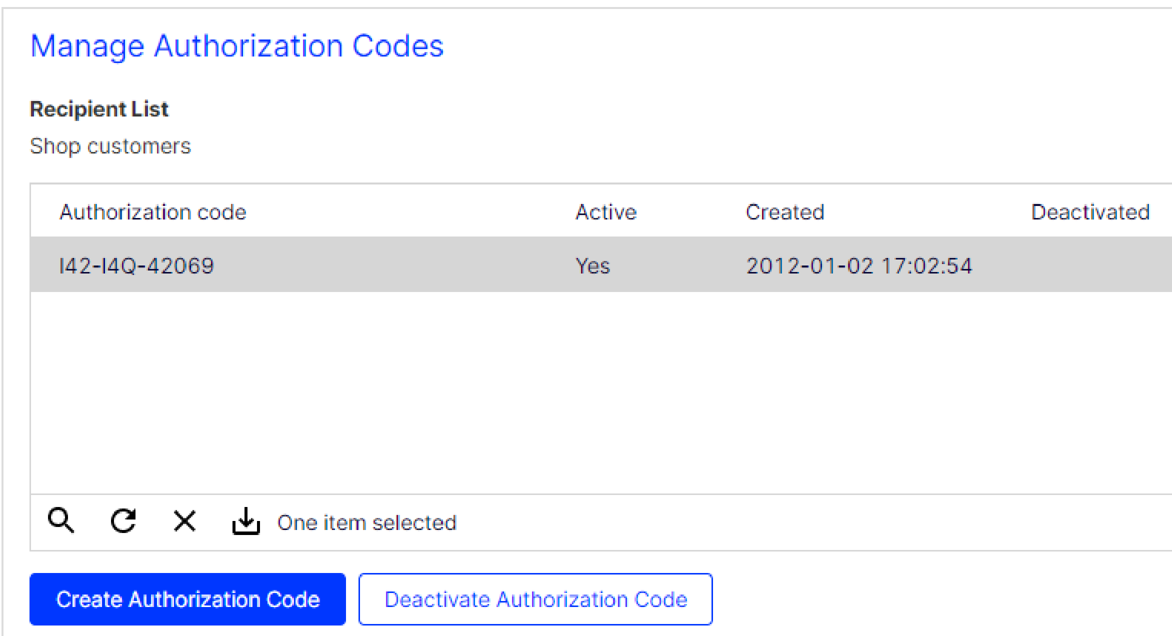
- **Standard Basic URL**. The default URL for the tracking of post clicks.
- **User Event Basic URL**. The URL for the tracking of post clicks that are not related to a mailing.

Recipient Lists

Overview of the recipient lists in your client, and information required for the HTTP and SOAP APIs.

You can also manage authorization codes for recipient lists:

1. Select a recipient list in the listing.
2. Click **Manage Authorization Codes...**.
3. Click **Create Authorization Code** to add a new code for the recipient list. Or, select an authorization code in the list and click **Deactivate Authorization Code**, to deactivate it.



Target Groups

Target groups are available in your client, with information required for the HTTP and SOAP APIs.

Opt-in Processes

Opt-in processes are available in your client, with information required for the HTTP and SOAP APIs.

Special Mailings

Special mailings are available in your client, with information required for the SMTP API.

© Optimizely 2022

Support

This section provides contact details of the Optimizely customer support if you have any questions or problems. You can also find out about Optimizely's wide range of services such as training or the full-service dispatch.

- Customer support. Contact details of the Optimizely customer support.
- Full-service dispatch. Mailing dispatch by Optimizely.
- Trainings. Recorded video trainings and individual trainings.
- Configuration of scheduled jobs. For regular tasks such as data imports and exports, customer support can create automated jobs.

Customer support

<table>
<tr><th>Country</th><th>Product</th><th>Email</th><th>Telephone</th><th>Availability</th></tr>
<tr><td rowspan="2">Germany, Austria, Switzerland</td><td>Optimizely Campaign</td><td>campaignsupport@optimizely.com</td><td>+49 (0)30-76 80 78 400</td><td>Monday to Friday, 9 a.m. to 6 p.m. (CET)</td></tr>
<tr><td>Any other</td><td rowspan="2">support@optimizely.com</td><td rowspan="2" colspan="2">See the support portal</td></tr>
<tr><td>All others</td><td>Any</td></tr>
</table>

Full-service dispatch

If you want to send mailings to your customers at regular intervals but do not have time to import new recipients, create new mailing content, and run a quality check before sending a mailing, use Optimizely's full-service mailing dispatch. Supply Optimizely with addresses, the latest content, and your message template, and Optimizely takes care of the rest, including reporting after the process is finished. To ensure quality, Optimizely sends a test mailing for your approval prior to the actual dispatch.

And, you can use the layout for subsequent newsletters – just supply Optimizely with updated content.

Needed information

Optimizely needs the following information to generate a full-service mailing dispatch:

- **Recipient data and test recipients** as a CSV file (containing at least an email address)
  - For a personalized mailing, include a salutation or title, first and last name, and other desired criteria.
  - If target groups are being used, include supplementary columns (for example, only distribute to recipients who specified "mobile device" when registering, or addresses whose code that starts with **49**)
- **Newsletter template** as an HTML file or graphic.
- **Subject line** for the mailing.
- **Sender** (such as *Your Company Product News*) and return address (such as *news-@example.com*).

> **Note:** You need to delegate the sending domain to Optimizely beforehand. This can take up to 72 hours;Optimizely cannot control the time required. Also, you cannot use a domain delegated to Optimizely for any other purpose (for example, as a log-in page), because the selection would produce no response. If you cannot delegate a sending domain, contact customer support.

- **Email address** for replies.
- Current content, where it differs from the template.
- Planned **dispatch date**.

To avoid complaints about unsolicited emails, observe these guidelines:

- You received an opt-in for all addresses, confirming the recipients' desire to receive promotional emails.
- Optimizely may require confirmation of this approval.

Lead time

Plan sufficient lead time to ensure that you can send mailings on schedule. When Optimizely has all necessary information, Optimizely creates a timetable containing:

- Date for sending a test mailing
- Date by which correction requests must be submitted
- Date by which corrections are incorporated and a second test mailing is sent
- Date by which mailing must be approved
- Date for sending actual mailing

Allow approximately five working days to evaluate the test mailing, incorporate correction requests, and provide final approval.

What Optimizely does for you

After you supply Optimizely with information and the planned sending date, Optimizely does the rest. This includes:

- **Scheduling**. Sends you a schedule showing when
  - the mailing is ready for testing
  - your correction requests must be submitted
  - corrections are incorporated
  - your final approval is needed
- **Address check**. Checks for problem addresses before importing recipients. If a significant number of addresses may be a problem, Optimizely contacts you.
- **Importing addresses**. Compiles a recipient list that matches your address list, then imports recipients.
- **Creating the mailing**. Creates a multi-stage mailing based on your message template. Any graphics included in the template increase your cost. So, it is best to include graphics as HTML files in the message template.

© Optimizely 2022

- **Modifying content**. Incorporates the new text and images if current mailing content differs from the template.
- **Testing and quality control**. Tests mailing before it is sent to test recipients. Optimizely checks whether major providers and freemailers (T-Online, web.de, GMX , and so on) deliver the mailing to intended in-boxes, or if spam filters catch any of them, and whether the contents are displayed correctly.
- **Sending test emails**. When your mailing passes quality control, it is sent to the supplied test recipients. You screen the content one last time. After that, either send Optimizely your correction requests, or notify Optimizely by email your approval of the mailing.
- **Incorporating corrections**. Incorporates your changes into the mailing and sends it to test recipients a second time.
- **Mailing to a distribution list**. When Optimizely receives your final approval, the mailing is sent to recipients on the distribution list as scheduled.
- **Sending report**. Within two work days of the sending date, you receive an initial report containing the following information (in both diagrams and data). You get a final report within ten work days.
  - Recipients
  - Emails opened
    - unique opens
    - opens over time
  - Opening rate (%)
  - Clicks
    - unique clicks
    - clicks over time
    - total clicks by link
  - Click-rate (%) and effective unique click-rate (%)
  - Number of responses and response rate (%)
  - Number of unsubscriptions and unsubscribe rate (%)

Trainings

Let the professionals educate you - live or via recorded video training. Optimizely offers a range of regular and customized training formats aimed at both beginners and experienced users. If you would like individual training, please contact customer support.

Individual trainings

Web-based

With an individual, web-based training you will learn how to use the software in a very short time. The training courses are held for up to five participants with the help of the web learning software **Zoom**. Optimizely uses realistic scenarios to teach the basic functions of Optimizely Campaign. If you would like to add more topics to the training, you can discuss the content with the trainer in advance and make an appointment. The training courses last from one and a half hours to a maximum of two hours. The participants need a telephone and Internet access for the briefing.

On-site

This training format is suitable for getting to know the software intensively and for conveying special scenarios. Optimizely develops a training program with tasks and gives an intensive introduction into the use of Optimizely Campaign. The standard modules include recipient import and administration, creating and sending mailings, creating and interpreting reports. On request, we can integrate content and exercises into the training that correspond to your specific application scenarios. After the training, all participants receive handouts. The training is designed for a maximum of five participants. Premises, a projector, a computer for the trainer and, if possible, one computer for each participant (all computers must have an Internet connection) are provided by you.

© Optimizely 2022

Scheduled jobs

On request, customer support sets up scheduled jobs for you that automate regular tasks like recipient list based import and export. CSV files form the basis for regular automatic imports and exports.

Scheduled jobs overview

> **Note:** To enable this feature, contact customer support.

To view the scheduled jobs configured in your client, open the Optimizely Campaign menu and select **Administration** > **Scheduled Jobs**. To display job details, select a scheduled job from the list.

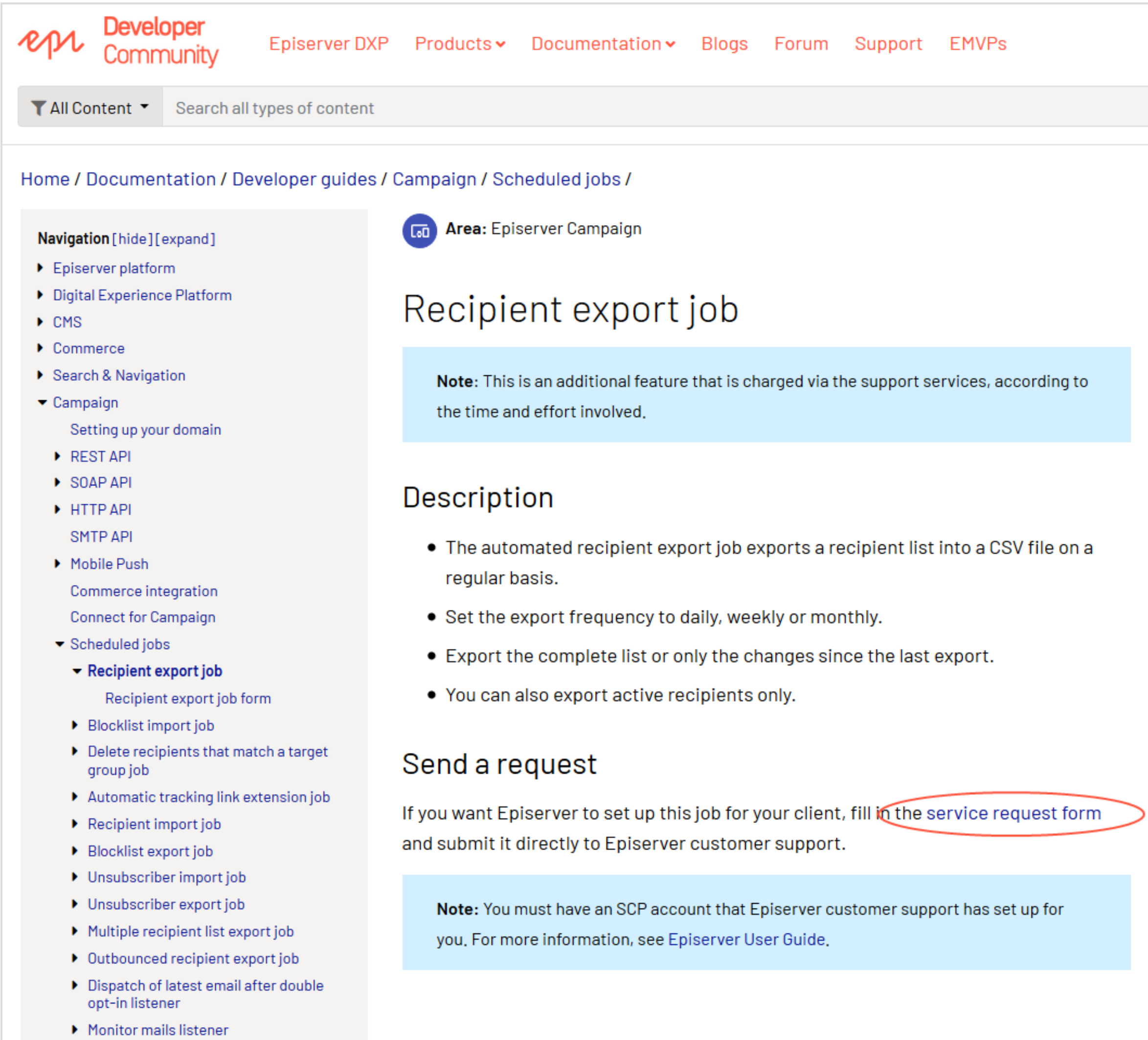
You can also use the Optimizely Campaign REST API to retrieve information on which scheduled jobs are configured or running in your client.

Configuring scheduled jobs

> **Note:** To use this feature, you need an SCP account that Optimizely customer support has set up for you. Contact customer support if you do not have an account yet.

You can find a selection of available scheduled jobs under Scheduled jobs on Optimizely World. Click a job to open a description page that contains a link to the corresponding online form.

© Optimizely 2022


Developer Community
Episerver DXP Products Documentation Blogs Forum Support EMVPs
All Content Search all types of content

Home / Documentation / Developer guides / Campaign / Scheduled jobs /

Navigation [hide] [expand]
- Episerver platform
- Digital Experience Platform
- CMS
- Commerce
- Search & Navigation
- Campaign
  - Setting up your domain
  - REST API
  - SOAP API
  - HTTP API
  - SMTP API
  - Mobile Push
  - Commerce integration
  - Connect for Campaign
  - Scheduled jobs
    - Recipient export job
      - Recipient export job form
    - Blocklist import job
    - Delete recipients that match a target group job
    - Automatic tracking link extension job
    - Recipient import job
    - Blocklist export job
    - Unsubscriber import job
    - Unsubscriber export job
    - Multiple recipient list export job
    - Outbounced recipient export job
    - Dispatch of latest email after double opt-in listener
    - Monitor mails listener

Area: Episerver Campaign

Recipient export job

Note: This is an additional feature that is charged via the support services, according to the time and effort involved.

Description

- The automated recipient export job exports a recipient list into a CSV file on a regular basis.
- Set the export frequency to daily, weekly or monthly.
- Export the complete list or only the changes since the last export.
- You can also export active recipients only.

Send a request

If you want Episerver to set up this job for your client, fill in the service request form and submit it directly to Episerver customer support.

Note: You must have an SCP account that Episerver customer support has set up for you. For more information, see Episerver User Guide.

To use the online form, you need to log in to Optimizely World or create a new account within a few steps. Open the form and fill in all mandatory fields and add optional information.

> **Note:** Upon submission of the form, processing fees are incurred in the amount of the contractually agreed support costs. If there are additional setup costs besides the processing fee, customer support will contact you with an offer.

Automatic data import

Automatic import jobs let you synchronize your external distribution list with Optimizely Campaign's recipient lists. You can decide whether the import should take place daily, weekly or monthly.

The file is transmitted via SCP (Secure Copy Protocol) and stored on a server provided by Optimizely. The import to your client is handled automatically. You receive a success notification after each import.

Optimizely Campaign supports automatic recipient list imports, automatic blocklist imports and unsubscriber imports.

Automatic data export

The automatic recipient export writes list entries from Optimizely Campaign to a CSV file and stores it on a server provided by Optimizely. You can then download the CSV file automatically or manually from this server.

Optimizely Campaign supports automatic recipient list export, automatic blocklist export, automatic unsubscriber exports and outbounced recipients exports.

Other features

In addition to the import and export jobs, there are more features such as the dispatch of the latest mailing after double opt-in feature that automatically sends the last mailing to newly registered recipients when they have gone through the double opt-in process.

For more information on available jobs and features, see Scheduled jobs on Optimizely World.

Optimizely Digital Experience Platform

The Optimizely Digital Experience Platform unifies digital content, commerce and marketing in one platform, including omnichannel solutions for intelligent campaigns. The platform uses artificial intelligence and behavioral analytics to deliver personalized experiences everywhere. With our secure, reliable platform you can quickly increase engagement, revenue and productivity, while getting the fastest time to value.

About Optimizely

At Optimizely, we're on a mission to help people unlock their digital potential. We equip teams with the tools and insights they need to experiment in new and novel ways. Now, companies can operate with data-driven confidence to create hyper-personalized experiences. Building sophisticated solutions has never been simpler. Learn how we unleash new limits at **optimizely.com**.

www.optimizely.com